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Development Resource Documents

Developing Cultural Cinema in Ireland

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NORTHERN IRELAND FILM COMMISSION

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Developing Cultural Cinema in Ireland

A report commissioned by
The Arts Council/An Chomhairle Ealaíon
The Irish Film Board/Bord Scannán na hÉireann
and Enterprise Ireland in association with
The Northern Ireland Film Commission

by Neil Connolly and Maretta Dillon

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Preface

In comissioning this report along with The Irish Film Board and Enterprise Ireland in association with The Northern Ireland Film Commission, The Arts Council's motivation was to draw attention to emergent issues and questions that confront all of us who are involved in the exhibition of what we are calling cultural cinema. The report gives us a set of views, ideas, analyses and proposals that need discussion and interrogation by a broad range of organisations and individuals concerned with cultural cinema. No doubt other questions and directions will emerge from such discussion and debate. For The Arts Council, this is especially timely as we set about the process of making the next Arts Plan for 2002 and beyond. It is timely also for other reasons which include the many new infrastructural developments in cinema provision on this island, the growing range of leisure and recreational options open to people and the increasingly intense competition for peoples' attention (and money), and the big issue of peoples' quality of experience and engagement with the cinematic arts.

We hope that this report will be received in the spirit of an opening move, rather than the last word, in the process of planning and resourcing citizens' opportunities to experience cultural cinema in Ireland. The report is there first of all to be read, and then to be argued over, agreed with, disputed, contradicted, supported, wondered at and carried everywhere by all those interested in the debate that will follow! We hope that the film community will participate fully in the process of consultation, discussion and reflection that we will organise during 2001, built around this report.

The Arts Council wishes to acknowledge with thanks the work of Neil Connolly and Maretta Dillon in producing this important resource document which is the Council's first publication in its 50th anniversary 2001 programme. Our associates, Bord Scannán na hÉireann, the Northern Ireland Film Commission and Enterprise Ireland helped to make this project particularly valuable as a policy resource for an important element of the contemporary arts in Ireland. Our thanks also to Mary Hyland (Film Officer 1997-2000), Paula O'Meara and Adrienne Martin (Film and Visual Arts Executives) and Siobhan Bourke (Film Adviser).

Dermot McLaughlin,
Artform Director, The Arts Council / An Chomhairle Ealaíon

Preface

Cinema exhibition is the space of excitement and desire. It is the space where films live and meet their audience. After the long and intricate process of making a film, the cinema screening can be a marvellous, unique, communal experience.

Multi-screen cinemas offer the best of American cinema in comfort but the side effects of the pervasive power of that form of cinema excludes many other types of film from further afield, or even nearer home, which find it impossible to live or flourish in the multiplex. The very pretext of US cinema sets up terms and expectations that are hostile to smaller films, more personal films, ruder films, riskier films, stranger films, thoughtful films. The global exchange rate is desperate: 96% of the films shown on Irish screens are American, less than 2% of the films shown in the US come from outside that country.

But as the Irish Film Centre in Dublin, the Queens Film Theatre in Belfast and the Kino in Cork (and active film societies in many other places) have shown, there is a significant audience for the greater diversity and choice of a wider world cinema. These venues build on the range of long-standing annual film festivals in different towns and cities where a expansive range of international cinema can be glimpsed; they try to turn this into a sustainable presence of other images...

By allowing smaller films time to establish themselves and to be spread by enthusiastic 'word of mouth', the art house keeps at bay the pressure of new American product that can drive films off the screen after only the first weekend. Subtitled films from any part of the world, no matter how brilliant and how Oscar-nominated, stand little chance in this hostile environment. Art houses create a niche market for certain kinds of cinema in ways the multi-screen never can. The metaphor of the delicatessen as opposed to the supermarket has often been invoked; and indeed the differences between coffee with carrot cake and popcorn with coke often experienced.

Of course the art house production sector itself has evolved and changed over the decades. The dominance of the European film-makers of the Seventies (say Fellini, Truffaut, Fassbinder, Godard) has been replaced with a wider mix including American independents and directors from Africa, Asia and Latin America.

At a time when film production in Ireland is growing so rapidly it is vital that audiences throughout this island have the opportunity of viewing a wide range of new Irish films in a congenial environment. At the present time many of the Irish Film Board's films reach their target audience in the omniplex - *About Adam* or *Accelerator* thrive in multi-screens. But others, such as *Nora* or *Country*, could perhaps sit better in specialist venues. The distinct cinemagoing experiences of the multi-screen and the art house are complementary and essential.

An art house cinema creates audience loyalty by the taste of its programming, the comfort and ambience of the venue and its imaginative marketing strategies. The physical comfort and attractiveness of art house venues is an important part of the specific forms of pleasure they offer. It is certainly a precarious economy, but with entrepreneurial enterprise it is a fertile ground for public / private partnership which can connect with the increasing use of film in education.

The most pressing need is to consolidate and extend art house exhibition outside Dublin. The Report's focus is on regional screening facilities, emphasising the need to strengthen access to world cinema in other cities and regional centres. There could be concerted synergy between venues in the capital and the regions to support the release of new titles.

This year will also see the exciting launch of the Cinemobile which will tour this whole island and the Aisling Gheal Liatroma in that county; both of these set out to take film to rural locations and contribute to the cultural life of the communities they visit.

This Report offers some useful starting points and hard calculations - benchmarks to calculate the demographics and commercial potential of the entrepreneurial art house. It also proposes a dialogue for the separate venues - a voluntary co-operative circuit of art houses.

Cinema exhibition which celebrates the variety and power of films from around the world is not a luxury. The increasing threat to international cultural diversity was recently described by Alpha Oumar Konare, the President of Mali - "It's like standing in a burning library".

Rod Stoneman,
Chief Executive, The Irish Film Board / Bord Scannán na hÉireann

1 | Executive Summary

Introduction

This study was commissioned by the Arts Council, The Irish Film Board Association and Enterprise Ireland, in association with the Northern Ireland Film Commission.

Its objective, outlined in the terms of reference, is to examine the options and feasibility of creating a cost-effective network of independent art house cinemas in regional areas of Ireland, North and South, with a view to widening the choice for cinema audiences throughout Ireland.

The term "art house" was not defined and is difficult to characterise with a simple definition. Its contemporary imprecision, in fact, is a challenging indicator of a continually changing cinema landscape in which distinctions between "art films" and "commercial films" can no longer be conveniently made as frontiers between the two forms of practice are continually blurring.

However, the term art house is emphatically not used here to imply concepts of "high art" or to delineate a narrow band of select films. Rather, the aim of the art house envisaged is to assert the possibility of the very opposite. Its goal is to widen the choice for cinema audiences, extend the range of films available and celebrate and stimulate appreciation of diversity in Irish and world cinema.

The importance of these objectives, which embrace the impulse to educate as well as to entertain, stems from cinema's powerful cultural, social and ethical impact and a recognition of the positive potential of film culture and film education in contemporary society.

The term "cultural cinema" will be used throughout this study as a synonym to characterise the art house as a space which, while defending the possibility of film as art and the film-maker as artist, implies a more broadly-based cultural vision that recognises that cinema is a consumer industry with a powerful influence and also a complex cultural phenomenon.

We cannot explore distinctions between film as part of the broad cultural map and film as art here but it is important to acknowledge the need for further discussion about this. The fact that a range of partnership organisations has commissioned this study indicates recognition of shared responsibilities in this regard and complementarity in, for example, The Arts Council's relationship with the Irish Film Board that needs to be examined.

The future management of shared responsibilities between these funding agencies presents a serious challenge. Specific roles, relationships and responsibilities will need to be more clearly defined and executive structures reviewed as first crucial steps to assisting the future development of cultural cinema in Ireland.

Key Findings and Conclusions

Commercial cinema exhibition has been going through a period of extraordinary growth fuelled by high levels of investment in new multiplex development and programmes of renovation and multi-screening of older cinemas throughout Ireland.

The latest Eurostat statistics for 1998 show that Ireland, with an average of 3.4 annual visits to the cinema per person, has the highest rate of cinema attendance in Europe. More recent Irish data shows that the rate of cinema-going increased by 20% in 2000 to 4.1 visits per person.

Film and popular cinema culture now penetrates this country more deeply than any other form of dialogue and art. Arguably, moving images that both mirror and create desires and conflicts at the heart of Irish life, are the most influential form of communication we have today.

Yet, opportunities to engage with this seemingly accessible art form in the broadest and deepest way are not available to audiences throughout Ireland.

Only four cinemas currently operate on a full time basis as art house cinemas: Belfast's Queen's Film Theatre (QFT), Cork's Kino and, in Dublin, the Irish Film Centre (IFC) Cinemas and the Screen Cinema.

With the exception of the IFC Cinemas in Dublin (the flagship cultural cinemas operated by the Film Institute of Ireland (FII) and uniquely in this country an integral part of a publicly-funded centre also housing a specialist film bookshop and library, the Irish Film Archive, fiieducation as well as a bar and restaurant), developments in cultural cinema have been modest in aspiration as well as seriously under resourced in both financial and human terms.

1 | Executive Summary

Suffering from a dearth of forward strategic planning, cautious advances have been fragmented and uncoordinated, the opening of Cork's Kino, a symbol of pioneering regional development and bold private sector initiative, notwithstanding.

It is understandable that caution would have been a characteristic of development. There is a significant variation in population structure across the country. The combined populations of the State's four major urban centres (including suburbs and environs) outside Dublin — Cork, Limerick, Galway and Waterford — is only 37% of the capital's.

However, population size is not the only factor to be considered in examining what scope for investment specific urban centres offer. High per capita cinema-going often occurs in smaller centres than in larger, as high concentrations of third level students and more affluent socio-economic groupings are often greater.

The quality of cinema provision in terms of management, programming and facilities is an equally crucial factor in determining how many people will attend. This theme of quality is a recurring one throughout this report and echoes wider Government policy objectives for balanced regional development with quality as a key determinant of capacity to achieve objectives of sustainability and regional enhancement.

However, the dearth of reviewable data currently available makes it difficult to analysis the likely future outcome of any new initiatives that might be considered.

This report argues that much groundwork still remains to be done before any new development can proceed. The emphasis must shift back not simply to ongoing support for key existing initiatives but to developing a framework to sustain future development.

We recognise that the consultation process for Erika King's *Film In Ireland-The Role of the Arts Council*, carried out in 1997 has preceded our own and that report contains a comprehensive summary of opinion that is still very relevant and that still rewards close reading.

While some progress has been made on the implementation of King's recommendations, it is noteworthy that many of the conclusions and recommendations in this report echo those to be found in *Film in Ireland.*

This is understandable against the background of a phase of radical change in the way the Arts Council operates, entailing step-by-step implementation of a more developmental approach and a moving away from a system where its financial interventions were driven largely by demand to one where strategic objectives direct the allocation of resources.

However, as the Council itself recognises in its current Arts Plan, moving to a developmental agenda places ever greater demands on a body that must work within Government guidelines limiting increases in staff. The capacity of its film department to deal both with the change and with potential future growth is a matter that the Arts Council itself must discuss, both within and also with its parent Government Department, Arts, Heritage, Gaeltacht and the Islands.

2 | Recommendations

2.00 Introduction
This report recommends that much groundwork must first be done in order to create the essential framework upon which further sustainable development of regional art house cinemas and screening facilities for cultural cinema will depend.

The report argues that the Film Institute of Ireland has a key role to play in contributing experience and expertise to developing the urgently needed regional infrastructure. Realistic and increased funding from The Arts Council and the Northern Ireland Film Commission (NIFC) will need to be allocated in order to support this development work.

The recommendations are generally applicable both North and South though some will have more relevance and immediacy in the South.

The consultants recommend that:

2.01 The Arts Council must restate its responsibility for film exhibition and play a larger advocacy and funding role with renewed energy and commitment. The Council must allocate more resources, both financial and human, if it seriously wishes to progress developments in cultural film exhibition.

2.02 The Arts Council must demonstrate its commitment to film by appointing a full time Film Officer

2.03 The Arts Council should also appoint, on a consultancy basis for a one to three year period, a film exhibition development officer who is specifically responsible for implementing the first phase in developing cultural cinema regionally.

2.04 The Arts Council should adopt a more interventionist approach to developing film exhibition. The Council should work more proactively with the relevant film organisations, local authorities and other agencies to widen access to cultural cinema in all areas.

2.05 The Arts Council and the NIFC should continue to place educational activities and the development of new audiences at the centre of funding support. Existing cultural cinema venues and new projects must prioritise the role of education in their agendas.

2.06 The Arts Council and the NIFC, as the bodies responsible for cultural cinema exhibition, should place increased emphasis on higher standards of technical presentation and customer facilities with a view to developing and expanding audiences.

2.07 The Arts Council and the NIFC in partnership with cultural cinema venues and organisations, local authorities and arts officers must ensure that funds and expertise are made available to undertake detailed research into the existing and potential audiences for cultural cinemas. This research, which must be ongoing, should be a precursor to the implementation of an audience development plan for each organisation and a context for new developments.

2.08 The Arts Council must recognise that building capacity in the sector in terms of skilled personnel will result in more imaginative programming, more innovative educational and programme enhancement work and more effective audience development plans.

2.09 The Arts Council must organise appropriate training initiatives in the cinema exhibition sector in association with Screen Training Ireland, in order to provide access to the specialised training needed for existing and new practitioners.

2.10 The Arts Council and the NIFC must recognise the need for cross collaboration between events and organisations to fulfil the potential for sharing expertise and resources. Funding decisions should, wherever appropriate, favour existing bodies engaged with regional development who show a willingness to co-operate with other film organisations in order to increase the impact and efficiency of their work.

2.11 The Arts Council should set up a permanent Cinema Forum, with the aim of facilitating much needed dialogue and discussion between organisations. It should include representatives of all parties interested in extending cultural film exhibition, including the commissioners of this report, and is envisaged as an essential precursor to any advancement in the development of cultural cinema exhibition in Ireland.

2 | Recommendations

2.12 The Arts Council and the NIFC must encourage existing organisations, in particular the IFC and the Federation of Irish Film Societies (FIFS), to do more to profile the work of Irish film-makers. Organisations in receipt of public funding must increase links with Irish filmmakers and actively work to develop more outlets for their work.

2.13 The Arts Council and the NIFC must introduce performance indicators, which should be developed in a transparent manner in consultation with funding recipients. Used to compliment rather than substitute for qualitative analysis, performance indicators will act as a means of focusing discussion with clients and will provide basic information that is urgently required to set up a data base for the cultural cinema sector.

2.14 The Arts Council and the NIFC must take responsibility as enablers and advocates for cultural cinema exhibition and work proactively with local authorities, local arts officers, Strategy Policy Committees and other relevant regional and national bodies to promote cultural cinema as energetically as possible.

2.15 The Arts Council should instigate dialogue in Cork between the current cultural cinema operators, the Kino and the Cinematek, in order to improve overall provision for audiences. The present situation whereby there is little or no co-operation between venues despite the compactness of the market is not beneficial either to audiences or the parties concerned.

2.16 The Arts Council should continue to encourage the potential inclusion of the Kino cinema in future funding decisions when appropriate. Ongoing dialogue and discussion between the Arts Council and the Kino's management to facilitate this happening and to remove any barriers to closer co-operation is needed. Upgrading technical facilities as well as enhancing marketing and educational activities should be identified as a priority for discussion.

2.17 The Arts Council should assert a commitment to supporting the development of at least a 2 (preferably 3) screen cultural cinema facility in Cork as a key element in sustaining a larger network of regional screening facilities.

2.18 The Arts Council should support the development of a dedicated full time cultural cinema, in Galway allied to an existing arts space. This facility should be located in the city centre where it can contribute to building upon current cultural film activity in association with existing organisations, including the Film Fleadh and Galway Film Society.

2.19 The Arts Council should enter into dialogue and discussions with all organisations currently involved or wishing to be involved in cultural cinema exhibition in Galway. The Arts Council should insist on dialogue between these parties so as to avoid a potential repeat of the current situation in Cork.

2.20 The Arts Council should actively encourage the inclusion of high quality 35mm screening facilities in new arts centre builds or the upgrading of existing facilities. This development of new facilities at the Belltable Arts Centre in Limerick represents a valuable opportunity to advance the sector considerably by putting in place high quality facilities allied to high standards of programming and related activities.

2.21 The Arts Council should encourage and fund more high quality film activity in Garter Lane Arts Centre in Waterford. The availability of 35mm screening facilities needs to be utilised more fully particularly in the area of education. Activities in this area need to be devised and implemented, drawing on the expertise and experience of other film organisations.

2.22 The Arts Council should support the Federation of Irish Film Societies' wish to extend their activities regionally and should consider funding whatever clear and fully articulated strategies they propose to do so. These strategies should be envisaged as forming the basis for of a permanent regional network.

2.23 The Arts Council and the NIFC should only develop new film festivals if they have specific remits or if they target sections of the audience who are not well served by present provision. Existing film festivals should continue to be supported provided they articulate clearly what their artistic policy and vision is. Festivals that stimulate further film exhibition, either locally or regionally, should be supported.

2 | Recommendations

2.24 The Northern Ireland Film Commission should continue to support both the Nerve Centre and the Queen's Film Theatre (QFT) to provide and improve their current provision. In the case of the QFT every effort should be made to open up the venue to audiences, both existing and new, either at its present venue or at a new site in the future. Queen's University and the cinema's principal funders should however look closely at upgrading the present cinema, even if only for the short term. The necessity of differentiating the venue from other cinemas through its programming and related activities, increasing the number of performances and marketing the cinema more effectively should be prioritised.

2.25 The Arts Council and the NIFC as the bodies with the main responsibility for cultural film exhibition should identify ongoing areas where they can forge connections and occasions for co-operation. Cultural film exhibition represents an opportunity for a strengthening of links formed around a common agenda.

3 | Introduction

3.1 The Brief

This study was commissioned by The Arts Council, The Irish Film Board and Enterprise Ireland, in association with the Northern Ireland Film Commission.

In summary, the terms of reference for the study, which are presented in full in Appendix 1, direct us to investigate the feasibility of creating and sustaining a cost-effective network of independent art house cinemas in regional areas of Ireland with a view to widening the choice for cinema audiences throughout Ireland.

3.2 Defining the Art House

It is difficult to characterise the term "art house" with a simple definition. Its contemporary imprecision is a challenging indicator of a changing film world in which distinctions between "art films" as opposed to "commercial films" can no longer be conveniently made since the frontier between the two forms of practice is continually blurring.

Certainly, in the context of this particular study the term is emphatically not used to imply concepts of "high art" or to delineate a narrow band of select films. Rather, the aim of the art house envisaged here is to assert the possibility of the very opposite. Its goal is to widen the choice for cinema audiences throughout Ireland, broaden the range of films available and celebrate and stimulate appreciation of diversity in Irish, European and world cinema.

The importance of these objectives, which embrace the impulse to educate as well as to entertain, flows from cinema's powerful cultural, social and ethical impact. Films are, arguably, the most influential form of communication we have today. More than any other form of dialogue and art they mirror the desires, fears and conflicts at the heart of our culture.

The term "cultural cinema" will be used throughout this study as a synonym to characterise the art house as a space which, while defending the possibility of film as an artform and the film-maker as artist, implies a more broadly-based cultural vision that recognises that cinema is a consumer industry with a powerful influence is also a complex cultural phenomenon.[1]

3.3 Background and Historical Perspective

Fundamental questions about public policy regarding support for art house cinema have hung in the air since the closure in 1984 — more than 16 years ago — of The Irish Film Theatre[2] (IFT) at Earlsfort Terrace in Dublin.

The decision not to provide ongoing revenue support for that project, which was taken by the Arts Council of the day, was more practical than ideological and was based on considerations that were specific to the operational viability of that particular venue at a particular time. Broader issues of principle and longer-term policy were actually not that relevant in the circumstances and the Council's 1984 Annual Report simply expressed the hope that "a new way of providing for the public who wish to see and support a programme of art house films will emerge."

Explicit roots to the commissioning of this feasibility study can be found in the first *Arts Plan 1995 – 1998*, which acknowledged that in order "to extend and challenge audiences, creating a discerning Irish public, there is a need for greater exposure to art house cinema throughout the country." As a strategy for advancing the objective of increasing access to film, the plan proposed "to provide facilities for art house cinema outside Dublin."

Some progress towards considering how this could actually be done was made in the comprehensive strategic review of the Arts Council's role in the development and support of film in Ireland, carried out in 1997 by Erika E King Associates and published as *Film in Ireland – The Role of the Arts Council.*

On the issue of the provision of art house facilities outside Dublin, the King report concludes: "There is strong support for the Arts Council to develop a more strategic approach to encouraging a wider range of films (including films originating in Ireland) to be screened throughout the country. At present most audience development work outside Dublin comes through the film festivals and this must be extended to year-round provision."

[1]Following the publication by the Department of Arts, Heritage, Gaeltacht and the Islands of the discussion document Towards a New Framework for the Arts, The Arts Council, recognising that it is timely to open a wide-ranging debate on the future of cultural policy in Ireland, has launched Future, a web-based resource centre at www.artscouncil.ie/future.htm. See, for further discussion, http://www.artscouncil.ie/future/future2.htm, Defining the "arts", which contains hyperlinks to relevant information.

[2]Established in March 1977, The Irish Film Theatre was operated by a company limited by guarantee set up by The Arts Council to promote the art of cinema in Ireland.

3 | Introduction

Regarding policy on "Cinema Audience Development and Access", the King report recommends: "The Arts Council should incorporate into its audience-led strategies, a pilot Project Fund for Exhibition which will provide a wide range of cinema programming and audience development initiatives with particular emphasis on indigenous films throughout the State. The structure and criteria of the fund should be evaluated and should underpin a wider study to be undertaken jointly with the Irish Film Board to investigate a range of long term support options."

The Film Exhibition Project Fund, which was subsequently introduced by The Arts Council in 1999, before this study was commissioned, was presented as "an interim measure pending the outcome of further research into the long-term provision for film exhibition in Ireland."[3] Evaluation of projects supported by this scheme — a temporary measure without the strategic intent proposed by the King Report — was not included in the terms of reference for this study. However, the possibility of the Film Exhibition Project Fund evolving into a more strategic measure to support the development of future regional cultural cinema projects remains open[4]

The Arts Council's second plan for the arts, *The Arts Plan 1999–2001*, was published in June 1999. Building on the lessons learnt from its predecessor, it sets out a radical new strategic approach to the Council's remit and to planning for the arts over the three years of the plan. Moving away from being largely a funding body towards using its resources in a more strategic and developmental way, the Council has identified three central objectives for the plan: (a) to promote artistic excellence and innovation, (b) to develop participation in and audiences for the arts and (c) to build capacity in the arts sector. These inter-related objectives are to be implemented through twelve "strategies". So, for example, to build capacity in the arts sector, the Council will, among other actions, "improve local structures for the arts." In the context of film, this results in its commitment to "undertaking research, in co-operation with others, into more effective means of providing for film exhibition locally."

