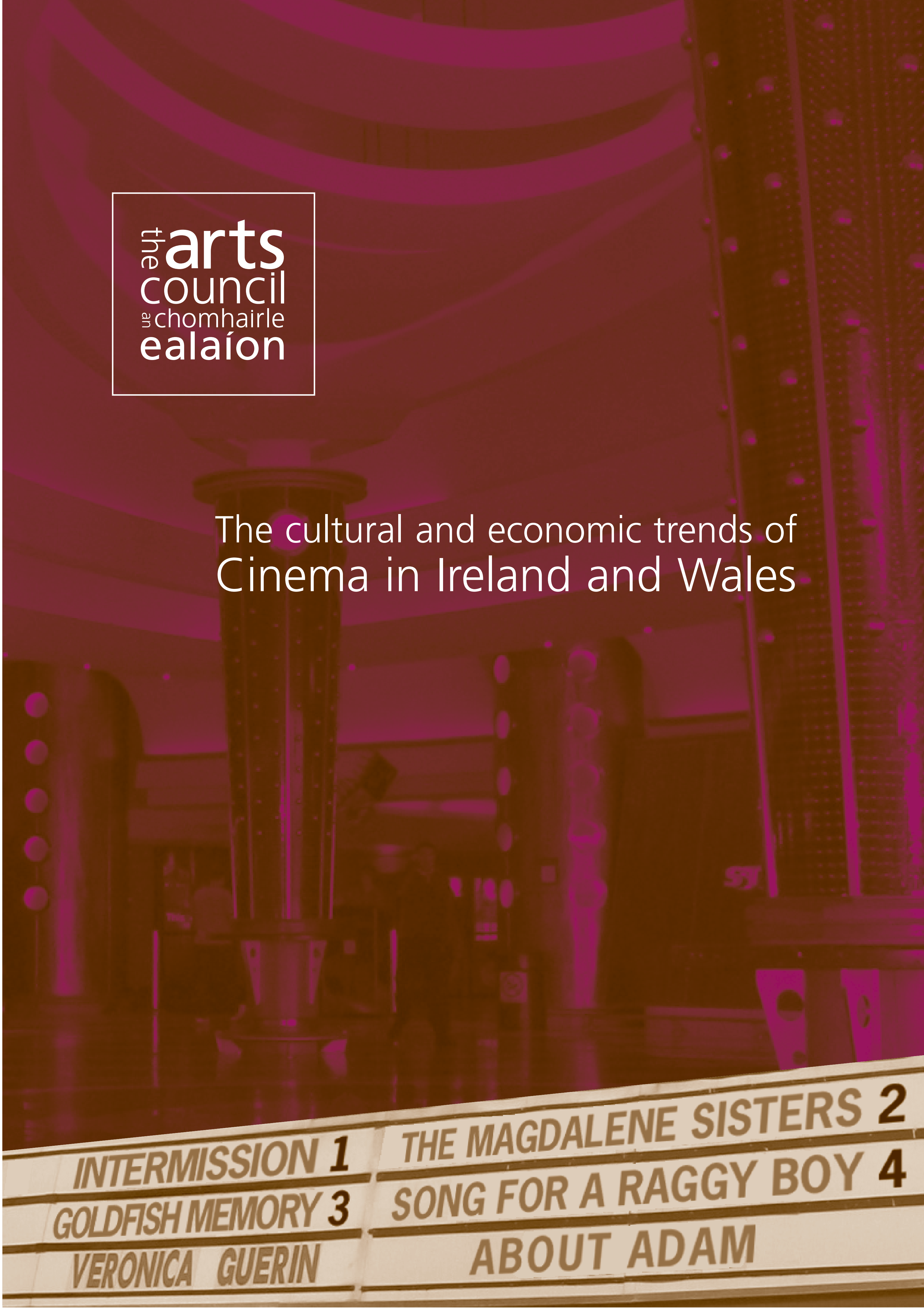

the arts council
an chomhairle ealaíon

The cultural and economic trends of Cinema in Ireland and Wales

Acknowledgements

This audit of cinemas in Ireland and Wales was commissioned by Sgrîn Cymru Wales and the Arts Council. The study was financially supported by the Ireland/Wales Interreg IIIA Community Initiative Programme: ERDF 2000–2006.