The fact that a range of partnership organisations has commissioned this particular study indicates a challenging complementarity in the Arts Council's relationship with other players that needs to be examined. As the King report puts it, the "context of film in the State has changed radically from the time the Arts Council began supporting film."

In this regard, conclusions contained in the Final Report of the Government's Film Industry Strategic Review Group[5] are relevant. Throughout that report there are numerous references to cultural expression and the power and influence of film. The Review Group explicitly identifies the need to foster a vibrant Irish film culture and in this context "believes that the Arts Council should encourage opportunities for expression and experimentation in film as an art form and should expand as far as is practicable the number of centres where high quality films can be shown"[6].

It is relevant here that the Review Group "saw no advantage at this stage in centralising all functions under one agency." However, it does say, "it is clear that a higher level of co-ordination will be needed to implement the strategic direction recommended." It further asserts that it "also believes that all agencies concerned with film should act in concert with the Irish Film Board and the industry."

It is clear that specific roles, relationships and responsibilities need to be more clearly defined as a first crucial step in constructing an efficient framework on which future cultural cinema development will depend.

A wider context for this issue is provided by the current review by the Department of Arts, Heritage, Gaeltacht and the Islands, which is being carried out with the aim of determining the principles and issues that need to be addressed in any new legislation to reflect the way we develop, support and understand the arts.

According to the discussion document, *Towards a new Framework for the Arts, A Review of Arts Legislation,* which was published in July 2000 to coincide with the launch of the public consultation phase of the process, the review will include an evaluation of existing governance and executive structures in support of the arts at local and national levels and will examine the need to restructure the existing arrangements to assist the future development of the arts in Ireland.

In Northern Ireland similar considerations have arisen around the roles of The Northern Ireland Arts Council and the Northern Ireland Film Commission. According to a recent major strategic review there[7], "this is a subject that calls for detailed discussions between the Council and the Commission to ensure that the boundaries between their respective, legitimate interests are clearly and sensitively defined and to avoid any risk that important forms of practice do not fall between two stools."[8]

[3]Arts Council's information document accompanying application form for funding under the scheme.
[4]The Arts Council has announced that in 2001 certain schemes, including film and video awards and the film exhibition project fund, will be superceded by improved systems of higher value awards, offering increased flexibility, clarity and simplification and a direct link to the strategies of The Arts Plan, 1999 - 2001
[5]The Strategic Development of the Irish Film and Television Industry 2000-2010, Final Report of the Film Industry Strategic Review Group, Department of Arts, Heritage, Gaeltacht and the Islands, (Dublin: The Stationery Office, 1999)
[6]ibid, p53
[7]Everett, Anthony and Jackson, Annabel, Opening Up the Arts, A Strategy Review for the Arts Council of Northern Ireland, http://artscouncil-ni.org/review/document.pdf. [8]The specific context for this remark was the issue of ensuring "that such areas as arts documentaries, 'artists' film and video' and community-based film and video are adequately catered for in the future."

3 | Introduction

3.4 The Changing Context

This study is being considered at a time of unprecedented economic development and growth in Ireland. The arts have also benefited in the current economic climate with the Government committing itself to increasing funding for The Arts Council during the life of the current *Arts Plan* from an annual level of IR£28 million in 1999 to IR£37.5 million in 2001.

There is also an increasing emphasis on promoting the development of the arts at local and national level. Over the period of the first plan, local authorities increased their support for the arts, but it was an improvement from a very low base and, in contrast with experiences in other countries, local authority spend on the arts is still low in comparison with support from central government. One of the key elements of the current Arts Plan is strategic partnership between The Arts Council, the State, the arts sector, local authorities and other key players to maximise the effect of the arts at local level.

There is recognition in government circles that a "time of prosperity is the time to invest in our future, in cultural infrastructure as well as economic and social infrastructure"[9]. In May 2000 the Department of Arts, Heritage, Gaeltacht and the Islands announced a new grant application scheme, the Arts & Culture Capital Enhancement Support Scheme (ACCESS). Funding of IR£36 million under the scheme will be available to approved projects over the period 2001-2004.

The scheme will primarily assist the development of arts and culture infrastructure and, in particular, integrated arts centres, theatres, museums and galleries as well as arts studios and other arts production, creative and performance spaces.

The announcement of this scheme represents a significant opportunity for those individuals and organisations interested in the development of cultural cinema in Ireland.

3.5 Approach to the Report

Our general approach to the report was designed to address the terms of reference as outlined in Appendix I and was cognisant of the methodology proposed there.

We have taken fully into account the fact that, if investment of public monies is contemplated, the twin key assumptions underpinning *Succeeding Better*[10] are pertinent: While "expenditure on the arts must be primarily evaluated in terms of the artistic objectives that are set," it is nonetheless "essential that (this expenditure) is guided by the principle of attempting the most effective allocation of scarce economic resources".

In the context of ensuring that resources are efficiently and effectively utilised, we recognise that significant responsibilities are involved, which commentator Fintan O'Toole, for example, has framed in questions such as: "Is money spent properly? Are choices being made in accordance with clear criteria and a vigorous sense of purpose? Are the fruits of public money equally available to all citizens?"[11]

A wide range of topics arose during the consultation process, many of which will necessitate a process of ongoing appraisal and examination if they are to be adequately dealt with. We have attempted to highlight such topics and to identify clearly matters of most immediate concern. In particular, we have sought to address fundamental issues that have to be faced if a framework capable of supporting further development is to be established.

Our account of the overall state of mainstream film exhibition in Ireland does not purport to be comprehensive. Rather, it seeks to identify key trends and to highlight what we consider are aspects of the bigger picture that are most pertinent to our concerns.

We have not individually documented all of the extensive interviews that we conducted with the people and organisations listed in Appendix X. However, all of the experiences and views shared with us in the course of these interviews played a role in influencing our thinking and framing our analysis of the challenges that have to be most urgently addressed.

Before we began, the commissioning consortium accepted some limitations to the scope of this study on grounds of budgetary constraints. With regard to offering estimates of the costs of converting or erecting cinema buildings, it will not feasible for us to assess venues that are not in their existing form physically viable for use as cinemas. Nor will it be feasible to make assessments requiring input from, for example, architects or quantity surveyors. Such work would necessitate a project in itself.

[9] *Síle deValera, Minister for Arts, Heritage, Gaeltacht and the Islands, Arts at the centre of social development (The Irish Times, Thursday, July 29, 1999).*
[10] *Indecon International Economic Consultants in association with PricewaterhouseCoopers, Succeeding Better: Report of the Strategic Review of the Arts Plan 1995 - 1998 (Dublin: The Stationery Office, 1998).*
[11] *From a presentation to Arts Council Consultative Forum, Limerick 19 June 1998. Quoted in Succeeding Better.*

3 | Introduction

3.6 Research and Information

Fundamental problems persistently arose in the course of researching and compiling this report because of the lack of previous research and any type of database detailing aspects of the operation of cultural cinemas or film festivals in Ireland.

Some useful if limited insight into mainstream exhibition was offered by audience and admissions statistics that are increasingly being made more available by a healthy and confident business sector keen to promote itself.

For example, the "on-screen" cinema advertising contractor for about 97% of screens in Ireland, Carlton Screen Advertising, is a leader in commissioning market analysis to support its sales division and publishes selected audience and box office data in order to promote a positive image of the mainstream cinema sector[12]

The cultural cinema sector has much to learn from this approach. Data on the cultural cinema audience are virtually non-existent in Ireland, and even in the UK is "sketchy at best"[13], with inconsistent data coming from alternative sources. For example, CAVIAR (Cinema and Video Industries Audience Research) in 1999 suggested that the age profile for art house cinema is predominantly older (44% in the 45+ age group). However, a "limited picture"[14], which the British Film Institute (the *bfi*) has constructed from Dodona Research combined with specific research projects from the National Film Theatre, the London Film Festival and selected Regional Film Theatres, suggests that the age profile is actually spread more evenly across all age groups, with 34% of the specialised cinema audience in the 25-34 age group and only 20% in the 45+ age group. Anecdotal evidence offered by interviewees during the consultation process for this study suggests that in Ireland the age profile of the cultural cinema audience is much closer to the *bfi's* more encouraging conclusions than the more questionable CAVIAR data.

Research is too expensive for cultural venues to commission individually. Consequently, in order to support audience development and the identification of gaps and opportunities, exhibitors — including film festivals — must begin to work together in partnership to create cost-effective and consistent research and information building initiatives.

[12] *For example, see www.medialive.ie/Cinema/cinema.html*
[13] *Brett, Paul, UK-Wide Cinema Exhibition Strategy Consultation Document (British Film Institute, June 1999).*
[14] *ibid.*

4 | Current provision

4.1 Introduction

Commercial cinema exhibition has been going through a period of extraordinary growth fuelled by high levels of investment in new multiplex development and programmes of renovation and multi-screening of older cinemas throughout Ireland.

Conversely, with the outstanding exception of the Irish Film Centre (IFC) Cinemas in Dublin (which are an integral part of a centre that also houses a specialist film bookshop and library, the Irish Film Archive, fiieducation as well as a bar and restaurant), and notwithstanding the emergence of a notable regional pioneer, the Kino Cinema in Cork, developments in the cultural cinema sector in Ireland, North and South, can be said to have been modest in aspiration as well as seriously under resourced in both financial and human terms.

4.2 Current Provision

In the entire island of Ireland only four cinemas currently operate on a full-time basis as cultural cinemas: Belfast's Queen's Film Theatre (QFT), Cork's regional pioneer, Kino, and, in Dublin, the IFC Cinemas and the Screen Cinema. A noteworthy part-time venue, the Cinematek, operates in the Triskel Arts Centre in Cork.

Full-Time and Part-Time Cultural Cinemas

Full-Time Venues	Number of Screens	Total Seats	Seats in each screen	Average Number of Screenings per week
IFC Cinemas, Dublin	2	375	260/115	56*
Kino Cinema, Cork	1	188	188	28
QFT, Belfast	2	400	250/150	28
Screen Cinema, Dublin	3	779	334/240/205	84
Part-Time Venues †				
Cinematek, Cork (four days per week for limited seasons)	1	77	77	8

**Average number of weekly screenings does not reflect educational screenings or number of films screened (IFC Cinemas screen about four times as many titles each year as comparable commercial exhibitors). † Orchard Cinema, Derry, which closed in November 2000, was also a part-time venue.*

4 | Current provision

In these circumstances, progressively more successful regional festivals in Cork, Galway and Derry, as well as the member societies of the Federation of Irish Film Societies, continue to provide valuable but limited opportunities for audiences outside of Dublin to see a range of Irish and worldwide cinema not supported by the commercial cinema sector. In addition to strengthening this activity there is a pressing need to extend it by providing permanent facilities for viewing and disseminating films from every source and each period of cinema's history.

The rest of this section offers short descriptions of existing individual cultural cinema initiatives. An audit of a regional sector that clearly has not enjoyed the benefit of the level of capital investment necessary to provide the type of first-rate facilities it needs would be invidious. Our account is emphatically not intended as such. The aim is to initiate discussion on crucial matters affecting sustainable future development with a view to identifying the practical and imaginative challenges the regional cultural exhibition sector faces.

4.2.1 Full-Time Venues

Irish Film Centre Cinemas, Dublin

Irish Film Centre Cinemas' two screens are housed in the Irish Film Centre (IFC) building, which is in public ownership, in Dublin's Temple Bar quarter. The IFC, which is also home to a number of independent film organisations, was built with the aid of capital funding from The Arts Council and with European Structural Funds through Bord Fáilte. The Film Institute of Ireland (FII), a not-for-profit organisation that is financed through a mix of Arts Council funding, earned income and fund raising, manages the centre.

The FII operate the centre's specialist film bookshop and library as well as its bar and restaurant, in addition to managing and programming the cinemas and running the Irish Film Archive and fiieducation, which the centre also houses.

IFC Cinemas, operating as a club and screening almost all of its uncertified films exclusively for members and guests[15], presents an extensive continuous programme of new releases, retrospectives, festivals and special events. It is a member of the Europa Cinemas network, which promotes European film with support from the MEDIA programme of the European Community.

Irish Film Centre Cinemas will be examined more fully in Section 4 in the context of establishing evaluation criteria for sustainable future development.

Kino Cinema, Cork

The privately owned Kino opened in November 1996 in a good location in Cork city centre. It received an initial grant of IR£100,000 through the CDIS[16]. The rest of the finance involved was raised privately. Kino is not in receipt of ongoing public funding.

Kino is owned and operated by Michael Hannigan, who is also Director of the Cork Film Festival, and a small team who have been breaking new ground in offering Cork audiences a broader range of Irish and world cinema.

Kino's screenings of certified films are open to the public but it also operates as a club, since many of its films have previously played in Ireland only at the IFC Cinemas and are uncertified.

Constrained by only one screen, but with afternoon as well as nightly screenings, Kino extends the range of its programme by scheduling two or three different titles in the available time slots and changing its programme fortnightly. Kino alternates this approach with longer runs of the most successful (in terms of audience appeal) art house films – hits such as *Life is Beautiful*, for example, upon which the fragile economy of the cinema depends.

Kino operates a small coffee dock that provides ambience and adds value to the film-going experience but, since space is limited, does not have the potential to generate significant additional revenue.

While distributors occasionally pay (as they routinely do in the mainstream sector) for larger-scale newspaper advertisements for particular films — or at least share the cost of such advertising with Kino — press advertising is normally limited to daily display advertising in the *Irish Examiner.*

[15] *Further discussion about the possible implications of certification is detailed later.*
[16] *CDIS - Cultural Development Incentive Scheme, an initiative of the EU Commission administered through the Department of Arts, Heritage, Gaeltacht and the Islands.*

4 | Current provision

Budgetary constraints, which impact on staff and other resource levels, mean that Kino is unable to produce a regular programme brochure to inform its audience and encourage pre-planned entertainment, nor has it the resources to develop website support for programming, with the potential for online booking and direct cinema to customer e-mail marketing.

Kino uniquely represents pioneering regional cultural cinema development in Ireland. It resulted from bold private enterprise and, understandably, detailed financial information about its box-office and operating costs is not available for publication. Nevertheless, it would be reasonable to infer, without prejudicing Kino's position, that meeting the challenge of further developing its potential will require a level of capital investment in refurbishment and for essential upgrading of technical facilities that Kino could not be expected to deliver from current operating surpluses.

Queen's Film Theatre, Belfast

Queen's Film Theatre (QFT), a two-screen cinema, is the longest-running art house on the island. Set up in the late 1960s, the cinema is owned and the staff is employed directly by The Queen's University of Belfast.

The cinema is located in south Belfast and though accessible in terms of public and private transport, the actual location on University Square Mews — down a lane — makes it invisible from the street and difficult to find.

QFT, which is not restricted to operating on a club basis, is open in the evenings and screens between two and four films per night. Films usually play for limited runs of one to two weeks.

While the core programming is solidly art house the cinema has tried to mix this with more-mainstream films that may also be screening at city centre multiplexes. The cinema occasionally offers other programme activities such as visiting filmmakers but does not include an explicit educational programme.

Technical facilities in terms of projection and sound are good (both cinemas have Dolby stereo) but there is little social space and no room for a café/bar. While seating is comfortable the overall feel of the cinema is somewhat dated.

Marketing consists of a monthly colour programme brochure, which is circulated to members (membership offers additional benefits but is not required to go to the cinema), and is also available around Belfast city centre. The cinema has a daily advertising listing in the Belfast Telegraph and the Irish News and when distributors contribute to the cost is able to place larger display ads for individual films. The venue also has its own website listing films and including some programme notes. However, budgetary constraints have impeded the development of its full potential.

QFT's funders are The Queen's University of Belfast, Belfast City Council, Northern Ireland Film Commission, the British Film Institute and Europa Cinemas.

The cinema has had highs and lows over its long history but recently has suffered from falling attendances, a trend that it is actively working to reverse

Queen's University has appointed additional staff to support the Director particularly in the area of marketing. Longer-term plans to build a new cinema complex in a more-favourable location are under consideration by the university.

Screen Cinema, Dublin

The Screen Cinema is located in Dublin City Centre and is readily accessible by public and private transport. It is part of the Ward Anderson chain of cinemas (the Screen is its only art house), which is the most extensive in the country with cinemas both North and South.

The Screen is open to the public and does not operate any type of membership scheme (making it unique in art house terms in the Republic of Ireland). It is run on an entirely commercial basis and, with judicious use of its three screens, exploits its niche market by playing certified, mainly English language and — increasingly rarely — some foreign language films on open-ended runs that allow more-successful films to reach as wide an audience as possible.

4 | Current provision

The Screen has supported festival activity in the past. It was the venue for the Dublin Film Festival for 13 years and, in more recent years, hosted the French Film Festival. However, its involvement with both of these events has now come to an end. Currently, occasional preview screenings and public interviews with filmmakers offer limited programme enhancement activity.

Capital investment in refurbishment and technical upgrading of the cinemas' sound systems has been a facet of the operation. The venue has a concessionary stand selling sweets, soft drinks and ice cream but does not have a bar or coffee shop or anywhere for patrons to sit down.

The cinema does not produce a brochure or printed information on its films apart from listings of current programme titles and times. However, the Screen is featured on the Ward-Anderson cinemas' website (http://www.filminfo.net) with the facility for direct to customer weekly e-mailing of the screens' programmes.

Significant economies of scale are available in terms of press advertising since the Screen, as part of a chain, benefits from block bookings for the chain, which in the Dublin area includes the Savoy, the Santry Omniplex and IMC Dun Laoghaire. These large block ads are placed in *The Irish Times*, the *Irish Independent* and the *Evening Herald*.

Additionally, because films at the Screen are expected to appeal to a relatively wide audience, they are usually supported by larger advertising campaigns paid for by distributors.

4.2.2 Part-Time Venues

Cinematek at Triskel

Cinematek is a cinema club operated by Triskel Arts Centre, a not-for-profit multi-disciplinary cultural venue in Cork city centre. Triskel, which has a history of commitment to film as an artform, is a client of The Arts Council and is in receipt of ongoing revenue funding that supports a portfolio of visual arts, theatre, music and education activity and includes providing a forum for new and innovative work in film, video, sound and performance. Installation of 35 mm projection facilities with a mono sound system has made it possible for Triskel's full-time Film and Music Programmer to expand its film programme.

Building on previous film activity at Triskel, Cinematek now presents films twice daily, normally for 4 days from Wednesdays each week over limited seasons (there are no screenings during the summer months, for example). An artistically-ambitious programming policy is characterised as "cutting edge" and aims to show films not being seen at the Kino (and, regularly, not being seen in any Irish cinemas outside of festivals). Repertory screenings of films already shown in local multiplexes or at the Kino in addition to the main programme of "riskier" art house titles such as *L'Humanité* and *I Could Read the Sky* is a newer feature of the programme.

Cinematek is a member society of the Federation of Irish Film Societies (FIFS). However, unlike other member societies, which are run by volunteer committees, Cinematek is managed and programmed by a full-time professional arts administrator supported by other Triskel staff, including a press and public relations officer.

Cinematek represents an interesting collaboration between the FIFS and an arts centre, but absence of adequate data on attendance numbers and patterns made it impossible to assess fully the extent to which either the partnership or Cinematek's approach to programming might serve as a model for cultural film exhibition in other venues.

Arts Centres

Increasingly, arts centres now wish to include film screenings in their portfolio of activities[17]. The focus has until recently been on the installation of 35 mm projection systems.

To date societies utilise 35 mm facilities in three arts centres: the Cinematek in the Triskel Arts Centre in Cork, Sligo Film Society in the Model Arts and Niland Gallery in Sligo and Waterford Film Society in Garter Lane Arts Centre in Waterford.

Galway Film Society screens in the Town Hall Theatre in Galway and Sulan Film Society (Macroom in Cork) now screens in Briery Gap in Macroom. Changing to 35 mm, with the subsequent increase in facilities, has seen a growth in audience numbers at these venues. Volunteers programme all of the societies except the Cinematek.

[17] *Appendix III lists Arts Centres which have expressed interest in investing in 35 mm screening facilities.*

4 | Current provision

Cinematek is significantly different and in many respects could not be classified as a society in the historical sense, as it is not programmed by a group of volunteers but by a salaried film officer. There is a significantly higher level of activity compared to normal film societies as films are screened twice daily for four days a week (no screenings during the summer months) compared to just one screening per week or fortnight for the other societies.

The inclusion of screening facilities within arts centres raises questions about the levels of programming needed to justify the investment required for 35 mm and or digital screening facilities as well as increased public funding. It is unlikely that the level of commitment involved could be made solely by volunteers but will require paid personnel.

In speaking with directors of arts centres for this study, gaps in experience and knowledge about film exhibition and distribution were evident but keen interest in developing the very real potential for screening facilities in arts centres is even more obvious.

4.3 Resource Organisations

Federation of Irish Film Societies

The Federation of Irish Film Societies (FIFS) was established in 1977 to act as an umbrella organisation for volunteer film societies throughout the country. Societies, programme a broad range of films in areas where specialised cinema would not normally be available. The FIFS represents a broader regional constituency than any other film organisation in the South and is a long-time client of The Arts Council/An Chomhairle Ealaíon.

FIFS provides a centralised booking agency for members from its office in the Irish Film Centre in Dublin. The FIFS central office books films on behalf of the individual societies who present films during two seasons a year, usually winter and spring. The office books films three to six months in advance so that societies can offer a package of films to members at the beginning of each season. It is important to emphasise that the central office does not have the authority to book society venues as a circuit. While the Director advises and can influence decisions, it is the individual societies which make programming choices, usually by committee.

The Federation's member societies operate in a wide range of venues, from rooms in pubs or hotels, to community halls and arts centres. Five societies now operate in venues that have installed 35 mm projection systems, improving the quality of their presentation and adding greatly to their appeal.

A list of current societies is included as Appendix II to this report and it is clear that 16 mm film — historically the format used almost exclusively by regional societies — and the vexed question of print availability are giving way to the use of video in situations where 35 mm installations are unfeasible.

This presents a considerable challenge to the Federation in terms of maintaining acceptable standards of presentation and avoiding the use of display technologies that suffer to an unacceptable degree from the limitations of conventional video image processing.

As video projection continues to improve and advances are made in the quality of large-scale video displays, it will be important to monitor developments with the emphasis on establishing criteria for acceptable standards in terms of quality, while also recognising the cost implications. In the short term, high-tech systems suitable for smaller venues that are capable of presenting images not only with the smooth, line-free appearance of film but with film's clarity and resolution will remain expensive.

New opportunities to explore working relationships and strategic partnerships with arts centres and community projects are likely to emerge. New players will appear (as has already happened with arts centres in Waterford and Sligo and the new community cultural centre in Macroom[18], which are already equipped with 35 mm projection facilities) and new demands will be made for technical support and for programming and booking services (as opposed to simply booking, which is the Federation's historical role) extending beyond conventional film society seasons. Operational restructuring and a newly defined broader role will have to be considered if the Federation is to be able to meet these new challenges.

[18] *Setting new standards for community cultural projects, Briery Gap Cultural Centre in Macroom is equipped with new Christie 35 mm projection equipment and a high-quality Dolby four-channel sound system that enables it to extend its activity portfolio, which includes theatre and music, to serving as a part-time rural community cinema www.macroom.ie/community/briary/briary_index.html).*

4 | Current provision

4.4 Film Festivals

The Arts Council has also supported a number of festival initiatives through the Film Exhibition Project Fund. The Darklight Digital Film Festival at the IFC in Dublin received funding in 1999 and 2000 as did the Fresh Film Festival for Young People in Limerick. The Dublin Lesbian and Gay Festival, now in its eighth year, received funding again for the 2000 festival. There was also a new initiative on the part of The Irish Film Board and The Arts Council with the development of Doclands Film Festival (focusing on documentaries) held in Dublin for the first time in October 2000.

The NIFC also supports the Cinemagic International Film Festival for Young People. Cinemagic is significantly different from the other festivals listed because it is the only one with substantial year round activities. Started as a film festival in 1989 it has now established satellite projects in towns across Northern Ireland and goes on tour in the UK. Activities include: an Outreach Programme which aims to give young people access to film screenings and an insight into the film-making process; a film production unit which allows young people the opportunity to make films; an information and resource centre, providing advice on international films for children and young people to organisations worldwide and a training centre, offering formal and informal training in event management and cultural film programming.

Cinemagic also participates in The Real to Reel Project, a cross-border partnership between Cinemagic and the Droichead Arts Centre in Drogheda.

As a result of Arts Council and NIFC support, the potential for regional development has most fully been realised in terms of film festivals with all festivals outside Dublin succeeding in making significant improvements and serious local impact.

4.5 Other Initiatives

Cinemobile^

Ireland's first travelling cinema, the Cinemobile, which has a capacity to transform into an air-conditioned 100-seater cinema, will take to the road early in 2001 to visit communities all over the island. Owned by Fís na Mílaoise Teo, a wholly-owned subsidiary of The Film Institute of Ireland, Cinemobile 2001 is funded by the Millennium Committee of the Irish Government and, to date, RTÉ, The Arts Council and The Irish Film Board.

Ward Anderson Circuit

Multiplexes both in the UK and Ireland have often declared their interest in extending the range of films on offer and have often promised that they will dedicate a screen to non-mainstream film. This has generally not happened to any great extent.

^A local initiative of Leitrim County Council is Aisling Gheal Liatroma which intends to programme cinema in its cinemobile

Film Festivals currently receiving ongoing revenue funding

Festival	Audience	Funders
Cork Film Festival*	General	The Arts Council/An Chomhairle Ealaíon
Dublin Film Festival	General	The Arts Council/An Chomhairle Ealaíon
Galway Film Fleadh	General	The Arts Council/An Chomhairle Ealaíon
Junior Dublin Film Festival	Aimed at young people	The Arts Council/An Chomhairle Ealaíon
Junior Galway Film Fleadh	Aimed at young people	The Arts Council/An Chomhairle Ealaíon
Cinemagic, Belfast	Aimed at young people	Northern Ireland Film Commission
Foyle Film Festival, Derry*	General	Northern Ireland Film Commission
1st Belfast Film Festival**	General	Northern Ireland Film Commission

**Both the Cork and Foyle Film Festivals also include a programme aimed at young people.*
*** Developed from the West Belfast Film Festival, the first Belfast Film Festival was held in September 2000, to become the first city-wide film festival.*

4 | Current provision

However, the desire on the part of multiplexes to broaden their audience base suggests that they may be more open to this type of programming in the future[19]

In Ireland, the Ward Anderson chain has attempted to programme non-mainstream material once weekly in a Screened and Unscreened programming strand. The initiative is modest in ambition, featuring mostly English-language films, with screenings in towns where there is no other or very little cultural cinema exhibition.

Although Paul Ward of Ward Anderson would like to develop Screened and Unscreened, he acknowledges that the close "week to week" attention needed to make such initiatives work is greater than can be justified in commercial terms, notwithstanding the audience-building potential involved.

Phoenix Cinema, Dingle
Dingle's 152 seat single screen Phoenix Cinema is particularly noteworthy for its long-term commitment to a weekly cinema club, which has been operating since 1989. Currently running on Tuesday nights, it brings films to Dingle that few commercial cinemas outside Dublin would risk *(The Straight Story, Run Lola Run, Magnolia)*. Michael O'Sullivan, who owns the cinema, would welcome additional support in the form of networking opportunities, which he currently informally gets from the Kino.

4.6 Conclusions on Current Provision

Overall developments in the sector have tended to be fragmentary and individual in nature, characterised by a lack of investment both in facilities and in human resources with the exception of IFC Cinemas. Developments have occurred without reference to an overall strategy and this has had a negative impact on the level of infrastructure and capacity in the sector.

The sector has not defined standards of "best practice" to underpin further growth. The answer to the question of who is best positioned to monitors and determines "best practice" is not clear.

At present, provision of cultural cinema operates at two levels. The FIFS and the arts centres provide access on a part-time basis during the year. There is significant scope for increase in provision particularly if arts centres have invested in new 35 mm or high-quality DVD video projection.

It is unclear where this new increase in provision will come from and whether arts centres will need to employ specific personnel to develop more cultural film activity. Equally the FIFS, made up of voluntary committees, is unlikely to be able to increase provision significantly. The fact that the FIFS works so far in advance of full-time venues makes co-ordination of prints difficult. Potential exists for more co-operation and collaboration between regional film festivals and arts centres to develop touring or specific individual programmes that would support increased film activity.

The second level of activity is that undertaken by the full-time venues. There is a high level of discrepancy between what is possible at the IFC Cinemas in Dublin when compared with the experiences of the other regional full-time venues, the Kino and the QFT. This is seen in terms of both programming and audience levels achieved as well as the screening environment and ancillary activities at the IFC.

The IFC experience is not reproducible elsewhere in its entirety. However, it could form the basis of a model of best practice and this is explored further in Section 6.

The issue of the challenge posed in providing adequate venues is highlighted by the decision to end the Nerve Centre's programming of the Orchard Cinema — a far from ideal venue — in Derry in November 2000. If it is not underpinned by a consensus on venue standards, audience development and significant new growth is unlikely to happen.

Any new initiatives or developments will have to be of sufficient quality if they are to have any chance of making a significant impact regionally. The fragmentary nature of developments to date which has negatively impacted on the sector's potential for growth suggests that for long term sustainability and viability new developments would benefit from inclusion in an overall network structure that could support them more fully.

[19]*Some information on new initiatives from the bfi in this regard is contained in Appendix V.*

5 | The Bigger Picture

5.1 Introduction

Existing art house cinemas already have to compete for audiences and contend with strong competitive forces. Equally, future cultural cinema projects will have to vie for attention in a wider cinema marketplace currently exuding success and media-attention-grabbing confidence. "Since the arrival of the modern blockbuster the jargon of the exhibition business has become part of the marketing hype. 'Opening weekends' and 'screen averages' are now commonly mentioned in reviewers' comments."[20]

The table opposite shows that in the last six years alone, from 1995 to the end of 2000, the number of cinema screens in Ireland grew by 57% to reach 310. Over the same period annual admissions increased by 51%, with the largest year-on-year increase - 20% - recorded in 2000.

This growth has been fuelled by high levels of investment in purpose-built multiplexes which charge higher prices and attract higher admissions. As a result of multiplex development, multiscreening (replacing older single screen cinemas in small towns with new ones) and closures of unsustainable single screen cinemas, there are now more screens in Ireland, but fewer cinema sites. In January 2001, 40% of cinemas in Ireland had six screens or more, as illustrated in the table opposite.

Republic of Ireland, Cinema Screens, Admissions and Box Office 1995 - 2000

	Screens	Admissions (million)	Box Office (IR£ million)
1995	197	9.84	27.60
1996	215	11.48	40.25
1997	243	11.49	40.25
1998	273	12.39	44.60
1999	308	12.41	47.20
2000	310	14.89	N/A

Source: Cinema Advertising Association, Irish Business and Employers Confederation, Dodona Research

Full-Time Cinemas in the Republic of Ireland and Northern Ireland by Number of Screens at January 2001.

Number of Screens per Cinema	Number of Cinemas	Total Screens	Total Seats
Fourteen	3	42	8395
Twelve	3	36	6645
Eleven	1	11	2020
Ten	3	30	7047
Nine	3	27	6900
Seven	9	63	9848
Six	15	90	16127
Five	6	30	5449
Four	15	60	11018
Three	11	33	5122
Two	14	28	4711
One	8	8	2220
	91	458	85502

Source: Light House

[20] *Linehan, Hugh, "Time to take on Tarzan and friends" (The Irish Times, October 30, 1999).*

5 | The Bigger Picture

5.2 Multiplex Exhibition

Multiplex is a term coined in America for a new generation of purpose-built cinemas offering superior technological features and viewing conditions, with computerised ticketing and dedicated car parking, often situated in suburban shopping malls with restaurant facilities.

Ireland's first multiplex, 12 screens situated in an outer suburban shopping complex in Tallaght in West Dublin, was opened by United Cinema International (a joint venture between the Hollywood studios Paramount and Universal) in November 1990. UCI quickly followed this successful opening with its second 10-screen complex to the North of the city in August 1991.

The Irish owned Ward-Anderson Group followed UCI's lead and opened their first multiplex, 10 screens at Santry in Dublin's northern suburbs, thus kick-starting an extensive investment programme of renovating and multi-screening older cinemas throughout Ireland or replacing them with new ones.

Recent notable developments in the market include the arrival of Ster Century, the European arm of South African exhibitor Ster Kinekor, which opened the first of its European multiplexes, a 14-screen site in the Liffey Valley Shopping Centre in West Dublin, in July 1999.

A European dimension was introduced when UGC, one of France's most powerful domestic exhibitors, bought the Virgin Cinema chain, including its Dublin and Belfast sites, in October 1999 (bringing UGC's European portfolio to 81 cinemas housing 677 screens across France, Belgium, the UK and Ireland[21]).

5.3 Changing Release Strategies

The proliferation of screens throughout Ireland has had a significant effect on how films are released. A higher screen density facilitates – and depends for its own sustainability upon – particular distribution strategies. Films now typically play for a much shorter time than before. But in that shorter time a film has the potential to reach more people than ever.

Success in this regard has been contingent upon the extent to which multiplex operational strategies and mainstream distribution tactics support each other in stimulating higher frequency of attendance which is a crucial factor in driving overall admission figures higher.

It makes sound economic sense for the major global corporations which dominate Irish distribution – and have the strategic advantage of co-ordinated promotional campaigns across large numbers of countries – to invest heavily in prints and advertising (P&A) to support wide releases.

With significant marketing budgets being expended speedily at the front end of a film's release, the mainstream exhibition environment thus created is one in which the box-office take of a film in its opening weekend determines its fate. Despite the increase in the number of screens, it is often difficult to hold over films – even those that are performing relatively well – for more than a few weeks, simply because of the volume of product competing for space in the marketplace.

Only ten cinemas in Ireland (five of which are in the Greater Dublin area and two in Belfast) have ten or more screens. Consequently, only a handful of commercial Irish exhibitors outside Dublin and Belfast have the capacity to play anything more than the small number of highest-earning titles available. In these circumstances, there is simply no space for films with a more-limited appeal. In the larger complexes with more screens, particularly in the Dublin area, popular blockbusters regularly occupy more than one of the available screens.

This has significant implications for films seen as having only limited or specialist audience appeal. If a film is considered to be too risky to justify a large P&A investment then it has no chance of reaching a wide multiplex audience. On the other hand, a major distributor with enough confidence in a product to back it with financial support can turn artistically ambitious movies, such as *The Talented Mr Ripley* or *American Beauty*, into events that audiences feel they cannot afford to miss.

[21] *Screen International, March 3, 2000*

5 | The Bigger Picture

5.4 Audience Profiles

That a global industry is now interested in exploiting niche markets with films like *American Beauty* is not that surprising. An American survey by film industry analysts AC Nielson EDI highlights the extent to which the preferences of a 'heavy user' group, dominated by 16-24 year olds, "drive the success of the motion picture industry." The study concludes: "An important growth strategy for studios and exhibitors is attracting a broader group of Americans over the age of 24." [22]

In Ireland, research on media consumption, until now[23], has tended to look at audiences from the age of 15 upwards. The most recently published Joint National Readership Research (JNRR) Survey carried out by Lansdowne Market Research for its clients offered this profile of the Irish cinema audience, weighted to the adult population (15+) of the Republic of Ireland: (see opposite)

Cinema Audience in the Republic of Ireland (15+) by Age and % of Population (15+)

	% of Population aged 15+	Cinema Audience %
Sex		
Male	49	52
Female	51	48
Social Class		
Adults ABC1	36	46
Adults C2DE	51	48
Age		
15-24	23	53
25-34	19	27
35+	58	20
15-19	12	29
20-24	11	24
15-34	42	80

Source JNRR/Lansdowne 1999/2000

[22]ACNielsonEDI. News Release Los Angeles, March 9, 1999, www.entdata.com/about/release/showest.html.

[23]As a result of the success of 'family films' like Toy Story 2 (the second-highest grossing film at the Irish box-office last year), Carlton Screen Advertising, according to a report in The Irish Times on January 25, 2001 are "'currently increasing investment into research so that we can get an accurate idea of who makes up our younger audiences".

5 | The Bigger Picture

Frequency of Visiting, Republic of Ireland

All Adults		Sex		Age			Social Class	
Total		Male	Female	15-24	25-34	35+	ABC1	C2DE
	%	%	%	%	%	%	%	%
Weekly +	3	3	3	10	2	1	3	4
2-3 times a month	9	10	7	21	14	2	11	8
Once a month	12	11	12	24	19	4	16	10
Once every 2-3 months	12	11	13	20	18	7	16	10
2-3 times a year	10	10	10	11	10	10	12	10
Less often	13	12	13	6	13	15	14	13
Never Go	42	42	41	8	23	61	28	45

Source JNRR/Lansdowne 1999/2000

This profile is supported by data on frequency of attendance which, notwithstanding the growth in regular cinema-going across all age groups, further illustrates the extent to which the most regular cinema-goers belong to the 15 –24 age group

5.5 Lessons from the Multiplex

Multiplex and multiscreen developments have completely revitalised the commercial exhibition sector in Ireland. While short-term fluctuations in the cinema audience can be attributed to the success of specific films, the overall trend has been one of phenomenal growth in admissions as a direct result of sustained investment in new screens and superior technical facilities.

A crucial aspect of this was highlighted by John Wilkinson, head of the Cinema Exhibitor's Association (CEA) in the UK, when he said: "The Point (the UK's first multiplex) brought together a lot of ideas in one place so they were easy to spot and pick up by people who weren't trying them. The multiplexes did stimulate the market because they made all other exhibitors realise that they had to improve."[24]

In Ireland, Leo Ward, joint owner of the indigenous Ward Anderson group, acknowledges that improving facilities in his chain of cinemas has driven up demand and turnover: 'Where we might have taken £3,000 on a film in our old cinema in Killarney, now we would take £12,000.'[25]

The importance of the multiplex phenomenon is not only practical but also psychological. As David Puttnam observed in the UK: "The influence of the multiplexes had as much to do with the way in which they created an image of modernity and confidence for Britain's once ailing exhibition sector."[26]

The challenge now facing the cultural cinema sector is to follow the example set by multiplex exhibitors and pursue confidence-building investment that will support a sustained commitment to higher standards of presentation and improved viewing conditions.

[24] Quoted by Stuart Hanson, 'Spoilt for Choice? Multiplexes in the 90s' in Robert Murphy (ed) British Cinema of the 90s (London: British Film Institute, 2000) [25] Quoted in The Irish Times, May 15, 1998.
[26] David Puttnam with Neil Watson, The Undeclared War, The Struggle for Control of the World's Film Industry (London: Harper Collins, 1997).

5 | The Bigger Picture

5.6 Digital Cinema

Just as digital cameras and desktop editing packages have opened up production and post production opportunities for independent film-makers, so digital projection is mooted as a way for them to influence exhibition. The new technology's utopian promise is of a cinema from all around the world on tap, piped through existing phone lines or via satellite, showing at local cinemas for a fraction of the cost of celluloid.

But it is major US technological and film industry players that are investing in the research and development of "the ultimate Digital Cinema Application - complete electronic replacement of film prints as a means to distribute first run feature films to any theatre in the world."[27]

Digitally projected images — clear or clearer than 35 mm film, with none of the scratches, dirt or jitter that infect even the most pristine of celluloid prints — has become the promise held out by proponents of digital technology. They predict that development of digital systems will lead to changes more far-reaching than any in the movie industry since the implementation of sound equipment in the 1920s.

In late June 1999 the new system went on display in Los Angeles, New Jersey and New York, in cinemas showing *Star Wars: Episode I-The Phantom Menace* and *An Ideal Husband*. Disney's digital *Tarzan* debuted about a month later in July. When *Toy Story 2* was released on 35 mm in the UK in February 2000, it was also distributed in digital format to one Manchester cinema and two in London that have installed prototype digital projection technology. As the reach of field tests of digital projection systems is extended we are increasingly compelled to consider more than the probability of digital cinema completely replacing existing systems. The real question therefore becomes, how long will the transition take?

Meanwhile, one of Hollywood's strongest proponents of technological change, George Lucas, came closer to his goal of an entirely digital production last October by completing principal photography on *Star Wars*: Episode II using a new high-end camera created for him by Sony and Panavision that replicates the familiar look and feel of film's 24 frames-per-second.

However, as is always the case with new technologies, the need for uniform industry standards and the absence of full-scale manufacturing is impeding development of digital distribution and exhibition equipment, which means that, in the short term at least, the hardware will remain expensive: current estimates range from $100,000 to $130,000 per screen. However, as the market matures, costs are likely to drop.

Before the transition can proceed, many issues will have to be resolved. Among them are the minimum requirements for digital projectors, compression and encryption technologies and methods of delivery to cinemas. It is expected that, in the next two years, the US-based Society of Motion Picture and Television Engineers (SMPTE) will reach agreement on industry standards, thus prompting further development and implementation of digital systems.

Looming over all the discussions is the biggest question of all: who will pay for the expensive transition to digital technology in theatres and movie studios? Notwithstanding the promise of extra revenue from the screening of live digitally transmitted concerts, sports and other events, big exhibitors, who have already invested large amounts of money in multiplexes over the past decade, argue that the studios stand to profit most from the new system and so should bear the cost.

The principal potential economic benefit of digital cinema is the saving of film print and distribution costs. While it is distributors that will primarily benefit from these savings, the investment in new digital projection systems must be made at the point of exhibition. The issue will not be resolved easily. Some studios may indeed calculate that the advantages of digital are sufficiently great to warrant investment now. For Example, Disney, with its particular commitment to digital productions such as *Toy Story* and *Toy Story 2*, plans to stand behind movie theatre operators in the push toward digital conversion and is developing strategies to assist with the changeover.

The company is actively involved in working with outside sources towards developing a worldwide standard in digital projection and negotiating business proposals to pay a proportionate-to-profit share of the costs related to conversion.

[27] *Steven A. Morley, Vice President, Technology, Qualcomm Incorporated, Making Digital Cinema Actually Happen - What it Takes and Who's Going to Do It. (SMPTE Technical Conference paper, October 31, 1998).*

5 | The Bigger Picture

In the longer term, once digital projection makes significant inroads, film laboratories such as Technicolor will find it difficult to sustain viable operations, since most of their profits come from massive theatrical print orders. If the future of laboratories comes under threat, Hollywood companies will inevitably turn to digital cameras for original photography.

The transition to digital projection will not happen overnight. The industry has yet to decide which system to adopt, and that will require much negotiation and cooperation between the studios and exhibitors. Nonetheless, according to a new report[28] by the media analysts, Screen Digest, there are likely to be an estimated 10,000 digital screens worldwide by 2005 and a complete transition within 20 years. The report also predicts that almost 100 per cent of the major Hollywood studios' films will be available both in digital and conventional (35 mm) format by the end of 2004.

Notwithstanding the promise that digital technology holds out, electronic cinema and its implementation will be a costly and complex undertaking and film will coexist with digital for some considerable time. The process of changeover and the long-term consequences for exhibition in Ireland will have to be considered on an ongoing basis.

But this essential process of review must be introduced alongside — not instead of — progressing the development of regional cultural screening facilities using "conventional" projectors.

[28] *Screen Digest's report, Electronic Cinema: the Big Screen Goes Digital, was published in September 2000.*

6 | Developing Cultural Cinema

To underpin future development in cultural cinema facilities evaluation criteria will be required to inform assessment of viability and sustainability.

6.1 Evaluation Criteria

As an approach to highlighting key factors that will affect the viability of future projects we propose ranging a discussion around aspects of the Irish Film Centre (IFC) Cinemas with the aim of identifying what has accounted for their singular success and highlighting lessons that it offers.

Location

The IFC is located in Temple Bar in Dublin city centre which has been designated a major tourist destination venue for foreign and domestic visitors. The IFC acts as an anchor cultural project for Temple Bar, drawing people in and helping to revitalise the area while itself enjoying the benefits of its high-profile location. It is easily accessible by public and private transport.

In terms of its specific location on Eustace Street, there were initial concerns that the frontage of the cinema onto the street was poor and would affect its public visibility. A further concern was the tunnel like entrance. However, the IFC has overcome this to a great extent with signage, lighting and postering at the entrance.

Venue

The venue is not purpose built and the conversion of an old building from its former use demanded a level of capital investment that has not been available anywhere else in the cultural cinema sector in Ireland. The Arts Council and the European Structural Funds through Bord Failte provided the necessary capital investment.

The complex, which is also home to a number of independent film organisations funded by The Arts Council, is run by the Film Institute of Ireland (FII) and in addition to its two cinemas it incorporates a specialist film bookshop and library, the Irish Film Archive, fiieducation, as well as a bar and restaurant.