Throughout the study we have been fortunate to benefit from the knowledge, enthusiasm and commitment of Rhian Iolo (Exhibition Manager, Sgrîn) and Siobhan Bourke (Film Adviser, Arts Council). Additional invaluable assistance was provided by Stephanie O'Callaghan, Michelle Hoctor, Antoinette O'Neill, and the staff at both Sgrîn and the Arts Council of Ireland.

This study would not have been possible without the generous contribution of time, expertise and information from the many cinema owners, managers, projection and customer services staff we met during the study. Our thanks are also due to the individuals and organisations contacted for comment and information during the research. Our sincere thanks are due to each and every one.

The views expressed in this report are those of the authors. Unless specifically attributed, they do not represent the views of Sgrîn, the Arts Council, nor those of any persons or organisations who have been consulted in the course of the study.

J Ron Inglis & Sue Todd
April 2004

Inglis Todd Consultants is an independent arts and media consultancy operating throughout the UK and Ireland. J Ron Inglis and Sue Todd - are among the UK's leading consultants in arts and media development, especially in cinema exhibition. They have worked with a wide range of cinemas, exhibitors and funding and policy organisations across the UK and Ireland. Their work includes organisational and business development with cinemas, festival and exhibition research, feasibility and capital development as well as market analysis and strategic planning. Their clients have included the UK Film Council, British Film Institute, The Arts Council (Ireland), Sgrîn Cymru Wales, and Scottish Screen as well as many local authorities and cinema and media organisations.

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Preface

The strength of Ireland's film culture is highly related to the health of its cinema exhibition sector. Currently in Ireland, the value of cinema as an important and legitimate cultural activity is evidenced by the high levels of cinema attendance, by the popularity of locally produced Irish films and by success of film festivals in engaging audiences with European and world cinema and critical debate.

This report, which was commissioned in partnership with Sgrîn Cymru Wales, and with support from Interreg III, provides a comprehensive analysis of the cultural and economic impact of cinema in both Ireland and Wales and gives a detailed insight into current cinema provision in Ireland.

It presents a set of views and analysis of the cinema sector which enlightens and provides a necessary starting point for the Arts Council and other key stakeholders in terms of setting out the opportunities and challenges facing the cinema sector, in particular the cultural cinema sector. By contextualising current provision, it offers a coherent picture of the current programmatic, operational and spatial strengths as well as weaknesses.

While the report suggests a healthy and vibrant culture of cinema going, it is important, if cinema audiences are to have high quality experience, that key steps and initiatives are taken to create and sustain a developed and literate cinema and film audience. The report's key recommendation to create a Irish Cinema Exhibition taskforce is welcome as it will allow the cinema exhibition sector to develop and meet the challenges ahead.

The Arts Council wishes to acknowledge with thanks the work of J Ron Inglis and Sue Todd, and the many people who contributed to their research, in producing this report.

Olive Braiden
Chair

Brollach

Bíonn rath an chultúir scannán in Éirinn ag brath go mór ar rath a bheith ar an earnáil taispeána cineama. In Éirinn san am i láthair, bíonn lucht féachana mór ag tarraingt ar na pictiúrlanna, bíonn éileamh ar scannáin a dhéantar anseo in Éirinn agus bíonn rath ar fhéilte scannán a chuireann scannáin Eorpacha agus domhanda i láthair an lucht féachana agus a spreagann díospóireacht chriticiúil. Deimhníonn na rudaí seo luach an chineama mar ghníomhaíocht chultúrtha atá tábhachtach, dlisteanach.

Sa tuarascáil seo, a coimisiúnaíodh i gcomhpháirt le Sgrîn Cymru Wales, agus a fuair tacaíocht ó Interreg III, gheofar anailís chuimsitheach ar thionchar cultúrtha agus eacnamaíoch an chineama in Éirinn agus sa Bhreatain Bheag, agus mionléargas ar an soláthar cineama in Éirinn faoi láthair.

Cuirtear tuairimí agus anailís ar fáil i dtaobh earnáil an chineama. Is foinse eolais agus pointe tosaigh é seo a chabhróidh leis an gComhairle Ealaíon agus le páirtithe leasmhara eile na deiseanna agus na dúshláin a bhaineann le hearnáil an chineama a áireamh, go háirithe iad siúd a bhaineann le hearnáil an chineama chultúrtha. Toisc go gcuireann sí an soláthar reatha i gcomhthéacs, tugann sí léargas comhleanúnach ar na láidreachtaí agus na laigí atá ann faoi láthair ó thaobh clárú, cúrsaí oibriúcháin agus spáis.

Cé go dtugann an tuarascáil seo le fios go bhfuil cultúr cineama folláin fuinniúil ann, tá sé tábhachtach, más mian linn go mbainfeadh an lucht féachana lántairbhe as, go ndéanfar bearta agus tionscnaimh lárnacha áirithe chun lucht féachana cineama atá géarchúiseach, eolach a chruthú agus a chothú. Fáiltímid roimh cheann de na moltaí lárnacha atá sa tuarascáil, go mbunófaí tascfhórsa um Thaispeáint Cineama in Éirinn, rud a chabhróidh leis an earnáil taispeána cineama forbairt agus dul i ngleic leis na dúshláin atá roimpi.

Admhaíonn an Chomhairle Ealaíon an obair atá déanta ag J Ron Inglis agus Sue Todd, agus ag go leor daoine eile a chabhraigh lena gcuid taighde, le linn don tuarascáil seo a bheith á hullmhú. Gabhaimid buíochas leo go léir.

Olive Braiden
Cathaoirleach

Executive Summary

This study was commissioned by Sgrîn Cymry Wales and the Arts Council. It provides a detailed cinema audit in the Republic of Ireland and Wales, concentrating on designated EU Interreg IIIA zones. It is intended to inform cinema exhibition policy and decision making for both Sgrîn and the Arts Council.

The report is in four sections:
i) Research aims and contextual data
ii) Audit and field study results
iii) Key issues identified during the research
iv) Summary and recommendations

i) CONTEXT

There are 64 cinema sites in Ireland and 57 in Wales accounting for a total of 328 and 173 screens respectively. This equates to 8.4 screens per 100,000 population in Ireland and 6.0 per 100,000 population in Wales. Cinema admissions in Ireland and Wales for 2002 totalled 17.3 million and 7.1 million respectively. The annual frequency of cinemagoing per capita in Ireland is the second highest in Europe (4.5 visits per year in 2002). Admission figures are not available for Wales separately from the UK, but the evidence of this study is that the rate is likely to be slightly below the UK national rate of 3.0 visits per year (2002).

ii) AUDIT AND FIELD STUDY RESULTS

There has been a rapid and substantial growth in the number of cinema sites in Ireland (+45% built in the past ten years), accompanied by a doubling of the cinema audience. In Wales there has been a smaller addition to the cinema stock but the number of cinema venues in rural areas continues to be substantial (31% in towns with less than 5,000 population).

Overall, the Irish cinema sector is predominantly controlled by the private sector whereas the Welsh cinema sector has a more diverse organisational structure.

There is a higher proportion of multiplex and multi-screen cinemas in Ireland than Wales - 25 multiplexes, compared to 11 respectively. In Wales there are a high number of public cinemas based within arts centres or theatres. These account for 30 sites with a cumulative total of 35 screens and 10,418 seats. In Ireland, there are only two such sites, accounting for six screens and only 1,130 seats (excluding the film societies and the Irish 'access CINEMA' network).

Location

There is a relatively even distribution of cinemas across Ireland, although there are important differences in terms of cinema types. There is a comparatively broad spread of multiplex cinemas, with a very strong concentration of multiplex sites in and around Dublin. Multiplex gaps are largely populated by two-four screen cinema sites and in a few instances five-eight screen sites.

The distribution of cinema sites in Wales is less even. Multiplex provision is lower overall and is concentrated heavily in the south east and around Cardiff with just two sites on the north Wales coast at Llandudno Junction and Rhyl plus another in Wrexham. The density of cinema provision in the large band between these north and south bands, throughout mid Wales, is low.

Cinemas in both Dublin city and the greater Cardiff area account for one-third of all screens in Ireland and Wales respectively. Over half of all cinema admissions in Ireland come from cinemas in Dublin city.