The importance of social space both as an attraction in itself, as a marketing tool for future films/events and as a means of generating revenue, should be stressed. This element of the IFC has worked particularly well after a somewhat shaky start and now contributes greatly to the atmosphere of the centre as well as maximising economic benefits.

The cinemas themselves are fitted out to high standards of comfort and compare most favourably with Dublin's multiplex cinemas. Capital investment by The Arts Council has ensured that both cinemas have benefited from an ongoing programme of refurbishment and technical upgrading. High technical standards are maintained and 35 mm (and 16 mm) projection is excellent with Dolby Digital sound systems in both cinemas. A 70 mm projection system has also been installed and at time of writing was due to be commissioned.

However, IFC Cinemas were not purpose built and suffer some drawbacks as a result. This has been recognised by the FII and key strategic actions required to deal with its problems were highlighted in their current five year plan. As a result, the replacement of screens and screen surrounds -— which was identified as a priority — has now taken place utilising Arts Council capital funding.

Programming

Operated as a club, IFC Cinemas offer a wide range of world, European and Irish cinemas. Films are shown in limited runs, generally for two to three weeks, and the programme consists of a mixture of first run films with special seasons, retrospectives and one off screenings.

The cinemas are open seven days a week from early afternoon with the latest screenings usually beginning between 8.30 pm and 9.00 pm.

More commercial art house programming is balanced against cultural considerations, aimed at challenging and extending audiences or building new audiences for material not screened elsewhere.

IFC Cinemas are not in receipt of direct revenue funding through The Arts Council but the centre itself receives a substantial grant from The Arts Council. Educational activities are also in receipt of ongoing revenue funding.

The cinemas also benefit directly through the provision of administrative, management and financial support from the centre which they would need to provide themselves were they a stand-alone venture.

6 | Developing Cultural Cinema

Competition

When the IFC opened in September 1992 there were five other commercial art house screens in Dublin, two at the Light House and three at the Screen. Consequently competition for titles was much stronger with the Light House and the Screen playing more-commercial titles for longer runs.

Since the closure of the Light House in September 1996 competition for films is rarely an issue. The Screen has firmly established a niche and plays certified, mainly English language art house material, usually for longer runs than the IFC can offer. In particular, this leaves a wide choice of sub-titled "foreign language" cinema available and much of this has proved popular with IFC audiences.

However, if another art house exhibitor were to enter the Dublin market in the future, the financial stakes involved would make intense competition for titles with the greatest box-office potential inevitable.

Film Availability

Overall cinema admission figures show that most admissions occur in Dublin and that frequency of attendance is also higher. While no specific data regarding admissions for art house are available we can assume that this is also true of this sector.

The importance of the Dublin market for distributors of art house means that it is prioritised in terms of print availability.[29] Access to prints for the IFC is now relatively easy; however, availability for regional cultural cinemas and the FIFS remains an issue.

Provision of prints as close to the release of a film in the major market, either Dublin or London, is important. The further away from the release the film becomes available the harder it is to generate good box office.

Screen Finance reported in September 1998 that 26% of a successful film's total gross income was earned in the first week of release. Box office dropped by an average of 24% between weeks one and two and by week ten the film's commercial life was essentially over.

The difficulty here is that, because the present provision of cultural cinema outside Dublin is so low, it makes little commercial sense for distributors to make a print available. The feasibility of leaving prints in the country after they have finished their run at the IFC or the Screen, or opening the film more widely in Ireland using prints that have finished their London runs, will depend on the number of venues and their capacity to generate box-office.

The current distribution pattern for art house films whereby London distributors are the key suppliers is unlikely to change in the immediate future. However, film distribution remains fluid and is often volatile with new entrants to the market all the time. Ongoing contact with distributors remains a crucial area for all exhibitors.

Unless access to films and in particular the more-commercial art house hits can be assured it is unlikely that any cinema operation will be viable. The IFC's success particularly in recent years in accessing a wide range of films, including the more commercial is one of the key reasons for its success.

Programme Enhancement Activities

Programme enhancement activities include those activities outside of the actual screening of films that add to and enhance the audience's enjoyment and understanding of film culture. It is these activities that distinguish cultural cinema, which has a larger remit from commercial art houses.

Programme enhancement activities at the IFC are particularly noteworthy and are undertaken by both the education and cinemas departments. fiieducation aims to promote film culture through a variety of programmes aimed at specific audiences while the cinema section continues this work through special seasons and retrospectives as well as providing access to film-makers and the larger film industry.

However these activities are expensive to operate and require expertise and commitment if they are to work successfully.

[29] *The release pattern for two of Artificial Eye's films shows that a print for Dublin is prioritised early in the run. See Appendix IV.*

6 | Developing Cultural Cinema

Management and Staff

Staff costs are usually the single largest component of a specialised cinema's operating expenditure. Staffing levels for the cinemas alone (information derived from Film Institute of Ireland's *Five Year Plan 1999/2003*) currently stand at 12. These include a cinema manager / programmer, an assistant cinema manager, a cinema publicity assistant, a second assistant, a senior projectionist plus two other projectionists and five box office/front-of-house staff.

The level of activity at the IFC is more than might be expected in other potential venues. However it is clear that staffing levels and the inclusion of trained experienced personnel is a key consideration for any cultural cinema operation.

Strong programming and management expertise in the cinema area are backed up by administrative and financial management support from the centre. This represents a significant benefit to the cinemas that would otherwise have to provide for this from their own resources.

Marketing

The commitment to marketing by IFC Cinemas is very evident and it is clear from the initiatives listed below that realistic budgets have been prioritised in this regard. The cinemas section also works in tandem with other departments in the centre, contributing to and benefiting from their marketing activities.

The main marketing tool is the free colour bi-monthly brochure, which is of a high production standard.

IFC Cinemas has recognised that the brochure requires input from experienced personnel who need to have the time and resources to research and produce programme notes. Adequate staffing levels allow for this.

The cinemas also place large daily ads (often 10cms x 1column) in *The Irish Times* and also in the *Evening Herald.* These compare favourably with advertisements placed by other film exhibitors ensuring an ongoing presence in the print media. Film distributors, identifying Dublin as the key market nationally, also place advertisements for their films thus reinforcing IFC Cinemas' own advertisements.

The IFC has recently upgraded its website, which now provides information on films and the various film programmes as well as useful links to other websites. The growing importance of the web and websites, as marketing tools cannot be over-stressed.

The IFC does not employ an overall marketing executive and each department is responsible for generating its own publicity with the cinemas section engaging a full-time person to do this. Targeting niche markets for certain films or refining marketing campaigns is now possible.

Conclusions

Building a quality cinema of appropriate screen numbers with high standards of presentation and projection, good levels of audience comfort in terms of seating and sight lines, in a environment that is relaxed with decent social space makes success more attainable.

Being able to programme and market films in a way that is exciting and immediate to audiences will also guarantee reasonable expectations of success.

This is not, however, to underestimate how difficult it can be to ensure that these conditions occur. Quality developments need capital investment and in the case of cultural cinemas, the bulk of this funding will need to come from public sources, either funding bodies like The Arts Council or the NIFC or through public/private partnerships with local authorities or more likely a combination of both.

Ongoing revenue funding will be required if the level of film activity that such a development demands is to be ensured. Issues around management, marketing, programming expertise and film availability will also need to be addressed. This level of cultural activity is expensive and will require ongoing commitment of funds and resources.

Underlying this is the assumption that public monies must be efficiently and effectively utilised. Potential future developments need to be examined to assess how well they can fulfil the key success criteria that have emerged.

A factor not included above but one that is important is the question of "ownership" of a venue.

Since cultural cinema initiatives are likely to be funded by public bodies it is important that they be seen to be "owned" in some way by the larger community if they are to be successful both in accessing funding and benefiting from continued local support.

The arguments for a film centre, particularly in light of the closure of the Irish Film Theatre in 1984, were articulated and supported by a constituency made up of film industry professionals, academics, film-makers and later, crucially, politicians.

6 | Developing Cultural Cinema

The Irish Film Centre was a long-term project conceived by the Irish Film Institute and later developed with Temple Bar Properties.

6.2 Certification

Under the Censorship of Films Act 1923-1970, the Official Censor of Films and the Censorship of Films Appeal Board are responsible for the censorship of films in Ireland[30] and no film can be exhibited to the public without a certificate from the Film Censor. Censorship fees, based on the running time of the film, are payable by whoever submits the film for classification — usually the distributor[31]. Critically, the fee is a standard one, and is not related to the number of copies of the film distributed or to its box-office potential.

For non-mainstream films, and subtitled films in particular, cost is an inhibitory factor in deciding whether to submit a film for certification for public screening, which can involve spending a disproportionate part of the distributor's box office share, especially if only one print is circulating. Cinema "clubs" circumvent the cost of certification by showing for members (as opposed to the public). A club screening, by its nature, is regarded as a private screening and so the need for certification does not arise.

With the closure of the Light House Cinema in 1996 fewer non-mainstream — in particular, significantly fewer foreign language films — have been certified for public screenings[32]. The Screen, now the only commercial art house cinema in Dublin, concentrates on mostly English language films. In Northern Ireland, the British Board of Film Classification certifies the vast majority of films in UK distribution and QFT and the Nerve Centre in Derry can operate as public cinemas.

However, in the South, most art house films are now distributed in Ireland exclusively on a club basis, opening first at the IFC cinemas where membership is available "at the door" to anybody over 18 years of age at a nominal weekly fee of IR£1 (the annual fee is IR£10). In theory at least, membership must be taken out 15 minutes before attending a screening. Films are advertised directly to the public in press advertisements and using poster campaigns.

FIFS member societies constituted as local film clubs adopt a more-cautious approach. They do not advertise individual films directly in the press and continue, in theory, to promote the separation of membership and the sale of actual tickets.

The current situation whereby most non UK/US films play at the IFC forces other venues to also act as club cinemas if they wish to programme a broader range of cinema. This could also have implications for the Cinemobile project, particularly in relation to young people's screenings.

A circuit of screening venues showing a high percentage of the same films must, to be economically sustainable, be able to attract and develop a wide audience. If restrictions with regard to advertising and promotion of club films were to be strictly applied, it would severely curtail the marketing of these films.

A further anomaly arises with regard to video classification. Films that may have played the IFC as club films and are not certified for public screening are subsequently submitted as videos for video classification for the rental or sell-through market. The cost of video classification is much less[33] and so the situation occurs where is it possible to rent or buy videos of films that cannot be screened in cinemas that are open to the public.

It is important to note that, apart from the cost involved, in practical terms it would be impossible for the IFC, for example, to submit all of the many films that it screens to the Film Censor's office for certification because of time constraints and pressure on the small number of available prints. Such constraints would apply to an even greater extent in the operation of film festivals.

It is beyond the scope of this report to offer solutions to the problems arising here. However, a radical and transparent review of the current situation is necessary and long overdue.

Having to join a club is, at the very least, an inconvenience that the already-committed will accept. At worst, however, it implies exclusivity and privilege and reinforces resistance to non-mainstream cinema and the perception that it is inaccessible.

The viability of operating regional art house cinemas and cultural venues as private clubs needs to be questioned and barriers to access removed if sustainable coordinated regional circulation of art house films is to be attempted.

A process of open discussion about the serious implications for strategic cultural planning in regional development is required. A willingness to contemplate radical change will be essential and it is unlikely that any effective practical solutions will be found if the Film Censor's Office and Government are not invited to participate in the review process.

[30] The equivalent body in the UK is the British Board of Film Classification (BBFC).
[31] At current rates (Annual Report of the Film Censors Office, 1999) the charge is IR£6.20 per minute of film.
[32] See Appendix VI. [33] Costs for classifying a video for release on the rental market is IR£180 and for release on the sell through market IR£80. (Annual Report of the Film Censors Office, 1999)

7 | Opportunities for Development

7.1 Government Development Policy Republic of Ireland

Proposing a public policy to develop high-quality regional cultural cinemas is in complete harmony with wider Government policy objectives for balanced regional development as outlined in the *National Development Plan (NDP), 2000-2006.*

The NDP recognises that the "quality of the cultural, social and recreational infrastructure has a significant role to play in enhancing the attractiveness of a Region, as a place to live, visit, work or establish an enterprise".[34]

Only high-quality cultural cinema projects will make the type of significant contribution to developing the counter-balances to Dublin that are key objectives of the NDP.

Equally, only a flagship project with a truly regional character that asserts confidence and clarity of vision will provide the effective spur necessary to drive further initiatives in developing wider local access to cultural cinema throughout Ireland.

The theme of high quality, introduced here in the context of regional infrastructure, is a constantly recurring one in this study. Once again – as with any enterprise – the quality of facilities and services provided by cultural cinemas will be key determinants of their capacity to achieve objectives of sustainability and regional enhancement

7.2 Population Structure

There is a significant variation in population structure across the State's two regions, Southern and Eastern Region (S&E Region) and Border, Midland and Western Region (BMW Region), as designated in the NDP and as illustrated in the table below.

	State	BMW Region	S&E Region
Population (000s) % Total	3,626	27%	73%
Area (Sq Km)	68,895	32,481	36,414
Urban: Rural	58%:42%	32%:68%	68%:32%
Pop Density (per Sq Km)	53	30	73
Major Urban Centres	5	1	4
Towns over 10,000	23	7	16
Towns (5,000-10,000)	26	8	18

Source: CSO Census of Population, 1996

Potential for population growth notwithstanding, relatively small populations in the four major urban centres outside Dublin, inevitably, has restricted art house development to date.

Population of the Major Urban Centres (including suburbs and environs)

S&E Region	Population in 1991	Population in 1996	% Change
Dublin	929,090	952,692	+2.5%
Cork	174,400	179,954	+3.2%
Limerick	75,436	79,137	+4.9%
Waterford	41,853	44,155	+5.5%
BMW Region			
Galway	50,853	57,363	+12.8%

Source: CSO

However, population size is not the only factor that must be considered in examining what scope for investment is offered by specific urban centres. High per capita cinema-going often occurs in smaller centres than in larger, because concentrations of university students and more-affluent socio-economic groupings are often greater in such centres.

The quality of cinema provision in terms of management, programming and facilities is an equally crucial factor in determining how many people will attend and how frequently.

[34] *Ireland. National Development Plan 2000-2006 (Dublin: The Stationery Office, 1999) p.153.*

7 | Opportunities for Development

7.3 Modelling Opportunities for Development

Interesting research was carried out in 1996 when Dodona Research, together with London Economics, undertook a study of the specialised or art house cinema sector in the United Kingdom for a consortium of clients[35]. The primary purpose of the study was to inform the policy of the principal client, The Arts Council of England in relation to the large number of applications from the art house cinema sector for lottery grants.

The main element the consultants used in modelling opportunities for development in the specialised sector was a regression analysis conducted for 44 venues outside of the West End of London. The analysis focused on how many admissions each cinema generated from its urban area population.

The modelling process also involved analysis of the operation of a representative sample of Regional Film Theatres in England (but not Scotland or Wales) in receipt of services and support from the British Film Institute.

The consultants presented the following key conclusions and recommendations:

- A specialist cinema can conservatively expect to generate annual admissions equivalent to 25% of its urban area population.
- This figure is based upon an average of two performances per day, seven days per week, i.e. 720 performances per annum. A greater number of performances would result in higher admissions.[36]
- In order to provide more choice, the number of seats-per-screen should not normally exceed 190. Sizes down to or just below 100 seats are acceptable in venues serving small populations or for smaller auditoria in multi-screen venues.
- In order to cope with the peaks, the minimum number of seats made available should be four times admissions projected on the basis outlined, i.e. the capacity utilization target should be no more than 25% based on these conservatively projected admissions.[37]
- Therefore, for this number (720 per annum) of performances the number of seats that a cinema should have can be calculated by dividing projected admissions by 180 (25% of 720), i.e. each seat should be sold once every other day on average.

This generated a model that, in theory, could be applied to any size of urban area, providing an indication of the scale of the facility required to exploit potential markets. Practical examples of the application of the London Economics/Dodona Research model to different-sized locations are presented below.

Practical applications of the London Economics/Dodona Research model.

	City A	City B	City C	CityD
Population	480,000	180,000	80,000	60,000
Admissions	120,000	45,000	20,000	15,000
Screens: minimum number	3.5	1.3	.6	.4
Screens: maximum number	6.7	2.5	1.1	.8
Seats	667	250	111	83
Performances	2,526	947	421	316
Capacity	480,000	180,000	80,000	60,000
Admissions per Seat	180	180	180	180
Capacity Utilisation	.25	.25	.25	.25

[35] *Study of the Specialised Cinema Sector – A Report by London Economics and Dodona Research (London Economics, March 1997) was commissioned by The Arts Council of England (ACE), The Cinema Exhibitors' Association (CEA), The British Film Institute (BFI) and Committee of Independent Exhibitors' Association (COMEX).*

[36] *Though as a full-time venue increases the number of performances the number of admissions should not be expected to increase pro rata.*

[37] *Capacity utilisation should be expected to decrease as the number of performances is increased.*

7 | Opportunities for Development

It must be stressed that the model does not take into account all of the factors that will drive admissions. The demographic features of the local population are as important as its size.

Therefore, for the purposes of this present feasibility study, it is crucial that the model's shortcomings are understood. It will provide us with a benchmark and will be utilised as a tool to progress discussion rather than as a definitive guide.

Testing it against an actual location where specialised venues are operated effectively validates this careful approach to the model.

For example, Edinburgh has an urban population close to that of City A in the table above. But the reality is that two full-time specialised cinemas operate successfully there: Filmhouse, which is supported by Scottish Screen, Edinburgh Council and, until now the *bfi*[38], and the independent Cameo, which is run by the commercial art house circuit operator, Oasis Cinemas. The two venues operate three screens each with a combined total of 844 seats.

The comparison with Edinburgh confirms that the London Economics/Dodona model is conservative and that specific factors can and do drive performance above the average. Significantly higher than average admissions are possible in Edinburgh because of its specific demographics. It is a relatively compact university city with a tradition of cultural activity and a high concentration of students and an educated middle class population that contributes to higher-than-average frequency of cinema visits. The higher-than-average number of performances feasible in Edinburgh's cultural cinemas both depends upon and further fuels the above-average frequency of visiting that is crucial in generating higher admissions.[39]

However, as a general rule, higher attendance figures than those suggested by the conservative model should be envisaged only where the factors that will drive admissions above the average can be clearly identified.

Comparison of actual art house operation in Edinburgh with London Economics/Dodona Research model.

	City A	Edinburgh	% Variance on model
Population	480,000	476,909	-0.64%
Admissions	120,000	315,000	+162.5%
Screens: minimum number	3.5	6	+71.4%
Screens: maximum number	6.7	6	-10.4%
Seats	667	844	+26.5%
Performances	2,526	6,360	+151.8%
Capacity	480,000	894,640	+86%
Admissions per Seat	180	373	+107%
Capacity Utilisation	.25	.35	+40%

Note: Estimates of admissions derived from Scottish Screen data and Europa Cinemas Guidebooks

[38] Proposals to put funding directly from the UK's new Film Council to the regions (or nations) are currently being implemented and will end this aspect of the bfi's regional planning functions and funding role.

[39] It must also be acknowledged that Filmhouse in Edinburgh is one of the most successful Regional Film Theatres in the United Kingdom – a fact not unrelated to Scotland's sustained and ongoing commitment to supporting its art house cinemas. This point is further considered in Case Study 1 of this report and has previously been discussed in Film in Ireland – The Role of The Arts Council.

7 | Opportunities for Development

7.4 Counterbalance to Dublin

In terms of population size and favourable demographics Cork should have the most potential to act both as a counter balance to Dublin and as a spur to further regional expansion.

Based on anecdotal evidence provided by interviewees the combined total of Kino and Triskel's admissions may be achieving the level that the conservative UK model projects.

However there are significant factors that support our view that higher attendance figures could be achieved. In general terms the specific demographics of Cork could be expected to exert a positive effect on admissions.

Some qualifying remarks on present provision must first be made.

The number of performances undertaken by the Kino Cinema to reach these figures is 70% higher than that suggested by the model. It suggests that increasing performances results in a corresponding increase in admissions. Performances in Cork are higher than those proposed by the model but only admissions of about 25% of the total population are being generated.

In conclusion, the potential market is being underserved. The key success factors identified in the analysis of IFC Cinemas are to a great extent absent from the Cork marketplace at present.

This situation is likely to continue indefinitely unless there is a change, either in terms of commercial cultural cinema or the provision of a cultural cinema project supported by public (The Arts Council, Cork Corporation or other agencies) and private funding.

An opportunity exists to identify how better to provide for long-term cultural film exhibition in Cork. A discussion including the current providers should follow only after the level of provision suggested by the model for Cork is examined. However, any new cultural cinema venture in Cork is more likely to be successful if there is an element of 'ownership' by the local community in the project.

	Model	Cork	% Variance on model
Population	179,954	179,954	0%
Admissions	44,988	50,000	+11.1%
Screens: minimum number	1.3	1	-23%
Screens: maximum number	2.5	1	-60%
Seats	250	188	-24.8%
Performances	947	1,358	+43.4%
Capacity	179,954	255,304	+41.9%
Admissions per Seat	180	266	+47.8%
Capacity Utilisation	.25	.20	-20%

7 | Opportunities for Development

7.5 A Model for Cork

The National Development Plan proposes the establishment of high-quality regional balances to Dublin as a key objective. Cork's critical position regionally suggests it is the pre-eminent counterbalance to Dublin on economic, social and cultural terms.

Bearing in mind the model's conservatism it suggests that given the population of Cork, it could sustain a cultural cinema of between 1.3 and 2.5 screens. This translates as between a total of 247 and 475 seats with the optimum size for a screen as 190 seats. Current provision is 188 seats at the Kino and 72 seats at the Cinematek (a part-time/part year venue). This would mean a cinema of between two and three screens with at least one screen of 190 seats.

The choice of either two or three screens will be determined by a number of factors. The proposed site and whether it is a greenfield site or arises out of the conversion of an older building. Finding a greenfield site in Cork city centre – the optimum and best location for any cultural cinema and the site most likely to be successful – will be extremely difficult given today's economic climate. It is more likely that the project will involve the conversion of an older space to cinema usage and whose particular dimensions will determine the number of screens.

The level of competition in the marketplace is an important element in deciding screen numbers. With the exception of the Kino and the Cinematek the remaining operators are commercial mainstream venues unlikely to seek to develop cultural cinema in the near future.

Mainstream cinema is developing rapidly and there are constant fears voiced about the threat of "cannibalisation" between multiplexes. Distinguishing similar multiscreen developments from each other by differing programmes incorporating more non-mainstream cinema is often mooted. However, this has not happened to any great extent in Dublin, the market leader, so that we can conclude that it is unlikely to occur first in Cork. The situation could change with the arrival of a cultural operator from outside the country, but present conditions suggest this is also unlikely[40]. Therefore, public funding bodies will need to take the initiative to resolve the situation.

Lastly, the inherent difficulties in programming a one-screen venue prohibit its consideration as part of a model since it does not allow the flexibility necessary to maximise income from either box office or ancillary sales. Even a small second screen of less than 100 seats, down to as low as 60, can be crucial in increasing financial viability.

Programming a two-screen venue not only maximises revenue but also equally importantly satisfies audience expectations. In addition, it generates a critical mass of people so that ancillary activities such as a coffee shop and or bar are more likely to be profitable, justifying the staff expenditure needed to run them efficiently.

The provision of a third screen should also be considered. A well-designed third screen of even 60 seats could increase considerably the viability of the overall project. It would then be possible to consider repertory screenings of the quality end of mainstream exhibition or the retention of more-successful titles for longer runs. The third screen could also play more-marginal or "risky" titles that might not be sustainable in the larger screens but would add considerably to the programming mix, broadening the range of cinema available to audiences.

Briefly the model as applied to Cork suggests a cinema of two or three screens, one of which is at least 190 seats and the smallest of which could be 60.

For it to be viable, any cultural cinema — particularly a standalone venue —would need to be operated on a full-time basis, seven days per week with three or four screenings per day per screen.

This has two implications. Firstly, the cinema will maximise income. Second, it will function more significantly as a social and community asset allowing access and participation from all sections of the community who for whatever reasons, be they transport, cost or safety, are unlikely to visit the cinema at night. This could include children and families, teenagers, older people and shift workers.

[40] *Our examination of likely operators, for example, City Screen in the UK (see Case Study 2) suggests that unless substantial amounts of capital and incentive funding from local authorities or other public bodies is made available they are unlikely to risk entering the market.*

7 | Opportunities for Development

The development of cinemas in city centres can enhance the attractiveness of the general leisure and cultural infrastructure and increase the pull of business and shopping in large cities. The benefits to local and urban authorities increasingly interested in sustaining lively and viable city and town centres needs to communicated more clearly by all the parties involved.

From the analysis of costs involved it is clear that a cultural cinema is unlikely to be sustainable without some level of ongoing public funding. The benefit that such a cinema can bring to a community justifies realistic levels of ongoing funding.

However, the chief consideration is that cultural cinemas be run as efficiently as possible. The fact that they must in practice be run as small to medium sized enterprises operating in a competitive marketplace has to be accepted. Public funding should be available to support the development of cultural and educational activities that an exclusively commercial market will not financially sustain. Such activities, which distinguish cultural cinema projects, fulfil research and development needs of the production and exhibition sector as a whole.

The IFC's presence in Dublin has contributed to the development of a sense of a vibrant film community. The opportunity exists for a cinema in Cork to assume a similar role in a burgeoning film industry that includes the Cork Film Centre, the Cork Film Festival and a potential Cork Film Commission.

Such a cinema will, however, need to be fully resourced if it is to deal with the growing expectations and demands of audiences for high-quality standards of programming and presentation.

8 | Modelling a Regional Network

Given the significant variation in population structure across the country and the challenge to the economic viability of cultural cinema projects that this presents, a recurring theme throughout this report is the need to develop collaborative work practices and build operational partnerships in order to reduce costs and improve the range and quality of regional cinema provision.

Approaches to meeting simalar challenges in the UK are outlined in UK Network Models, Case Study 3 of this report, which should be read in conjunction with this current chapter.

We will use two terms, "network" and "circuit" (that arguably are not interchangeable), which have not been defined separately here in order to leave open the possibility of a range of potential partnership arrangements linked with varying degrees of regional autonomy.

8.1 Existing Networks within Ireland, North and South

Examples of commercial circuits are evident in Ireland and elsewhere and are the basis of commercial exhibition, e.g. the Ward Anderson cinemas, UCI, UGC, etc. These are all strict, rigidly operated cinema circuits that are managed, programmed and booked from a central head office. Economies of scale, not local autonomy, are the priority.

In contrast, what little networking currently being done by cultural cinema projects in Ireland is extremely informal. The IFC, Kino and QFT cinemas co-operate, exchanging information and sharing prints were possible. However, each cinema books films and negotiates with distributors individually.

The FIFS operates a centralised booking system for each of its member societies but again each of the societies determines its own programme including the part-time Cinematek.

No formal structures to support collaboration exist at present though organisations have worked jointly on projects such as the Bealtaine Arts Festival for older people during May 2000 on which the FII, the FIFS, UCI Cinemas and the Age and Opportunity organisation co-operated.

8.2 Benefits and Implications of Networks

The benefits of booking films for a circuit or network of cinemas are obvious. A more co-ordinated approach to booking enhances not only programme opportunities for individual venues, but also assists distributors releasing specific types of material (i.e. guaranteeing a certain number of bookings on selected films – so providing distributors with confidence in distributing risky titles).

Having programme decisions taken by a single body also enables individual cinemas to streamline staffing resources and therefore costs.

A more co-ordinated approach to marketing would create more opportunities for Ireland-wide campaigns and would generate economies of scale.

For a network or circuit to operate successfully a centralised source of programming must be contemplated. For commercial circuits, either cultural or otherwise, this does not pose a problem. But, for independent or single venues the question of autonomy versus centralised decision-making is an issue.

However, in a sector characterised by the fragmentary nature of development to date it is unrealistic and indeed undesirable for any new developments not to be envisaged as part of a network or circuit. It is also likely that access to prints will become more of an issue if new venues come on stream. Indeed existing full-time venues will need to be receptive to the idea of joining a network even if this means sacrificing some levels of autonomy and control locally. The core functions of any network are identified below.

8 | Modelling a Regional Network

8.3 Network Administration

Core functions:

• Booking films onto a regional circuit including organising transport of prints
• Negotiating terms and conditions with distributors
• Maximising the number of prints available to the circuit
• Liasing with distributors on upcoming titles
• Informing and updating the network on new acquisitions and developments
• Providing publicity material and programme notes.
• Developing and marketing an overall brand image for the network to strengthen its effectiveness
• Developing a national and regional profile among film makers, industry professionals and audiences by highlighting the work and benefits of an independent circuit of cinemas
• Instigating and developing cross network marketing campaigns
• Developing closer ties with, and encouraging the involvement of, the larger film industry.
• Developing educational programmes alone or in conjunction with related organisations
• Such programmes to include touring programmes, special seasons and retrospectives, indigenous film programmes including shorts, animation, experimental films, etc
• Designing publicity material and educational material to support these programmes
• Developing and initiating joint actions with other film organisations and agencies.

• Applying for funding and sponsorship from appropriate public and private bodies for cross network initiatives and joint action plans.
• Developing networking opportunities for members to exchange information, ideas and experiences as an integral part of the overall functioning of the network
• Identifying and developing training opportunities that offer further professionalisation for network staff either alone or in conjunction with relevant training bodies
• Arranging screening opportunities for network members to view film programmes.
• Designing in collaboration with network members key performance indicators for the network
• Collating, managing and disseminating such information to members and other relevant bodies.
• Utilising economies of scale for the network. Negotiating discounts and optimum prices for bulk buying of stock for example foods including coffee, wine, etc.

Establishing a new resource organisation to carry out these core functions would be costly

Projected Expenditure and Income

Expenditure	IR£
Director	30,000
Marketing and Publicity Officer	22,500
Programming Assistant	18,000
Booking and Transport Officer	16,000
Administrative Assistant	15,000
PRSI@12%	12,180
Marketing Budget	30,000
Programming Budget	10,000
Transport Costs	10,000
Travel	10,000
Office Costs	20,000
Total	193,680
Contingency 10%	19,368
Total	213,048

Income	IR£
The Arts Council	100,000
Irish Film Board	50,000
Funders (could include Enterprise Ireland, RTE)	50,000
Sponsorship	20,000
Total	220,000

However, a persuasive case for this level of funding for an entirely new resource organisation could hardly be made in the context of this report's arguments for more strategic support for existing initiatives and organisations that could provide a stable base for future development.

8 | Modelling a Regional Network

8.4 Potential Service Providers

The initial priority must be to identify an operational structure to support enhanced programming, marketing and technical support for the growing infrastructure of arts and community centres.

In this context, the question of the extent to which either the Film Institute of Ireland (FII) or the Federation of Irish Films Societies (or a combination of both) can provide these services arises.

8.5 The FII and IFC Cinemas

The success of IFC Cinemas to date – examined in Section 6 – testify to the wealth of experience and expertise gained in cultural film exhibition. The FII has already stated its commitment to facilitating the provision of cultural cinema on a regional basis[41]. Notwithstanding its location in Dublin it is exploring ways in which it might engage with cultural film exhibition more widely while acknowledging that distribution is " a complex business"[42] that requires adequate resources to engage with successfully.

The network driven by the IFC's programming and marketing input would be made up of individual member venues, all of which are independent financial institutions. The venues would be responsible for their own business plans and must determine their own financial viability. Venues, in effect small businesses, should be managed as efficiently and effectively as possible to maximise income from ticket and ancillary sales.

Locating the network's administrative core in the IFC is likely to be more cost effective by building on existing resources and at the same time guaranteeing access to the greater managerial, administrative and financial strengths of the IFC.

The cinemas have built up strong links in the distribution sector and formed relationships with the key distributors of cultural cinema product. These connections now exist and could be built on to provide for more cultural cinema regionally.

The IFC and the FII has been particularly successful in developing education initiatives both directly at school level but also within the wider film audience. This expertise, provided it was fully resourced, could be more widely applied regionally. The existing outreach programme currently run by the FII could be extended to link in with network members.

The FII also has strong links with other film organisations and agencies and is respected and known in the sector. The new film exhibition initiative, the Cinemobile is linked to the FII and this should be helpful in the development of a coherent regional strategy for cultural film exhibition.

8.6 The FIFS and the Arts Centres

Currently the FIFS central office books films for its individual societies that programme their own venues. The participation by people at a local level is one of the strengths of the FIFS but it does curtail any attempts by the FIFS to act as a circuit. The question of whether the FIFS wishes to change this mode of operation or whether new developments, specifically the growth in 35 mm societies will necessarily impose or is already imposing changes is one, which the FIFS itself will need to engage with.

Arts centres that currently work with local film societies are, as already noted interested in developing film activity but acknowledge their lack of expertise in this area. Certainly significant potential for growth in film activity exists within arts centres where film exhibition regionally is becoming more concentrated.

An increase in provision will need to be provided by the FIFS working with arts centres, by arts centres themselves, perhaps in conjunction with other arts venues, by the FII's regional policies and by film festivals. This will necessarily involve and demand more dialogue and interaction between the various interested parties.

[41] *"Within certain funding constraints, IFC Cinemas will play an active part in ensuring distribution of films which are currently screened in the Irish Film Centre to other suitable venues." Film Institute of Ireland Five Year Plan, 1999-2003, page 42.*
[42] *Film Institute of Ireland Five Year Plan, 1999-2003, page 22.*

8 | Modelling a Regional Network

8.7 Public/Private Partnerships

The public/private sector partnership model brings a level of expertise - identified as lacking in the public sector partnership - in return for funding usually but not always involving capital costs.

The partnership or arrangement depends for its success on realistic assessments by both sides of what is possible, an understanding of the issues involved, guarantees that public monies will be directed towards the best utilisation of funds and an ongoing commitment by the private partner to the sector.

An example of this in the UK is the development of City Screen, which has benefited considerably from public monies (principally English Lottery funds)[43]. City Screen in turn has brought a level of professional expertise to the programming and management of cultural cinema venues and in some cases, with additional public funding, have provided specific educational programming.

While public/private partnerships provide significant opportunities for growth in the sector, identifying suitable partners among the private sectors will be a very big issue. Commitments and guarantees would need to be watertight to protect public monies and finance.

[43] *Case Study 2 should be read in conjunction with this section.*

9 | Conclusions

9.1 Introduction

In considering whether it is feasible to establish a network of regional art house cinemas we were asked to identify specific areas where it might be possible to establish such cinemas.

A regional and sectoral analysis is offered below. Further issues around the development of cultural cinema emerged strongly during the study and are outlined in the analysis.

The chief conclusion is that regional cultural film exhibition to date in Ireland, North and South, is significantly under-resourced. Development has occurred in a fragmentary manner outside of any overall strategy to advance the sector. Establishing a network of art house cinemas will only become feasible if underlying infrastructural deficiencies are addressed.

To do so resources will need to be made available, not only financial but also more importantly the strengthening of cultural film exhibition at the centre of film policy by the relevant bodies. The bodies directly responsible for film exhibition, in this case, The Arts Council and the NIFC have an opportunity to play a more active advocacy role in the future.

9.2 Cork

Cork as the largest urban area outside of Dublin offers the best opportunity in terms of audience potential to develop a cultural cinema. The nature of the Kino Cinema and the Cinematek developments in Cork to date do not, in our opinion, realise the potential for growth in cultural cinema exhibition in this area.

The lack of resources, both in financial and human terms at the Kino curtails the amount of activity the cinema can offer beyond the core programme. Opportunities for programme enhancement activities to include visiting film-makers/post screening seminars and discussion/educational activity aimed at young people or other sections of the audience as well as special screenings, retrospectives or seasons are very limited.

9 | Conclusions

The level of cultural film exhibition engaged in by Triskel Arts Centre through the Cinematek is unique among arts centres at present and could be seen as a potential model for future development in the area[44].

However, if the Cinematek is to serve as a model then its current operation needs further investigation, specifically its programming policy. This has been determined to a large extent by the proximity of a commercial cultural cinema, the Kino. Drawing conclusions from the Cinematek's unique experience, in particular when contemplating programming policies for other arts centres, is not especially useful. The scenario whereby two cultural cinemas are located side by side is unlikely to be an issue for other arts centres interested in engaging in cultural cinema exhibition.

Despite requests for detailed admission figures the Cinematek did not make these available. Anecdotal evidence suggests that their programming policy of screening more "cutting edge" cinema – influenced to some extent by its proximity to the Kino - is not attracting sizeable audiences. While extending the range of cultural cinema is commendable it is reasonable to question how feasible this is and important to be able to consider the extent to which the showing of more difficult films can be subsidised with income from more popular titles.

The Kino also did not make admission figures available. At present there is little co-operation or collaboration between the Kino and the Cinematek. Both venues are under resourced and see themselves in competition for the same audiences and to some extent the same films. This level of competition and lack of co-operation in programming films is not benefiting audiences for cultural cinema in Cork.

Were any new developments to be contemplated by public funding bodies or other commercial operators, they would have serious consequences for the existing operators. Their presence makes contemplation of new or further developments problematic without their involvement.

[44]We are aware of the activity of the Waterford Film Society, which screens on 35 mm in Garter Lane Arts Centre. However, this is once a week and the programme is organised by volunteers unlike the Film Officer in the Triskel Arts Centre.

9 | Conclusions

9.3 Galway

The strength and growth of Galway Film Society, now screening in the Town Hall Theatre on Sunday nights between approximately October and May each year, deserves commendation. However, the potential for further development, either in terms of increased screenings at the Town Hall or the human and financial resources to increase programming activities is limited. Any change in cultural cinema provision in Galway is likely to have immediate consequences for the film society.

Galway Mayo Institute of Technology's (GMIT) main campus is located at Cluain Mhuire, (a former Redemptorist seminary) about 10 minutes outside of Galway city centre. The Institute is developing and upgrading the campus to include the provision of a 300-seat high-specification auditorium. The auditorium, which will be completed in 2001, will also be capable of 35 mm screening facilities.

GMIT currently offers diploma courses in film and television studies and video production in association with the Galway Film Centre, which is based on the Cluain Mhuire campus. The centre is planning to develop art house screenings on a limited part-time basis around the educational requirements of GMIT.

Notwithstanding the fact that development will greatly enhance the appearance and attractiveness of Cluain Mhuire, its location outside of the city centre is a significant negative factor affecting visibility and accessibility.

It is questionable if the Cluain Mhuire project can provide the basis of long-term cultural cinema provision for Galway or whether it is more appropriate to consider it as an interim measure in a long-term strategy to develop a full-time dedicated art house venue. It would be a pity — particularly for audiences — to repeat the situation in Cork whereby the potential for long-term growth is undermined by development that falls short of being able to exploit its full potential.

Programming choices and policy will need to be clearly elaborated by the Galway Film Centre and issues have yet to be answered around the co-existence of the Galway Film Centre and the Galway Film Society. Competition for films is not at all desirable and is unlikely to be beneficial to audiences. Co-operation and indeed collaboration will be necessary to exploit the exhibition opportunities offered by any new initiatives at Cluain Mhuire.

Outside of these developments there is understandable caution on the ground and within the Local Authority about establishing a full-time art house cinema at present. But there is also a clear recognition that the time is right for moving beyond existing provision. Were the advantages of locating cinemas in city centre and urban areas to be made more forcefully to the local authority or championed by the local film community the situation might change. However, the difficulties of finding and developing a site or identifying a potential site owned by the Local Authority in a rapidly developing city such as Galway should not be underestimated.

Our necessarily cursory examination of possible sites suggests that developing a cinema beside or as an extension of the Black Box Municipal Theatre, just outside of the city centre, warrants serious investigation.

9.4 Limerick

The Belltable Arts Centre has housed the Belltable Film Society over a long number of years. Currently the Belltable is examining its own future and planning extensive development of the centre either at its present site or a new site. There are plans to incorporate a 35 mm screening facility (of about 100 seats).

Real potential exists to support the development of new facilities in a new/refurbished Belltable Arts Centre in Limerick. Because plans are still at an early stage it would easily be possible to include a high-quality cinema facility, either one or two screens, in an overall arts complex. The question of whether the venue should include one or two screens needs further investigation.

Beyond the film society and the Fresh Film Festival for young people there is very little cultural cinema exhibition in Limerick.

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9.5 Waterford

At present cultural cinema exhibition is provided by Waterford Film Society screening one night a week during the normal film society season in Garter Lane Arts Centre. Improvements have occurred within the Arts Centre in regard to screening facilities and again ongoing high standards of presentation need to be prioritised.

Because Garter Lane has installed 35 mm facilities, huge potential exists for increased film activity, particularly in the area of film education.

9.6 Derry

Within Northern Ireland, valuable initiatives at the Orchard Cinema in Derry have been developed by the Nerve Centre. The Nerve Centre's ongoing educational activities have been particularly noteworthy. The growth of the Nerve Centre and the development of Foyle Film Festival and the development of the Orchard Cinema as a non-mainstream exhibition space are examples of how interconnected events can spur year-round cultural cinema activity.

9.7 Belfast

In Belfast, the long-established Queen's Film Theatre is a very valuable asset for the city. However, the long-term direction of the cinema needs to be closely monitored and assessed. The present site will need to be significantly upgraded and refurbished or a new site found if it is to compete successfully for audiences in the future.

9.8 Other Population Centres

There are number of population centres above 10,000 people who have no regular art house provision at all. Some of these centres did have film societies in the past but currently do not. Large centres of population close to Dublin are served to an extent by art house provision in Dublin city centre. All population centres have access to mainstream cinema.

9.9 FIFS

The FIFS is the only film organisation currently operating on a national basis through its regional film societies. The importance of its role in providing cultural cinema is critical. However, regional provision is in a state of transition with the potential entry of a number of arts centres interested in or currently developing screening facilities and an extended role for the FII. It is unlikely that film societies alone, particularly in large urban areas, will be able to meet the demand for cultural cinema provision in the long term

The advent of more arts centres will naturally effect film societies, particularly in those areas where both are located. The FIFS and arts centres already work together in some cases; however, it is unlikely that volunteer film societies will be able to provide the level of activity needed for increased programming within arts centres. More likely, film societies will become one element in overall film activity in arts centres.

Our analysis of areas with no cultural cinema provision at present suggests that the FIFS has a vital role to play in encouraging and helping more communities to become involved in film exhibition.

Questions around the long-term availability of 16 mm film and the advent of digital cinema still exist.

In 1998 the FIFS commissioned a development plan which envisages new directions for the organisation. The plan identifies that the Board and Administration will require appropriate restructuring if it is to achieve its objectives.

9 | Conclusions

9.10 Film Institute of Ireland

The FII has stated its desire to fulfil a larger national remit. To date this has not been possible because of the need to focus its energies on the development of the IFC and a lack of resources. The FII has gained a great deal of experience and knowledge over the eight years of its existence in the IFC and this could be usefully applied in developing the sector regionally.

The IFC model, while not applicable in its entirety, in another situation should be the measure by which other developments are judged.

The IFC is an example of what is possible provided there is an emphasis on programming and quality of presentation in appropriate surroundings. Ensuring a quality experience for patrons has to be the guiding principle for future developments.

One possible new direction for the Federation is that it uses its considerable experience and resources to develop its potential to become a distribution agency engaged in wider distribution and exhibition of art house cinema throughout Ireland, perhaps in partnership with another film organisation. The extent to which this is implemented — and whether the other new directions envisaged will be feasible — depends on the level of restructuring of the Board and administration.

Art house screening facilities in centres of population above 10,000 and below 44,155 (the population of Waterford)

Centre	Population	Art house Screening Facilities
Dundalk, Co. Louth	30195	None
Bray, Co. Wicklow	27923	None
Drogheda, Co. Louth	25282	None
Swords, Co. Dublin	22314	None
Tralee, Co. Kerry	19950	Film Society
Kilkenny, Co. Kilkenny	18696	Film Society
Sligo, Co. Sligo	18509	Film Society
Ennis, Co. Clare	17726	None
Clonmel, Co. Tipperary	16182	Film Society
Wexford, Co. Wexford	15862	Film Society
Athlone, Co. Westmeath	15544	None
Carlow, Co. Carlow	14979	None
Naas, Co. Kildare	14074	None
Malahide, Co. Dublin	13539	None
Leixlip, Co. Kildare	13451	None
Newbridge, Co. Kildare	13363	None
Navan, Co. Meath	12810	None
Mullingar, Co. Westmeath	12492	None
Celbridge, Co. Meath	12289	None
Killarney, Co. Kerry	12011	None
Letterkenny, Co. Donegal	11996	None
Greystones, Co. Wicklow	11296	None
Tullamore, Co. Offaly	10039	None

Source: CSO/Light House

Film societies operating in centres of population below 10,000 people include:

Kenmare, Co. Kerry; Letterfrack, Co. Donegal; Castlebar, Co.Mayo; Roscrea/Birr, Co. Offaly; Schull, Co. Cork (video only); Skerries, Co. Dublin; Macroom, Co. Cork; Tinahely, Co. Wicklow; Skibberean, Co. Cork.