Site and building

Recently built multiplexes dominate the cinema sectors in both countries. The five largest cinemas (by seating capacity) in Ireland and Wales account for almost one quarter of all cinema seats in Ireland and over one third of all cinema seats in Wales.

Employment

On the basis of the actual staffing data provided during this study and typical staffing levels, it is estimated that approximately 1,500 people work in the cinema sectors in each country. Approximately one-third of these people work full-time in cinemas. One in four individuals working in cinemas in Wales is a volunteer.

Programme style

The majority of Irish cinemas have a predominantly commercial programming style showing new titles on date of release, whereas in Wales there is more variety in programming style. This reflects the nature of the cinema sector in both countries – major and minor commercial circuits predominating in Ireland, while Wales has a more mixed cinema ecology.

Distribution

Film distribution in the UK and the Republic of Ireland is dominated by six major companies who, in 2002, between them account for 90% of the market measured by gross box office takings. The two most contentious issues between cinema exhibitors and film distributors highlighted in the research are the availability of prints at the time of the release, and the rental terms on which the film is made available.

Extending the programme

The key areas for this research relate to quality and quantity of programming and broadening programme choice. This study highlights a low proportion of cultural or specialised programming, particularly in Ireland where approximately one in ten cinemas screened specialist films – and this may only be on an occasional basis. In Wales the proportion is higher, particularly among the arts centre and theatre sites. Of the 57 cinemas in Wales, 15 indicated they included specialised or cultural films within the programme. A high proportion of these are arts centre/theatre venues and points to the importance of this grouping to the cinema sector in Wales.

Film societies

An important part of the cinema sector within both countries consists of film societies and film clubs. Film societies provide access to foreign language and specialised product where this is not otherwise available. In Ireland this sector is coordinated through the 'access CINEMA' network, part funded by the Arts Council. In Wales the British Federation of Film Societies (Welsh Group), a voluntary national body partly funded by Sgrîn, represents the interests of film societies.

Festivals

Film festivals, in both Ireland and Wales, play a key role in expanding and extending the diversity of programme choice available to audiences and in widening the debate about film culture. The network and reach of festivals is more extensive in Ireland than in Wales at present and includes a broader range of venues.

Irish and Welsh films

There is a clear enthusiasm for Welsh or Irish films when films are on national release and therefore supported by distributor print and advertising funds. There is also enthusiasm for Welsh language films when they are available, although a number of interviewees commented on the lack of Welsh language product. Short films identified as Welsh or Irish were generally well received by cinemas in both countries.

Education and programme enhancement

Outside the Irish Film Institute and festivals, only a limited amount of film education work takes place in Ireland. A number of venues in both Ireland and Wales expressed an interest in and market for developing education work but are restricted by lack of funding and resources such as specialist staff and education/teaching space. In Wales, the majority of education work occurs at the arts centre venues and is generally dependent on project funding.

iii) KEY ISSUES IDENTIFIED DURING THE RESEARCH

Gaps in provision

Ireland has a relatively well developed, recently built, cinema sector but a poorly developed cultural cinema network, (although additional cultural cinema provision is provided by film societies and film festivals).
There is a relatively even spread of cinema exhibition provision across Ireland, although there is a considerable concentration of cinemas in the greater Dublin area. Provision is more sparse in the north-west from Galway upwards. Outside the main population areas, cinemas tend to be traditional multi screen or single screen sites. In some areas, drive-times to cinemas are lengthy.

Executive Summary

There is a significant imbalance in cinema provision across Wales. Modern commercial cinemas are concentrated along the northern and especially the southern belts or coastal regions. There are a few predominantly traditional or older cinemas along the Welsh/English border to the east. Most notable, however, is the sparse provision across the whole of mid-Wales.

The not-for-profit sector, including arts centres, is a key part of the cinema infrastructure in Wales that brings a wider range of provision to audiences.

In both Ireland and Wales, the importance of traditional cinema sites in smaller towns and rural areas in bringing a cinema programme to local audiences and maintaining a key local amenity cannot be underestimated. Many of these sites are maintained sometimes against all odds through the dedication, ingenuity and commitment of cinema owners and managers. Without these cinemas, audiences in smaller towns and rural areas would have no access to cinema and would be deprived of key local amenities.