9 | Conclusions

9.11 Festivals

Festivals provide important opportunities for attracting audiences to films, both Irish and international, that might not otherwise be seen and as such have a vital role to play in encouraging the growth of cultural cinema. The key role of festivals aimed at young people that provide high-quality film activity cannot be overstated.

However, the need to develop audiences for film in Ireland can only be partially met by film festivals and they cannot be considered a substitute for year-round exhibition activity.

While the programming, organisation and presentation of the event must remain the core operation of any festival, the benefit of extending its activities should not be overlooked. The experience of Cinemagic, detailed earlier, which has developed year round film activities, deserves attention.

On the island of Ireland at present there are a reasonable number of film festivals given the size of the population. There seems little advantage in developing more, particularly those with a general or broad focus.

9.12 Arts Centres

Arts centres have an increasing role to play in this sector and arts centres who actively wish to develop film exhibition facilities should be encouraged and supported.

Although more arts centres are interested in providing film exhibition facilities they also feel they have little knowledge or understanding of the sector. Arts centre staff are usually required to be multi-skilled but few have up-to-date cinema experience. Opportunities for specific professional training to upgrade and improve film skills are very limited.

However, there is a danger that arts centres may perceive film exhibition as a relatively easy method of generating additional revenue. Arts centres must accept that film exhibition is justified as an end in itself and needs to be supported by programme enhancement activities.

Sourcing capital funding to develop screening facilities in arts centres may be relatively easy given the economic climate and the range of support available including the ACCESS scheme[45]. However, arts centres and funding bodies should be realistic about the need for ongoing revenue funding, particularly in relation to costly but crucial programme enhancement and educational activities.

9.13 Multiplexes

Opportunities exist within the multiplex sector to extend the range of cinema on offer. Initiatives that attempt to broaden the type of films seen at multiplexes, if carefully considered and realistically funded, could have a significant impact.

However, given the fragile nature of current art house provision it is likely that such initiatives would endanger existing film societies or arts centres located nearby without guaranteeing long term provision for cultural cinema. Any initiatives in this area should be considered as secondary to the primary concern of providing for more dedicated cultural cinema screening venues.

9.14 Sectoral Issues

There are few opportunities for practitioners to develop skills or move within the sector in Ireland given the low level of activity, particularly outside of Dublin. There are also few formal opportunities to share experiences/knowledge and limited collaboration between organisations in the sector to reduce costs or create a bigger impact.

Practitioners often feel that they are continually being audited by funding bodies. Organisations stated that they would find it more helpful if they felt that they were working with public funding bodies and other film organisations to attain clearly stated and understood goals.

Quantitative and qualitative data about the sector other than that supplied by commercial interests is not available. Where data exists it is not always openly or easily accessible. Practitioners and organisations expressed anxiety and doubt about the lack of information available about the sector. Within festivals more data should be made available, linked with agreed and mutually accepted performance indicators.

[45] *Round One Access decisions are due by June 2001*

9 | Conclusions

Standards of best practice have not been developed for the sector. Emphasis has not been placed on achieving the highest possible technical standards across all areas of film exhibition activity. While any cultural film exhibition is to be congratulated there now needs to be a corresponding emphasis on quality of presentation both in terms of technical and comfort levels if cultural cinema is to make more impact considering improvements in multiplex developments.

9.15 Cinemobile

The Cinemobile 2001 is a welcome addition to increasing screening opportunities in Ireland. The overall programming and operational strategy for the Cinemobile has yet to be fully elaborated. Like other initiatives in this area it is more likely to be effective if it makes strong links and connections with existing film organisations.

10 | Case Study 1: Scotland

Background

Erika King's 1998 report *Film in Ireland-The Role of The Arts Council* looked closely at the experience of developing film policy in Scotland from the 1930s up to the establishment of Scottish Screen in 1997 and should be read in conjunction with this case study. Significant findings emerged from this study that are applicable to Ireland at this present time. The chief conclusion was that clarity of remit, intention, structure and purpose is essential if creative energy were to be given its full rein and opportunity.

That report stressed the close affinity that Scotland has to Ireland in terms of size (78,500 sq. km. to Ireland's 70,000 sq. km.), population (5 million to 3.5 million) and culture. In 1999 the already largely devolved administrative structure for Scotland was matched politically with the establishment of a Scottish parliament.

Exhibition of cultural cinema and the development of a strong film culture was a specific feature of the Scottish Film Council (SFC) which was committed to supporting audience-related activity, and the obvious gap in the provision of art house cinema in Scotland.

The result was the creation of arguably the two most-successful Regional Film Theatres (RFTs) in the UK (Glasgow Film Theatre and Filmhouse, Edinburgh) with a network of smaller or part-time venues in Inverness, Dundee, Stirling, Dumfries and Kirkcaldy. Only one theatre (in Irvine) proved unviable.

The RFTs represented a significantly larger part of the exhibition sector in Scotland than their equivalents south of the border (nearly 30% of UK admissions from a population of 10% of the UK).

In addition to the RFTs, SFC supported film festivals, in particular Edinburgh, the film society movement, and the establishment of community cinemas and mobile cinemas in rural areas.

In 1997 all of the film agencies were grouped together in one organisation, Scottish Screen. It was conceived as a "one-stop" agency with a remit covering all aspects of film in Scotland including the responsibilities of SFC.

Current Situation

Initial worries that Scottish Screen might choose to concentrate on film production have been offset with the appointment of a dedicated exhibition manager to oversee developments in this sector.

This has been crucial in allowing Scottish Screen to continue an overall coherent exhibition strategy and the ability to work effectively with other cultural agencies/ organisations who have responsibilities in this area.

Scottish Screen provides financial support (revenue funding) to seven cultural cinemas across Scotland. This support is given in partnership with local authorities in each area and it aims to provide a hub in each area of the country enabling the widest range of film possible to be screened to the technical standards the film-maker originally specified. In 1998/99 there were almost 400,000 admissions to these cinemas. They are located in the middle and south of Scotland with other initiatives, including the mobile cinema serving the remoter and less-populated Highlands.

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Cinemas supported by Scottish Screen

Name	Location	Screens	Screen Size	Screenings
Filmhouse	Edinburgh City	3	280/97/73	Full time
GFT	Glasgow City	2	404/144	Full time
MacRobert Arts Centre	University of Stirling	1	495	Part time/Occasional
Eden Court Theatre	Inverness	2	797/84	Full time in smaller Auditorium/ Occasional in larger
Adam Smith Theatre	Kirkcaldy	1	475	Part time/Occasional
*Steps Theatre	Dundee	1	250	Part time/Occasional
Robert Burns Theatre	Dumfries	1	67	Part time/Occasional
Dundee Contemporary Arts	Dundee	2	217/77	Full time

**The Steps Theatre has been superseded by Dundee Contemporary Arts, which opened in Autumn 1999.*

One of the newest developments in Scotland is the establishment of Dundee Contemporary Arts, a two-screen cinema within a larger contemporary visual arts complex which opened in 1999. Dundee Contemporary Arts is a new building and a new institution, both brought into being by the partnership of three main bodies, Dundee City Council, the University of Dundee and Dundee Contemporary Arts Ltd.

The development was supported by the largest grant to date from the Scottish Arts Council National Lottery Fund of Stg£5.4 million. While the project was initially driven by the desire of local individuals/artists and organisations to provide space for the visual arts, the decision to relocate the existing but part-time Regional Film Theatre, the Steps Theatre to the new centre as a full-time, two screen operation has been critical. The coexistence of facilities in the building has practical and financial benefits. It allows shared expertise and enormous potential for breaking down barriers, particularly between artforms, most significantly art and film.

The long term strategy of supporting regional film exhibition initiatives by Scottish Screen and earlier by the Scottish Film Council has meant the new Dundee Contemporary Arts has been able to build on the existing infrastructure to secure the new cinema development.

Scottish Screen supports one major film festival in Edinburgh, which has an international reputation. Smaller festivals such as the French Film Festival or the Italian Film Festival are organised by the venues, in this case Edinburgh Filmhouse and GFT, and are in receipt of modest amounts of project funding.

As in England, national lottery funding is distributed through the Scottish Arts Council, SAC, which makes capital funding grants. The capital programme has given grants for the development of cinemas in areas where no provision exists as well as supporting Edinburgh Filmhouse and GFT to upgrade their facilities. Scottish Screen Exhibition works closely with the Scottish Arts Council as part of the Council's assessment and monitoring process. Scottish Screen also advises organisations about the Lottery process to assist them in making applications.

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Scottish Screen has developed performance indicators both for the cinemas supported and the Edinburgh International Film Festival. In the case of each of the cinemas their activities are assessed under the following headings: screening programme events/activities; programme enhancement activities including presence of film-makers, seminars, etc; and education programmes.

In Ireland, the development of performance indicators is a key objective of The Arts Council current *Arts Plan 1999-2001*, which proposes to develop performance indicators and impact measures for its funding programme, in consultation with funding recipients. These are to be designed to help The Arts Council and others to evaluate effectiveness, to guide future decisions and to ensure that scarce resources are put to best use.

Importantly, Scottish Screen publishes an annual report, *Scottish Screen Data*, covering all aspects of the audiovisual industry in Scotland. Data include annual paid admission figures to regional film theatres as well as screening and admission figures to the Edinburgh International Film Festival.

It is important to note that although Scottish Screen supports all the seven screens listed they do not function as a network. There are, of course, strong informal links between the cinemas, particularly Edinburgh Filmhouse and GFT. The cinemas are programmed individually responding to local needs.

Of the seven cinemas funded by Scottish Screen only two, Edinburgh Filmhouse and GFT are members of the *bfi*-supported Regional Film Theatres.

The *bfi* is undergoing significant change in terms of exhibition policy driven by the Department of Culture, Media and Sport (DCMS) new approach. Edinburgh Filmhouse and GFT, the two most-successful art house cinemas in Scotland have relied both financially and operationally on support from the bfi. This may be set for change in the future with funding/support packages being renegotiated. The cinemas have actively been looking at new ways of securing film titles. They have initiated discussions with City Screen, the independently operated commercial chain, to look at ways by which they might forge links to increase access to the most-profitable first-run art house titles.

Scottish Screen, while supportive of these initiatives, is conscious that any partnership between public-funded bodies and private enterprise must be skewed towards overall public benefit.

Conclusions

The presence of a vibrant and active cultural film exhibition sector in Scotland is the result of its inclusion within an overall film policy over a long period of time, essentially since the early 1930s.

The establishment of one body, Scottish Screen, responsible for all film activity has streamlined developments and energised the sector. The acceptance within Scottish Screen of the importance of screen culture has been demonstrated with the appointment of a dedicated full-time exhibition officer to advance the sector.

Scottish Screen has built on early initiatives to continue to support policies that develop audiences for a range of world cinema as well as local indigenous productions. Scottish Screen and earlier bodies have taken a strong interventionist approach at all levels of development to drive the sector forward. It has taken an active part in facilitating and developing partnership arrangements with appropriate bodies, both public and private. Crucially Scottish Screen, both by itself and with other relevant organisations, sets and agrees standards of best practice in the sector. Scottish Screen works directly with and supports organisations to develop and exploit all opportunities to further cultural cinema exhibition.

Scottish Screen has identified specific targets and funding objectives and allocates realistic amounts of funding to ongoing activities, which can make a national impact, rather than dividing funding through smaller less-focused activities. A level of funding that enables it to make a significant international impact supports the one major film festival.

Scottish Screen has developed performance indicators, which allows it to assess its funding activities and to compare the results of funding across a range of venues. Data regarding these activities are readily and publicly available. This should facilitate forward planning so that it is adaptable and flexible in this rapidly changing sector.

As already noted in the earlier study on Scotland:

"The crucial messages, therefore, may be as much to do with self-confidence and clarity of vision as with politics and finance"[47]

[47] *Film in Ireland-The Role of The Arts Council, Erika E King Associates, 1998.*

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SCOTTISH SCREEN

EXHIBITION PERFORMANCE INDICATORS 1997/1998
1. Screening Programme

	Filmhouse	GFT	MacRobert	Eden Court	Steps	Robert Burns	Adam Smith	Total
No of Admissions	150,058	148,454	29,469	36,747	17,155	17,457	16,861	416,201
No of Performances	3,001	2,540	169	612	278	363	164	7,127
No of Programmes	430	504	141	195	150	127	164	1,711
No of Feature Films	400	479	130	189	109	127	92	1,526
No of British features	66	93	35	56	33	39	22	344
No of Foreign Language Features	160	218	24	30	20	13	11	476
No of Films in Gaelic	3	5	0	4	0	0	0	12
No of documentary Films	22	34	5	9	12	5	2	84
No of Short Films	133	147	31	44	28	6	0	389
No of Programmes of TV	10	9	0	0	0	0	0	19
No of First Run Films	77	197	78	103	73	79	31	638

SCOTTISH SCREEN

EXHIBITION PERFORMANCE INDICATORS 1998/1999
1. Screening Programme

	Filmhouse	GFT	MacRobert	Eden Court	Steps/DCA	Robert Burns	Adam Smith	Total
No of Admissions	149,287	142,171	28,520	25,116	17,722	14,300	10,355	387,471
No of Performances	3,180	2,603	187	646	331	334	159	7,440
No of Programmes	406	462	154	231	122	118	112	1,605
No of Feature Films	370	442	149	220	104	118	114	1,517
No of British features	75	68	37	60	22	26	24	312
No of Foreign Language Features	161	193	26	57	29	10	14	490
No of Films in Gaelic	0	3	0	0	0	0	0	3
No of documentary Films	19	31	5	12	4	3	5	79
No of Short Films	115	173	31	46	19	3	15	402
No of Programmes of TV	6	10	0	0	1	0	4	21
No of First Run Films	71	86	76	98		84	28	112

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2. Programme Enhancement 1997/98

	Filmhouse	GFT	MacRobert	Eden Court	Steps/DCA	Robert Burns	Adam Smith	Total
No of Filmmakers Present	28	68	0	2	1	0	2	101
No of Programme Notes	41	86	7	6	4	3	2	149
No of Groupings of Films	42	65	4	15	6	5	3	140
No of Talks/Audience Discussions	35	112	1	9	1	7	2	167

2. Programme Enhancement 1998/99

	Filmhouse	GFT	MacRobert	Eden Court	Steps/DCA	Robert Burns	Adam Smith	Total
No of Filmmakers Present	18	58	1	0	2	0	17	96
No of Programme Notes	51	76	52	10	6	0	4	199
No of Groupings of Films	39	58	8	26	3	4	5	143
No of Talks/Audience Discussions	37	91	5	11	1	0	3	148

3. Education Programme 1997/98

	Filmhouse	GFT	MacRobert	Eden Court	Steps/DCA	Robert Burns	Adam Smith	Total
No of Screenings	72	103	3	14	43	30	10	275
No of Events	31	103	5	4	2	9	0	154
No of Outreach Projects	17	2	1	4	1	6	0	31
No of Formal Courses	5	2	0	2	0	1	0	10

3. Education Programme 1998/99

	Filmhouse	GFT	MacRobert	Eden Court	Steps/DCA	Robert Burns	Adam Smith	Total
No of Screenings	51	87	10	16	56	12	18	250
No of Events	44	47	10	5	9	0	2	117
No of Outreach Projects	26	9	11	4	3	1	2	56
No of Formal Courses	6	1	0	3	0	0	2	12

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Scottish Screen Exhibition 1997/1998
Income Summary Update

	Filmhouse	%	GFT	%	MacRobert	%	Eden Court	%	Steps	%	Robert Burns	%	Adam Smith	%	Total
Box Office Income	402,626	52	411,969	61	68,441	41.2	109,176	85	42,490	43.5	42,711	57.3	35,817	90	1,113,230
Other Trading Income	178,888	23	20,559	3	10,485	6.4	2,682	2	4,580	4.7	2,369	3.2	0		219,563
Sponsorship Grants	33,254	4	18,165	2.5	0	0	0	0	0	0	0	0	0		51,419
SS Revenue	96,818	12	111,258	16	17,450	10.5	15,375	13	15,000	15.3	6,053	8.1	4,000	10	265,954
SS Project	483	0	0	0	13,000	7.8	0	0	0	0	0	0	0		13,483
Local Authority Revenue	38,649	5	45,400	6.5	0	0	0	0	35,700	36.5	23,452	31.4	0		143,201
Local Authority Grant	0	0	3,962	1	0	0	0	0	0	0	0	0	0		3,962
Other	29,642	4	69,400	10	24,117	14.5	0		0	0	0	0	0		123,159
Venue Allocation	0	0	0	0	32,665	19.6	0		0	0	0		0		32,665
Total Income	780,360	100	680,713		166,158	100	127,233	100	97,770	100	74,585	0	39,817	100	1,966,636
Total Expenditure	742,522	95	677,904		166,158		101,329		97,770		74,585		39,817		1,900,085
Surplus/Deficit	37,448	5	2,809		0		25,904		0		0		0		66,161

Scottish Screen Subsidy Per Seat Sold 1997/1998

Filmhouse	GFT	MacRobert	Eden Court	Steps	Robert Burns	Adam Smith	Average
0.64	0.75	0.59	0.52	0.87	0.23	0.34	0.64

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Share Of Total Costs Between Grant Income And Earned Income 1997/1998

	Total Earned Income	%	Total Grant Income	%
Filmhouse	614,768	79	165,692	21
GFT	508,946	75	171,767	25
MacRobert Arts Centre	78,926	47.5	87,232	52.5
Eden Court Theatre	111,858	87	15,375	13
Adam Smith Theatre	38,843	90	4,000	10
Steps Theatre	47,070	48	50,700	51.8
Robert Burns Theatre	45,080	60.4	29,505	39.5
Total	1,445,491	69.6	524,271	30.4

Cinemas Supported By Scottish Screen 1999

Name	Location	Screens	Seats	Comments
Filmhouse	Edinburgh City Centre	3	280/97/73	Full time
GFT	Glasgow City Centre	2	404/144	Full time
MacRobert Arts Centre	University of Stirling	1	495	Part time or occasional screenings
Eden Court Theatre	Inverness	2	797/84	Full time in small screen. Very occasional screenings in larger theatre auditorium
Adam Smith Theatre	Kirkcaldy	1	475	Part time or occasional screenings
*Steps Theatre	Dundee	1	250	Part time or occasional screenings
Robert Burns Theatre	Dumfries	1	67	Part time or occasional screenings
Dundee Contemporary Arts	Dundee	2	217/77	Full time

*The Steps Theatre has been superseded by Dundee Contemporary Arts which opened in Autumn 1999.

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Annual Paid Admissions to Regional Film Theatres in Scotland

	1994/95	1995/96	1995/96	1995/96
UK (25 theatres)	1,430	1,405	1,455**	1,482**
Scotland (7 theatres)	396	369	395	416
RFT admission as a % of UK RTF Total	27.7%	26.3%	27%	28%

Source: British Film Institute, Scottish Screen
These figures do not include admissions to festivals such as the Edinburgh International Film Festival.
**This is an estimate.

The 7 Regional Film Theatres in Scotland receive funding from Scottish Screen in 1998/99 as follows:

- Eden Court Theatre in Inverness 105,700
- Robert Burns Centre in Dumfries 92.000
- Filmhouse in Edinburgh 17,500
- Glasgow Film Theatre in Glasgow 16,400
- MacRobert Arts Centre in Stirling 6,000
- Steps Theatre in Dundee 42,000
- Adam Smith Theatre in Kirkcaldy 4,000

The Edinburgh International Film Festival

Screenings at and Admissions to the Edinburgh International Film Festival (EIFF)

	1994	1995	1996	1997	1998
Films					
Features*	110	130	106	148	106
Shorts	56	113	154	214	118
Documentaries	38	17	30	16	23
Animation	81	33	35	45	48
Film Information					
World Premieres (Features)	10	12	14	18	12
Countries Represented	39	33	36	45	31
Scottish Films	21	22	43	37	37
Delegates					
Attending EIFF	131	183	350	305	250
No of NBX Delegates**	-	216	230	276	298
Audience					
Tickets Sold	28444	29856	34859	34527	50134

Source: Edinburgh International Film Festival
* For EIFF, a feature film must have a minimum duration of 60 mins.
** NBX is the New British Expo which takes place at the Edinburgh International Film Festival. This gives British film-makers and international talent spotters the opportunity to connect with each other and forge new relationships.

10 | Case Study 2: City Screen

Introduction

With cinemas in London; in Clapham and Stratford; Oxford, Cambridge, Exeter, York, Brighton, Southampton and a number of smaller markets, City Screen has the strongest claim in the UK independent exhibition sector to a national presence. Some of these cinemas were existing cinemas that are now owned or operated by City Screen, sometimes in partnership with local authorities. Some are new builds reflecting City Screen's ongoing confidence in itself and the sector.

The company also operates the Curzon cinemas in Central London, including the newly refurbished Curzon Soho, the Minema in Knightsbridge and manages the Richmond Filmhouse. Perhaps most significantly of all, it has an ongoing programme of active cinema development, with projects in Aberdeen, Birmingham and Liverpool in the pipeline[48].

Art House Cinema Circuits in the UK

Although the dimensions of the art house market in the UK has not changed considerably since the mid 1990s there are some encouraging signs. At the level of infrastructure in cultural cinema, current developments by City Screen and other art house circuit operators, suggest that more cities in the UK which instinct says should have art cinemas will have them in the future. Improvements already made in tapping potential markets seem to be laying the foundations for a more-profitable industry, so, too, is the restraint on costs evident in the sector.

In part, this improvement has been driven by downward pressure on staff costs, certainly since 1995. This is doubly important because staff costs in the art house sector in the UK generally weigh more heavily than in the mainstream commercial sector. Concession revenues tend to be lower and more labour intensive to deliver, and as more of the circuits are smaller, there are only limited opportunities for cost saving by centralising functions at head office.

Selected Art House Circuits' EBITDA* 1994-1998

£000	1994	1995	1996	1997	1998
Artificial Eye Cinema	-90	-74	-18	283	-221
Bloom Theatres	147	47	134	222	120
GCT (Management)	-40	205	134	307	274
Metro Cinemas	22	-12	42	18	na
Oasis Cinemas	-227	21	308	458	na
Tyneside Film Centre	23	35	29	15	na
Total	-165	222	629	1303	na

Source: Cinemagoing 8 Dodona Research 2000

[47] *City Screen opened the three-screen Picture House in Birmingham in November 2000, the three- screen Belmont Cinema in Aberdeen in partnership with Aberdeen City Council and Scottish Screen in December 2000 and is developing the three-screen FACT cinema in Liverpool.*

** See Footnote [48]*

10 | Case Study 2: City Screen

The net result of the improvement in profitability in the sector in recent years has been to transform it from one which might be characterised as a hobby business, or at least as no more than a living, into one where the possibility of appreciable profits exists. Although not generally on the scale available from operating commercial multiplex cinemas in the UK, in some instances EBITDA [48]margins from art houses are beginning to compete with the less-profitable larger circuits, and certainly with those in the mature North American industry.

City Screen Financial and Operating Performance 1997-1998

£000	1997	1998
Gross Profit	832	1036
Administration	-472	-604
Interest Payable	-3	-4
Pre-tax profit	357	428
Depreciation	-20	-27
EBITDA	380	459
Staff Costs	-389	-505
Staff #	27	31

Note: years to December
Source: Cinemagoing 8 Dodona Research 2000

Although City Screen takes advantage of limited disclosure rules relating to smaller companies in the UK, such information as it does disclose reveals that it is now making substantial profits. City Screen's cashflow measured on an EBITDA basis was Stg£380,000 in 1997 and Stg£480,000 in 1998. Although perhaps dwarfed by the profits available from exhibiting mainstream commercial films, the art house sector is nevertheless now offering the prospect of substantial profits to operators.

The directors of City Screen are Tony Jones, Lynn Goleby and Roger Wingate of GCT (Management). Formerly a subsidiary of Chesterfield Properties, GCT is among the entertainment interests of that group bought by Roger Wingate. Despite falling cinema box office since 1996 the company has been solidly profitable for the past four years.

Among the former entertainment interests of Chesterfield bought by Wingate, is a long-standing stake in City Screen, towards which the group acted in a kind of venture capitalist role.

Company Strategy

City Screen's company strategy for expansion has been a common-sense one, though by no means easy to execute, focusing on university cities and building attractive cinemas for a relatively modest capital investment. University cities with high student populations, an overall population level of not less than 100,000 and with no other cultural cinemas have been the key factors in determining new builds/sites, for example in Cambridge and York. The presence of commercial cinemas in an area is not seen as a negative factor; indeed, any habit of cinema-going is positive.

However, City Screen is in the process of changing this policy with its planned opening of a three-screen Picture House in November 2000 in Birmingham, which already has a two- screen art house in the MAC cinema.

City Screen also uses its programming of key cultural cinemas in London to its advantage. Since London sets the agenda for art house releases, City Screen's relationship with distributors ensures access to new product and increased bargaining power when booking titles.

Picture Houses

The programmes of individual cinemas vary in the balance between art and mainstream titles depending on where the cinemas are located. Programming is, however, consistent in all the cinemas. City Screen identifies its success as the result of two factors, the films programmed and the surroundings in which the film is shown. Films range from art house and independent film to Hollywood blockbusters, family favourites and repertory titles. The cinemas are not club cinemas and generally play reasonably open-ended runs of films.

While City Screen aims to build local cinemas capable of responding to local circumstances and demands, branding of the Picture House cinemas as an independent exhibition chain has been a notable feature of its development since 1989.

[48]Earnings before interest, tax, depreciation and amortization) basis – the most-popular valuation method for multiplex operators, given that interest and depreciating cinemas are their major expense items.

10 | Case Study 2: City Screen

Every Picture House has a café-bar and these ancillary operations are a crucial part of the overall image and economics of the cinema. Each cinema has membership loyalty schemes and Saturday morning children's clubs which have regular newsletters and which encourage members to take an interest in an associated local charity. In addition, some Picture Houses run educational programmes.

Each cinema publishes a monthly printed programme, which features independent reviews of up-coming films, information about the cinema, details about special events, film seasons, and Picture House clubs (such as "'Silver Screen" for senior citizens).

City Screen has been quick to exploit the benefits of the internet and increasingly the film programmes are supported by City Screen's own website. With the facility of online booking and direct customer to cinema e-mail transactions the internet is playing an ever-growing role in the company's marketing policy.

Funding Issues

City Screen has also been quick to identify sources of funding and has worked with local authorities that wish to retain or develop cinema facilities in their local area. It benefited considerably from National Lottery funding administered by The Arts Council of England (ACE) through Capital Programme1 (CP1).

CP1 has resulted in the distribution of 2,021 awards with a total value of more than Stg£1 billon since its inception in the spring of 1995. Awards have been made across England in all art forms, reflecting a variety of cultural aspirations and located in a diversity of urban and rural settings.

The availability of such substantial amounts of funding for capital projects has kick-started City Screen's expanding exhibition activities. City Screen received five individual awards through the CP1 programme amounting to Stg£3,859,460. The awards were allocated for refurbishment/conversion to cinema usage for projects in London, Exeter, Brighton and Cambridge. However changes within CP2, involving more strategic soliciting of projects as well as less overall funding for capital projects makes this source of funding less likely in the future.

Critical in achieving these awards has been a commitment to providing a range of cinema, with a particular emphasis on film education, not normally seen in commercial cinemas. In Cambridge, funding was allocated for a third screen provided there was a commitment to devising an educational programme and a specific person is now employed to facilitate this.

City Screen worked with local authorities in one of its first cinema projects, The Maltings Cinema at Ely. There the local authority was committed to developing a cinema provision for the area and contributed Stg150,000 in the early 1990s for the conversion of a malting building. City Screen provided Stg£35,000 for a 35 mm projection box. The Maltings Cinema at Ely is now programmed and managed as a Picture House cinema.

City Screen's new three-screen cinema in Cambridge, the Arts Picture House, is located on the premises of a former five-screen commercial cinema, which is also occupied by a newly established superpub. City Screen had actively lobbied the local authority to retain cinema activity following the closure of an earlier mainstream cinema on the site. The resulting combination of uses represents a compromise on the part of the local authority between more commercial demands and a wish to include social and responsible leisure facilities in the town centre.

Private/Public Partnerships

The effectiveness of the City Screen network of cinemas has made it attractive in terms of partnership arrangements, aimed at delivering cultural programming nationally. The *bfi* in its consultation document on exhibition[50] strategy highlights the potential for partnerships with the private sector to advance cultural cinema programming.

"The strategy seeks to develop new partnerships with multiplexes and other exhibitors targeted towards increasing our reach into more mainstream audiences"

The *bfi* has already worked with City Screen in developing the two-screen Picture House cinema in Exeter.

[50] *Brett, Paul, UK-Wide Cinema Exhibition Strategy Consultation Document (British Film Institute, June 1999).*

10 | Case Study 2: City Screen

Indeed two of the strongest RFTs in the *bfi* "circuit" – Filmhouse Edinburgh and Glasgow Film Theatre (GFT) – have already initiated discussions with City Screen to establish closer links. They believe closer collaboration will guarantee access to the higher-profile film titles more easily and crucially, may be able to ensure that more prints are struck. The advantages for City Screen are less evident, but any link would give it even more bargaining power with distributors and would consolidate its already strong position in the marketplace.

Scottish Screen and Aberdeen City Council in partnership with City Screen opened a three-screen cinema complex in Aberdeen in November 2000. Naturally, such partnerships need to be able to guarantee that public funding requirements, in terms of broadening the range of cinema, increasing access or providing quality educational programmes will be met.

Conclusions

In many respects the City Screen experience mirrors that of the Point, the UK's first multiplex that collected many ideas in a single place so they were easy to identify and test by people who weren't trying them. It is not that other cinemas or other independent cinema chains were not engaged in similar activity but that City Screen incorporated these ideas early into a strategy, which it has aggressively and successfully pursued.

Equally importantly City Screen has sought to build audiences through branding and recognition of the Picture House cinema chain.

Its knowledge and understanding of the cultural cinema sector allowed it to spot the gap in the market and exploit it. Importantly it is familiar with the product and comfortable in programming, scheduling and marketing cultural films. The lessons identified in our examination of multiplex developments were understood and adapted to fit the market, good quality presentation in appropriate surroundings screening a considered selection of films. In this they have reflected the example set by multiplex exhibitors in terms of confidence building investment that supports a clear commitment to higher standards of presentation and improved viewing conditions.

10 | Case Study 3: UK Network Models

Cinema Forums, Consortiums, Regional Exhibition Development Officer, The British Film Institute

Cinema Forums

Regional cinema exhibitors' forums exist in several parts of the UK - South West England, Yorkshire and The Highlands and potentially in East Kent. A cinema exhibitors' forum also exists in Northern Ireland with the Northern Ireland Film Commission acting as the host group. These forums are organised to suit regional circumstances and as a result they differ in size, style of operation and purpose.

The forums in the South West and in Yorkshire are made possible by the presence of existing cinemas, arts centres and multi-use venues. These organisations find it beneficial to meet a few times each year to discuss topics of interest and concern and, from time to time, to work together on specific projects.

The forums in the Highlands and Islands and in East Kent represent a different approach to a cinema forum. In these instances the participants are mainly arts organisations, local authorities and educational institutions along with a few cinemas or film societies. Their reasons for meeting are more to do with creating new cinemas and stimulating developments, such as a film festival, in other cinema-capable venues.

The number of venues required for a successful forum appears to depend on the aims of the group — why it exists and what constituency it wishes to attract. A broad set of policies and objectives will attract a wider range of members than an alternative, more narrowly focused forum.

Purpose of the Cinema Forum

A cinema exhibitor's forum can have a wide range of regionally relevant purposes but overall the aims tend to fall into the following categories:

Networking with colleagues
Skill sharing and training
Project development
Film viewing
Cinema development
Feedback to funding organisations.

Costs and Benefits of a Cinema Forum

The central costs of a regional cinema exhibitors forum consists of the hiring of a venue for the meetings, administration costs, telephone and mailing costs, and perhaps a fee to the organiser. Overall these costs should be small and capable of being met by member subscriptions plus, optionally, funding from a relevant organisation such as a regional arts board or local authority.

An individual participant's expenditure will consist mainly of travelling and accommodation costs although the time taken to attend the meeting must also be taken into consideration.

As indicated above the main benefit for participants is the opportunity to meet colleagues. Added to this is the opportunity to discuss projects of mutual interest and to attend training sessions and in some instances specialised film screenings.

Organisational Focus of a Cinema Forum

Cinema exhibitors' forums in the UK tend not to have their own staff or premises. Instead, they rely on collaborative efforts and, usually, one central driving force with the often-difficult task of co-ordinating the meetings. This represents a blend of administrator, publicist and chairperson roles and is most commonly handled by a non-cinema organisation or individual — for example, by a regional arts board or local authority officer.

Marketing Issues for a Cinema Forum

The informal and infrequent nature of these forums militates against significant joint or collaborative marketing activities. Nonetheless, where members support a project there are good reasons to devise a marketing campaign. In most instances these forums operate in remote or rural areas and it is often difficult for individual venues to achieve a substantial marketing impact for specialist activities. However, working as a group, on a project such as a short films tour or a local film festival is more likely to attract support and news coverage than otherwise.

Staffing a Cinema Forum

There are not normally any full-time or part-time staff employed by regional cinema exhibitors' forums in the UK. The number of meetings is too infrequent and the joint activity level is too episodic to justify permanent staff.

10 | Case Study 3: UK Network Models

Cinema Consortiums

A regional cinema consortium consists of a group of cinemas or arts centres working collaboratively to improve the range and quality of their cinema activities.

In contrast to the forums described above, regional cinema exhibitors' consortiums represents a different, more-formalised structure involving the payment of membership fees. In return, members receive specified services from the Consortium's staff.

By focusing resources, such a consortium would expect to undertake projects that were beyond the capabilities of any one member. Projects could include market research, formal and informal educational activities, UK Lottery-funded projects, and specialised programming initiatives. Within the UK there exists only one cinema exhibitors consortium, the Lincolnshire Cinema Exhibitors' Consortium.

The Consortium is the result of a partnership between arts centres in Lincolnshire together with the British Film Institute, East Midlands Arts Boards, Lincolnshire County Council and four district councils. The funding partners became involved in order to further their cultural and educational policies.

Each Consortium member pays a membership fee — partly related to the number of films they book — which, together with grants, allows a co-ordinator to be employed. The co-ordinator provides a range of film programming and marketing services and is responsible for the management of the Consortium.

A critical concern for the Consortium is that it should provide more than just booking services for its members. To date marketing activities — promotions and market research — have been co-ordinated and a successful application has been made to the UK Lottery's "Arts for Everyone" programme to support film education initiatives by the Consortium cinemas. It is unlikely that an individual cinema would have been successful with this bid.

Lincolnshire has a strong local sense of identity but has below average cinema provision compared to the rest of the UK, particularly in respect of cultural or specialist cinemas. Before the Consortium was established the arts centres had been working together on an ad hoc basis. Both the bfi and Eastern Arts Board feel that the crucial factor for a viable regional cinema consortium is a prior commitment by the participant venues to work together.

Currently there are six equal-status venues — four arts centres and two former film theatres — all offering cinema on a part-week basis. The original concept included six arts centres, four or five independent cinemas and a number of film societies. The member cinemas operate on a relationship-of-equals basis. This is identified as a particular strength of the Consortium.

Although the Consortium is well known to its members and funders it is less well known to the audiences who attend the screenings. This lack of a brand image is difficult to resolve since any attempt at strengthening the Consortium brand reduces the venues' own brands. Nevertheless, in a predominantly rural region there are opportunities for centralised information and cross-marketing of each others' programmes so that audiences can see their film of choice on a wider range of dates. In Ireland cultural cinema venues are likely to be some distance from each other so that developing a strong overall brand image would be a very positive step rather than one that generates competition between venues.

Programming Issues for Consortiums

Unfortunately, some arts centres in the UK have treated film screenings as a low cost/high-earning alternative to live performances. In such venues, cinema screenings provide a crucial income source to be used as a cross-subsidy for other art forms.

Where cinema box-office targets are set at high levels, it is often difficult to get venues to accept specialist programming along with additional, costly activities such as programme notes, education courses and technical improvements.

Issues of programming are at the core of any individual cinema's activities. Unless cinemas can be assured that they can access the more-commercial art house films their chances of survival are poor. Cinemas have to profit from those specialised films which appeal to a broad public and are supported by larger marketing spends.

Balancing commercial and cultural requirements is difficult but, in an increasingly competitive exhibition environment, cultural cinemas can emphasise their individuality and personality by means of specialised programming while still satisfying their need to generate revenue with more-commercial fare.

10 | Case Study 3: UK Network Models

Working as a consortium of cinemas can provide an answer to some of these concerns without damaging venues' budget targets. Unified funding can be secured for Consortium projects and enhancements such as programme notes or education events can be provided to each venue at lower unit cost. In other words, an exhibitor's consortium can become a productive vehicle for introducing a range of cultural and educational activities to venues, which would otherwise concentrate on commercial releases.

Regional Exhibition Development Officers

Regions which have a diverse range of arts, cinema and social facilities and which have many small, remote communities are likely to find that a cinema exhibitors' forum or consortium is inappropriate. In such circumstances a more-flexible and appropriate strategy might be to employ a cinema exhibition development officer. The officer would have a broad remit to encourage and assist a range of cinema activities in the region.

A development officer requires a host organisation (although not necessarily an office, they may work from home), a management structure to provide direction for the development activities, and funding for salaries, expenses and projects.

Local circumstances will play a large part in determining where a development officer is based and what their specific objectives are. Capital development may be the primary focus in some cases but other areas such as audience development, training, programming assistance, funding advice, marketing, or the use of computer technology may also be involved.

An increasingly important aspect of modern management skills concerns networking — creating and using opportunities to meet colleagues and new people. Cinema and arts workers have long recognised the value of meeting colleagues from other parts of the country.

The British Film Institute^

Proposals to put finding directly from the UK's new film Council to the regions are currently being implemented and affect the bfi's Regional planning functions and funding role. The key supplier of cultural programming in the UK is the *bfi.* One of the highest profile aspects of bfi exhibition spend is its engagement with the regional film theatres (RFTs) network. It is a widespread misapprehension that the bfi owns cinemas; in fact there is only one *bfi*-owned cinema – the National Film Theatre on London's South Bank. The RFTs identified as the "bfi circuit" are actually a loose network of like-minded but legally independent cinemas, with which the bfi has long-standing financial and service links.

Recently the *bfi* has begun to look closely at its relationship with these cinemas.[51]

The *bfi* accepts that relationships between it and its various partner cinemas have evolved very little over recent years and they are actively attempting to address this. They also accept that current partnerships between the independent cinemas and the bfi have been almost exclusively based on revenue as opposed to capital investment. This, coupled with under-investment in the capital needs of the sector as a whole from other funding sources, has resulted in a range of venues with vastly different levels of technical competency and customer comfort. In an age of increasing commercial competition in most RFT locations, this has resulted in a trend towards static or decreasing audiences.

The *bfi* argues that there is a lack of an effective operational structure to programme and book first runs (i.e. the bfi does not have the authority to book larger cinemas as a "circuit"). This situation then prevents the bfi and the cinemas from fully exploiting potential distribution partnerships.

However, the disparity noted above between individual cinemas, and the fundamental change in the nature of the relationship between these cinemas and the *bfi*, will make establishing a chain extremely difficult. The *bfi* itself admits that, with limited resources, it should consider concentrating on identifying a number of key venues as "centres of excellence" mindful of the need to achieve a good geographical spread.

The danger is that smaller, less-successful cinemas will be left behind or neglected, while larger, more-successful venues will forge ahead. Indeed the more-successful independent cinemas have already been discussing the question of forming an alliance with the commercial independent cinema operator, City Screen (the subject of Case Study 2), to gain earlier and better access to the more-commercial art house hits.

It is important to note that the relationship between the *bfi* and these cinemas is a long one based on a particular history that will necessarily undergo change and development. However, it is one example of a centralised structure, centrally located and working to develop regional film exhibition.

[51] *ibid.*

^ *Proposals to put funding directly from the UK's new Film Council to the regions (or nations) are currently being implemented and will end this aspect of the bfi's regional planning functions and funding role.*

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Appendix I

The invitation to tender to undertake this study, which was circulated to prospective consultants by The Irish Film Board/Bord Scannán na hÉireann, outlined the aims and proposed methodology as follows:

Feasibility Study into art house cinema exhibition in Ireland

The Arts Council, The Irish Film Board and Enterprise Ireland, in liaison with the Northern Ireland Film Commission, are commissioning a feasibility study into the development of a circuit/network of art house cinemas in regional areas of Ireland, North and South, to increase access to Irish and international film.

Terms of Reference

The study will examine the options and feasibility of creating a cost-effective network of independent art house cinemas, with a view to widening the choice for cinema audiences throughout Ireland. It will identify and rank the most appropriate and sustainable population centres and venues in which such cinemas could be located and will consider and make recommendations on the core administrative and marketing functions.

Methodology

Establish the response to such an initiative on the part of existing film exhibitors by means of a carefully designed questionnaire.

Prioritise areas and venues for further investigation on the basis of this response and select a Phase 1 grouping.

Assess viability by determining high level capital and other start-up costs[52] and ongoing financial viability for each of the cinemas/venues.

Examine existing art house exhibition – key success factors.
Examine patterns and views on film availability – will there be sufficient and satisfactory supply of films?

Focus on a comparison of existing provision with networks of art house cinema in other countries in a focused manner.

Examine the possibilities for shared administration/marketing/co-ordination services – will there be a need for a co-ordinating administrative function, and if so, at what cost?

Consultants' comment on constraints

On the basis of budgetary constraints, the commissioning consortium accepted some limitations to the scope of the study, which were outlined by the consultants as follows:

With regard to offering estimates as to the costs of converting or erecting cinema buildings, (the consultants') proposal does not contemplate assessing venues that are not in their existing form physically viable for use as cinemas. Nor does it envisage assessing potential venues that would require extensive input from architects and quantity surveyors to arrive at an accurate cost of conversion. Such work would effectively constitute a project in itself.

[52] *The commissioning consortium accepted constraints on this, which are outlined below.*

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Appendix II

Federation of Irish Film Societies Member Societies, Winter 2000

Film Society	Location	Venue	Format
Midnight Court	Scariff, Co. Clare	Hotel	DVD/Video
Cinematek	Co. Cork	Triskel Arts Centre	35 mm
Sulan	Macroom, Co. Cork	Briery Gap Theatre	35 mm
West Cork Arts Centre	Skibbereen, Co. Cork	West Cork Arts Centre	16 mm
Letterfrack	Letterfrack, Co. Donegal	Heritage Centre	16 mm/Video
Law Society of Ireland (Law School)	Dublin, Co. Dublin	College	DVD/Video
Rockabill	Skerries, Co. Dublin	Yacht Club	16 mm
Galway	Galway, Co Galway	Town Hall Theatre	35 mm
Kenmare	Kenmare, Co. Kerry	Hotel	16 mm
Belltable Film Club	Limerick, Co Limerick	Belltable Arts Centre	16 mm/35 mm
University of Limerick	Limerick, Co. Limerick	University	DVD
Linenhall	Castlebar, Co. Mayo	Linenhall Arts Centre	16 mm
Sligo	Sligo, Co. Sligo	Model Arts and Niland Gallery	35 mm
South Tipperary	Clonmel, Co. Tipperary	South Tipperary Arts Centre	DVD
Waterford	Waterford, Co. Waterford	Garter Lane Arts Centre	35 mm
Tinahely	Tinahely, Co. Wicklow	Tinahely Courthouse Arts Centre	16 mm/DVD/Video
Wexford	Wexford, Co. Wexford	Wexford Arts Centre	16 mm

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Appendix III
Arts Centres/heritage centres in the Republic of Ireland with 35 mm screening facilities or planning to incorporate them in the near future (within 3-5 years).

Venue	Location	Venue Size	Notes on Film Programmes	Opening Date
Ballymun Arts & Community Resource Centre	Ballymun,Co. Dublin	220 seats	To include art house element	June 2001
Triskel Arts Centre	Cork, Co. Cork	70 seats	Programmed by Music & Film Programmer with FIFS support.	Currently operating
Briery Gap	Macroom, Co. Cork	200 seats	Mainstream cinema screenings/FIFS screenings/shared theatre space	Currently operating
Dunamaise Theatre & Centre for the Arts	Portlaoise, Co. Laois	220 seats	Currently theatre space/may incorporate 35mm screening facilities	Currently operating
Town Hall Theatre	Galway, Co. Galway	340 seats	FIFS screenings/Galway Film Fleadh/children's screenings	Currently operating
Cluain Mhuire	GMIT, Galway, Co. Galway	200 seats	Shared with education requirements/ art house/community screenings	2001
Belltable Arts Centre	Limerick, Co. Limerick	100 seats	Dedicated art house screen	2002/2005
Model Arts and Niland Gallery	Sligo, Co. Sligo	110 seats	FIFS screenings/shared space with theatre	Currently operating
New Excel Centre	Tipperary, Co. Tipperary	380/160/104 seats	Proposed to include art house element in smallest screen	2001
Garter Lane Arts Centre	Waterford, Co. Waterford	176 seats	FIFS screenings/additional Pilot screenings organised by Arts Centres shared space with theatre	Currently operating

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Appendix IV

Les Convoyeurs attendent Distributor: Artificial Eye Print Run: 6 UK & Ireland
Opening date in UK and Dublin: 31 March, 2000

Week Commencing	31 March Week 1	7 April Week 2	14 April Week 3	21 April Week 4	28 April Week 5	5 May Week 6
Renoir, LONDON WEST END	•	•	•	•	•	•
Curzon Soho, LONDON WEST END	•	•	•	-	-	-
Cinè Lumière, LONDON SW7	•	•	-	-	-	-
Filmhouse, EDINBURGH	•	•	-	-	-	-
Arts Picture House, CAMBRIDGE	•	•	-	-	-	-
Queens Film Theatre, BELFAST	•	-	-	-	-	-
Irish Film Centre, DUBLIN	-	•	•	-	-	-
Duke of York, BRIGHTON	-	-	•	-	-	-
Phoenix Picture House, OXFORD	-	-	•	•	-	-
Harbour Lights, SOUTHAMPTON	-	-	-	•	-	-
Chapter Arts, CARDIFF	-	-	-	•	-	-
Glasgow Film Theatre, GLASGOW	-	-	-	-	•	-
Broadway Media Centre, NOTTINGHAM	-	-	-	-	•	-
Waterman Arts Centre, BRENTFORD	-	-	-	-	-	•
Cornerhouse, MANCHESTER	-	-	-	-	-	•
Picture House, EXETER	-	-	-	-	-	-
Cinema City, NORWICH	-	-	-	-	-	-
Rio, Dalston, LONDON E8	-	-	-	-	-	-
City Screen, YORK	-	-	-	-	•	-
Pictureville, BRADFORD	-	-	-	-	-	-
Midland Arts Centre, BIRMINGHAM	-	-	-	-	-	-
Showroom, SHEFFIELD	-	-	-	-	-	-
Duke's Playhouse, LANCASTER	-	-	-	-	-	-
Picture House, EXETER	-	-	-	-	-	-
Plymouth Arts Centre, PLYMOUTH	-	-	-	-	-	-
Watershed, BRISTOL	-	-	-	-	-	-
Cinema City, NORWICH	-	-	-	-	-	-

Source: http://www.artificial-eye.com/Light House

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Rosetta Distributor: Artificial Eye Print Run 11: UK & Ireland

Week Commencing	25 Feb Week 1	3 March Week 2	10 March Week 3	17 March Week 4
Renoir, LONDON WEST END	•	•	•	•
Curzon Soho, LONDON WEST END	•	•	•	•
Phoenix, East Finchley, LONDON N2	•	•	-	-
Ritzy, Brixton, LONDON SW2	•	•	-	-
Metro, London West End	•	•	•	•
Arts Picture House, CAMBRIDGE	•	•	-	-
Filmhouse, EDINBURGH	•	•	-	-
Glasgow Film Theatre, GLASGOW	•	•	-	-
Duke of York, BRIGHTON	•	•	-	-
Irish Film Centre, DUBLIN	•	•	-	-
Cinè Lumière, LONDON SW7	-	•	•	-
Rio, Dalston, LONDON E8	-	-	•	-
Phoenix Picture House, OXFORD	-	-	•	•
Harbour Lights, SOUTHAMPTON	-	-	•	-
Cornerhouse, MANCHESTER	-	-	•	•
Picture House, EXETER	-	-	-	•
Queens Film Theatre, BELFAST	-	-	-	•
Chapter Arts, CARDIFF	-	-	-	•
Cinema City, NORWICH	-	-	-	•
Waterman Arts Centre, BRENTFORD	-	-	-	•

Source: www.artificial-eye.com/Light House

Appendix V

bfi @ Odeon

In its UK-Wide Cinema Exhibition Consultation Document by Paul Brett, Head of Cinema Services at the British Film Institute, published in June 1999, the bfi restated its commitment to audience development for cultural cinema.

Their strategy has two objectives: to reach a broader audience, with a wider range of films. While the strategy wishes to maintain existing cultural partners, principally the Regional Film Theatres, it also seeks to develop new partnerships with multiplexes and other exhibitors targeted towards increasing the reach into more-mainstream audiences.

The first evidence of this is a new initiative launched by the bfi to "bring art house films to the high street" by linking up with three major multiplex operators in the UK. The first of these is Odeon Cinemas, which began the scheme at eight cinemas around the UK from April 28 2000 (see below). These areas were chosen because of the growing demand by cinemagoers for greater choice and variety arising out of research undertaken by Odeon Cinemas.

The bfi programmes one screen at each of the eight Odeon's on a daily or weekly basis. Showing in the initial run are new releases such as Kimberly Pierce's *Boys Don't Cry* starring Oscar-winning Hilary Swank and Jane Campion's *Holy Smoke!* Film classics including Powell and Pressburger's *A Matter of Life and Death* (1946) (which has been re-released by the *bfi)* and John McKenzie's *The Long Good Friday* (1981) will also be screened.

In addition, the *bfi* is planning to run a series of themed film festivals at these Odeons. These may celebrate the works of directors such as Alfred Hitchcock or actors such as Humphrey Bogart or showcase films from a single country.

Other multiplexes have expressed interest in the initiative. In July 2000 Warner Village Cinemas opened Europe's largest multi-screen cinema, the 30 screen Star City in Birmingham, where the *bfi* will programme three screens in a dedicated section of this cinema - Movies on the Mezz. The *bfi* is keen to state that accessibility is the key issue and that there is no exclusive arrangement with any one multiplex operator.

The pilot project with the Odeon cinemas is expected to run for at least 12 months. The *bfi's* booking department will undertake the programming, including film rental negotiation. The *bfi* does not expect the scheme to be a revenue generating exercise for the institute but part of its audience-development programme. Films screened will range from the more-accessible end of the art house and independent market to more-difficult and foreign language material.

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bfi @ Odeon

- Odeon Cinema, New Street, Birmingham
- Odeon Cinema, Westover Road, Bournemouth
- Odeon Cinema, Winchcombe Street, Cheltenham
- Odeon Cinema, Upper High Street, Epsom
- Odeon Cinema, Bedford Road, Guildford
- Odeon Cinema, St. Margaret's Street, Ipswich
- Odeon Cinema, London Road, City Centre Liverpool
- Odeon Cinema, Barker Road, Lockmeadow, Maidstone

Typical scheduled screenings are shown below:

Showing at Odeon, New Street, Birmingham

Week Commencing	
Fri April 28	In all Innocence *[Pierre Jolivet, France, 1998]*
Fri May 5	Show Me Love *[Lukas Moodysson, Sweden/Denmark, 1998]*
Fri May 12	Boys Don't Cry *[Kimberley Pierce, USA,1999]*
Fri May 19	Sunshine *[István Szabó, Hungary/Germany/Canada/Austria/UK, 1999]*
Fri May 26	The Long Good Friday *[John McKenzie, UK, 1980]*
Fri Jun 2	The Last September *[Deborah Warner, Ireland/UK, 1999]*
Fri Jun 9	Nora *[Pat Murphy, Ireland/UK, 2000]*
Fri Jun 16	The Filth & the Fury *[Julien Temple, UK, 2000]*
Fri Jun 23	Sweet and Lowdown *[Woody Allen, USA, 1999]*
Fri June 30	One Day in September *[Kevin McDonald, UK, 2000]*
Fri July 7	Not One Less *[Zhang Yimou, China, 1999]*
Fri July 14	Kikujiro *[Takeshi Kitano, Japan, 1999]*
Fri July 21	Jesus' Son *[Alison MacLean, USA, 1999]*
Fri July 28	Night Train *[John Lynch, Ireland, 1998]*

Showing at Odeon, Westover Road, Bournemouth

One day only	
Wed May 3	Wonderland *[Michael Winterbottom, UK, 1999]*
Wed May 10	Limbo *[John Sayles, USA, 1999]*
Wed May 17	Ratcatcher *[Lynne Ramsay, UK, 1999]*
Wed May 24	Hurly Burly *[Anthony Drazan, USA, 1998]*
Wed May 31	Open Your Eyes *[Alejandro Amenábar, Spain/France/Italy, 1998]*
Wed June 7	Up at the Villa *[Philip Haas, USA, 2000]*

Showing at Odeon, Winchcombe Street, Cheltenham

One day only	
Wed May 3	All About My Mother *[Pedro Almódóvar, Spain, 1999]*
Wed May 10	Ratcatcher *[Lynne Ramsay, UK, 1999]*
Wed May 17	Limbo *[John Sayles, USA, 1999]*
Wed May 24	Wonderland *[Michael Winterbottom, UK, 1999]*
Wed May 31	Open Your Eyes *[Alejandro Amenábar, Spain/France/Italy, 1998]*
Wed June 7	Up at the Villa *[Philip Haas, USA, 2000]*

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Showing at Odeon, Upper High Street, Epsom

One day only	
Wed May 3	All About my Mother [Pedro Almódóvar, Spain, 1999]
Wed May 10	Limbo [John Sayles, USA, 1999]
Wed May 17	Ratcatcher [Lynne Ramsay, UK, 1999]
Wed May 24	The Buena Vista Social Club [Wim Wenders, Germany, 1999]
Wed May 31	Wonderland [Michael Winterbottom, UK, 1999]
Wed June 7	Up at the Villa [Philip Haas, USA, 2000]

Showing at Odeon, Bedford Road, Guildford

One day only	
Tues May 2	Special Event: Born Free [James Hill, UK, 1966]
Wed May 10	Limbo [John Sayles, USA, 1999]
Wed May 17	Ratcatcher [Lynne Ramsay, UK, 1999]
Wed May 24	The Buena Vista Social Club [Wim Wenders, Germany, 1999]
Wed May 31	Wonderland [Michael Winterbottom, UK, 1999]
Wed June 7	Up at the Villa [Philip Haas, USA, 2000]

Appendix VI
Number of features by country of origin certified for public screening by the Irish Film Censor 1995-1999

	1995	1996	1997	1998	1999
Total number of films certified	167	185	161	156	169
US	112 (57%)	136 (74%)	115 (71%)	114 (73%)	111(65%)
UK	10	13	27	18	17
France	9	7	1	1	-
Ireland	8	5	1	5	2
New Zealand	2	-	-	-	-
Australia	2	2	1	-	-
Canada		1	1	1	1
Russia	1	-	-	-	-
Germany	1	-	-	-	2
China	2	-	-	-	-
Italy	1	1	-	-	2
Denmark	-	1	-	-	-
Spain	-	1	-	-	-
Iran	-	1	-	-	-
Japan	-	-	1	-	-
Czech Republic	-	-	1	-	-
Brazil	-	-	-	1	-
Totals					
US and UK	122	149	142	132	128
Non US and UK	26 (15.5%)	19 (10.2%)	6 (4%)	8(5%)	7 (4%)
Co-productions	19	19	17	16	34

Source: Irish Film Censor's Annual Reports.

Co-productions are analysed below. Each of the countries listed may be involved in one or more co-productions with other countries per annum. It is becoming increasingly difficult to assign country of origin to films with many co-production partners. In general country of origin is assigned to the country with the highest creative input.

The co-production figures below should be read in this light so that the inclusion of, for example, a co production partner from Japan does not necessarily represent a Japanese film. Data regarding titles of films certified against country or countries of origin are not usually provided from the Film Censor's Office.

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Countries represented in Co-Productions 1995-1999

	1995	1996	1997	1998	1999
Total number of films certified	167	185	161	156	169
Co-productions	19	19	17	16	34
Australia	2	-	1	2	1
Belgium	-	2	-		-
Brazil	-	-	-		-
Canada	-	2	-	2	3
China	-	-	-		1
Czech Republic	-	-	-		-
Denmark	-	-	1		-
Eurimages	2	1	1		-
France	7	7	5	6	7
Germany	5	4	-	3	8
Hungary	-	1	-		-
Iceland					1
Iran	-	-	-		-
Ireland	3	3	3	4	6
Isle of Man	-	-	-	1	-
Italy	-	3	1		2
Japan	-	-	1		1
Luxembourg	1	-	-		-
Netherlands	-	1	-		1
New Zealand	-	-	-		-
Russia	-	-	-		-
Scotland	1	-	-		-
Spain	1	-	-	2	1
Tunisia	1	-	-		-
UK	12	13	8	11	22
US	9	7	12	7	23

Source: Film Censor's Office/Light House

An analysis of feature films presented for certification from 1995-1999 illustrates that US films dominate the Irish theatrical and exhibition market. The number of films from non-English speaking countries has significantly dropped since the mid 90s and the closure of the Dublin art house venue, The Light House Cinema.

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Appendix VII

Full-Time Cinemas in the Republic of Ireland, January 2001

Location	County Town	Population	Cinema	Screens	Seats
Carlow	Carlow Town	14979	Savoy Cinemaplex	3	520
Cavan	Cavan Town	5623	Storm Cinemas	4	775
Clare	Ennis	17726	Empire Movieplex	6	975
Clare	Kilkee	1315	Kilkee Cineplex	3	225
Cork	Ballincollig	179954	The Reel Picture	6	1277
Cork	Clonakilty	2950	The Park	3	510
Cork	Cork City	179954	Capitol Cineplex	6	1021
Cork	Cork City	179954	Kino	1	188
Cork	Cork City	179954	The Gate Multiplex	6	1084
Cork	Douglas	179954	Cinema World	5	1152
Cork	Dunmanway	1500	Broadway	1	280
Cork	Kanturk	1666	Cosey Midiplex	3	248
Cork	Mallow	7768	The Reel Cinema	4	446
Cork	Midleton	6209	Ormonde	2	328
Cork	Youghal	5943	Regal Cineplex	3	512
Donegal	Letterkenny	11996	Letterkenny Cinema	4	637
Donegal	Lifford/Strabane	1359	Cineplex	4	680
Dublin	Blanchardstown	952692	UCI	9	2463
Dublin	Coolock	952692	UCI	10	2284
Dublin	Dublin City	952692	Irish Film Centre	2	375
Dublin	Dublin City	952692	Savoy	6	1984
Dublin	Dublin City	952692	Screen	3	783
Dublin	Dublin City	952692	UGC	9	2337
Dublin	Dun Laoghaire	952692	IMC Cinemas	12	1833
Dublin	Harold's Cross	952692	Classic	2	497
Dublin	Liffey Valley	952692	Ster Century	14	3568
Dublin	Rathmines	952692	Stella	2	413
Dublin	Santry	952692	Omniplex	10	2262
Dublin	Stillorgan	952692	Ormonde	7	1018
Dublin	Tallaght	952692	UCI	12	2980
Galway	Galway City	57363	Omniplex	11	2020
Kerry	Dingle	1340	Phoenix	1	152
Kerry	Killarney	12011	Cineplex	4	848
Kerry	Listowel	3656	Classic	2	249
Kerry	Tralee	19950	Omniplex	4	919
Kildare	Naas	14074	Dara Cinema	2	450
Kildare	Newbridge	13363	Oscar	3	338
Kilkenny	Kilkenny City	18696	Cineplex	4	808
Laois	Portlaoise	9474	Storm Cinemas	5	709
Leitrim	Carrick-on-Shannon	1868	Gaiety	1	135

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Continued...

Full-Time Cinemas in the Republic of Ireland, January 2001

Location	County Town	Population	Cinema	Screens	Seats
Limerick	Limerick City	79137	Omniplex	12	1832
Limerick	Limerick City Centre	79137	Savoy (+Central Studio)	6	1200
Limerick	Newcastle-West	3618	Lee	1	190
Longford	Longford Town	6984	Cineplex	4	681
Louth	Drogheda	25282	Omniplex	6	785
Louth	Dundalk	30195	IMC	7	1211
Mayo	Ballina	8762	Savoy	2	257
Mayo	Castlebar	8532	Mayo Movieworld	7	970
Meath	Navan	12810	Diamond	6	935
Monaghan Town	Monaghan Town	5946	Diamond	4	770
Offaly	Tullamore	10039	Omniplex	6	970
Sligo	Sligo Town	18509	Gaiety	7	887
Tipperary	Clonmel	16182	Clonmel Omniplex	5	782
Tipperary	Nenagh	5913	Ormonde	2	270
Tipperary	Thurles	6939	Capitol	3	401
Waterford	Dungarvan	7175	Ormonde	2	279
Waterford	Waterford Town	44155	Cineplex	5	999
Westmeath	Athlone	15544	IMC	6	1078
Westmeath	Mullingar	12492	Ritz	2	308
Wexford	Enniscorthy	7640	Slaney Plaza	3	530
Wexford	Wexford Town	15862	Cineplex	3	622
Wicklow	Arklow	8557	Ormonde	2	260
Wicklow	Bray	27923	Cineplex	7	900
Wicklow	Greystones	11296	Screen by the Sea	1	120
Wicklow	Wicklow Town	7290	Abbey	2	259
		Number of Sites:	65	310	57779

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Appendix VIII

Part-Time Cinemas in the Republic of Ireland, January 2001

Location	County Town	Population	Cinema	Screens	Seats
Cork	Cork City	179954	Triskel Cinematek	1	77
Cork	Fermoy	4469	Fermoy CYC	1	273
Cork	Macroom	2574	Briery Gap	1	200
Donegal	Buncrana	4805	St. Mary's Hall	1	320
		Number of Sites:	4	4	870

Appendix IX

Full-Time Cinemas in Northern Ireland, January 2001

Location	County Town	Population	Cinema	Screens	Seats
Antrim	Antrim	20878	Cineplex, Kennedy Centre	4	788
Antrim	Ballymena	28112	IMC Cinema	7	1253
Antrim	Belfast	279237	Cineplex	5	1007
Antrim	Belfast	279237	Movie House, Yorkgate	14	2574
Antrim	Belfast	279237	Queen's Film Theatre	2	402
Antrim	Belfast	279237	The Strand	4	625
Antrim	Belfast	279237	UGC	10	2501
Antrim	Carrickfergus	35000	Omniplex	6	1032
Antrim	Glengormley	279237	Movie House	6	906
Antrim	Larne	17575	Regal	4	760
Antrim	Lisburn	42110	Omniplex	14	2253
Antrim	Portrush	5598	Playhouse	2	364
Armagh	Armagh	14265	City Film House	4	790
Armagh	Lurgan	21905	ESI Cinemas	4	769
Derry	Coleraine	20721	Jet Centre	4	722
Derry	Derry	72334	Strand Cineplex	7	1375
Derry	Maghera	2876	Movie House	3	433
Down	Banbridge	11448	Iveagh	1	860
Down	Bangor	52437	Cineplex	7	1172
Down	Kilkeel	6024	Vogue	1	295
Down	Newry	21633	Omniplex	9	2100
Down	Newtownards	23869	Movieland	6	989
Fermanagh	Enniskillen	11500	Omniplex	7	1062
Tyrone	Cookstown	9842	Ritz	5	800
Tyrone	Dungannon	48930	Global Cinemas	6	841
Tyrone	Omagh	17280	Studio	6	1050
		Number of Sites:	26	148	27723

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Appendix X

People and Organisations Consulted 1999-2000

Conor Anderson	GFD Communications
Gordon Barry	Chairman, Federation of Irish Film Societies
Paul Brett	Head of Cinema Services, British Film Institute
Helen Carey	Artistic Director, Galway Arts Centre
Sean Cooke	Ballymun Arts and Community Resource Centre
Mary Coll	Director, Belltable Arts Centre, Limerick
Pat Collins	Programme Director, Galway Film Fleadh
Emily Cullen	Arts Officer, The National University, Galway
Liz Culloty	North Leitrim Glens Development Company
Michael Diskin	Director, Town Hall Theatre, Galway
Louise Donlon	Director, Dunamaise Theatre & Centre for the Arts, Portlaoise
Geraldine Dowling	Lansdowne Market Research
Brid Dukes	Director, Civic Theatre, Tallaght
Anne Dunne	Manager, Briery Gap Cultural Centre
Maire Farrell	Director, Linenhall Arts Centre, Castlebar
Brenda Gannon	Director, Federation of Irish Film Societies
Paul Grisewood	Project Manager, New Excel Project, Tipperary
Mick Hannigan	Owner/Manager, Kino Cinema, Cork/Director, Cork Film Festival
Sean Hannigan	Director, Letterkenny Arts Centre
James Harrold	Arts Officer, Galway County Council
Liam Howard	Village Arts Centre, Kilworth, Co. Cork
Ken Ingles	Director, Filmhouse, Edinburgh
Tony Jones	Director, City Screen

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Albert Kelly	Classic Cinema, Harold's Cross, Dublin/ Chairman, Independent Exhibitor's Association
Alan Knowles	Exhibition and Corporate Development Manager, Scottish Screen
Shona McCarthy	Director, Cinemagic
Una McCarthy	Director, Model Arts and Niland Gallery, Sligo
Brendan McCaul	General Manager, Buena Vista (Ireland) International
Niamh McCaul	Director, Clarence Pictures
Somhairle MacConghail	Monaghan County Arts Officer
Jaki McDougall	Director, Glasgow Film Theatre
Bernie McLoughlin	The Nerve Centre, Derry
Bridie McMahon	Galway Film Society
Brendan Maher	Artistic Director, South Tipperary Arts Centre
Liz Meany	Director, Galway Film Centre
Martin Melarkey	Director, The Nerve Centre, Derry
Joe Murphy	Administrator, St John's Arts & Heritage Centre, Listowel
Michael O'Riordan	Phoenix Cinema, Dingle, Co. Kerry
Michael Open	Director, Queen's Film Theatre, Belfast
Maurice Power	Theatre Consultant
Sheila Pratschke	Director, Film Institute of Ireland
Michael Besnard-Scott	Queen's Film Theatre, Belfast
Caroline Senior	Artistic Director, Garter Lane Arts Centre, Waterford
Gary Sheehan	Film and Music Programmer, Triskel Arts Centre, Cork
Sheamus Smith	Film Censor, Film Censor's Office, Dublin
Peter Walsh	Cinemas Manager, Irish Film Centre

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Notes

The Arts Council is committed to developing its understanding of the development needs of the arts by research and dialogue. Research outcomes will be disseminated by various means, including this publishing series, to help develop debate and to promote wider public recognition of the arts.

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