Cultural provision

Given the uneven distribution of cinemas within Wales, access to cultural cinema provision is comparatively good. This is largely due to the spread of arts centres and multipurpose sites offering specialist and cultural programmes.

In contrast, the physical infrastructure for cultural cinema in Ireland is currently weak. At present the only dedicated cultural cinemas in Ireland are the Irish Film Institute in Dublin and the Kino in Cork. The importance of arts centres and the overlap with the film society/'access CINEMA' networks, in expanding cultural provision, is evident.

Recognising the lack of cultural cinemas in Ireland, the Arts Council and the Irish Film Board have responded by establishing a significant fund – through the Cultural Cinema Consortium – which aims to assist the development of new two-three screen arthouse cinemas and to improve current arthouse cinemas. No similar fund exists in Wales although cultural cinemas can apply for capital funding from the National Lottery via the UK Film Council's various exhibition development schemes.

Additional elements in the provision of cinema and particularly cultural cinema are the two mobile cinemas in Ireland and the film festivals in both countries. The extensive touring of the Cinemobile clearly illustrates the considerable number of communities who have benefited from this service.

Accessibility

The research audit and site visits show that many cinemas, particularly in Wales because of UK legislation, have been adapted or are being upgraded with appropriate facilities. But there are still a large number of cinemas where access is poor; many (though not all) of these tend to be traditional cinema sites built before 1975.

Despite the provision of best practice guidelines by the Cinema Exhibitors Association, the level of knowledge and information exchange on disability access requirements is comparatively poor and facilities for disabled users could be improved.

Cinemas of all types that have provided facilities for new users are engaging with new audiences and are noticing a more active use by senior citizens groups, day cate centres and others.

Digital cinema

This study takes place at a time of considerable uncertainty surrounding the technologies to be used in cinemas in the near future. Since the late 1990s, the potential of high definition digital video projection to replace the 35mm film format has been tested extensively. Despite the slow and erratic adoption of the new technologies, the cinema industry in general expects that digital cinema will increasingly play an important role in the coming years.

The roll-out of D-cinema in the UK and Ireland – assisted largely by the UK Film Council and European DocuZone – and E-cinema – especially through Carlton Screen Advertising's efforts – will result in much greater attention on these new cinema technologies during 2004-05. A range of opportunities for cinema exhibitors in Ireland and Wales to become involved with these systems already exists.

The D-cinema and E-cinema installations to date have been concentrated in major international cities and in high profile, usually commercial, cinemas. However, many of the benefits available from digital cinema technologies are potentially more relevant to smaller, non-metropolitan cinemas.

Impact

Cinema can play an important role within regeneration and cultural development strategies. Both the Irish and Welsh spatial strategies point to policies and issues where the cinema sector should have a role. It is clear that both spatial strategies are key documents in the future national development of both Wales and Ireland and provide the potential for key linkages with any future cinema exhibition development strategy.

The key role cultural facilities, and specifically cinema, can play within national spatial development is something which arguably should have greater prominence. However, for this to occur, there is a need for greater advocacy for the important role cinema can play in local communities.

Vulnerabilities

This audit of cinemas in Ireland and Wales has identified strengths in the two sectors but has also pointed to vulnerabilities which if left unattended may result in a decline in cinema provision. Weak points include the uneven availability of specialist programming; the shortage of film education activities; the fragility of technical support services in some areas; a lack of engagement with local and national government; lack of funds to invest in non-metropolitan cinemas; and an absence of a clear digital cinema strategy.

iv) RECOMMENDATIONS

This audit and research study was commissioned to provide a foundation for Sgrîn and the Arts Council to develop their future exhibition strategies, to strengthen and expand the sector in both countries and to broaden and enhance programme choice for audiences.
It is our view that to be successful, such strategies need to be developed with and influenced by a range of strategic partners. This will establish a wide platform of engagement, seek to achieve shared ownership and enable Sgrîn and the Arts Council of Ireland to engage with key players linked to cultural, industrial and local regeneration policies.

Task force

Recommendation A

It is recommended that a high level Cinema Task Group be established in both Ireland and Wales to review and take forward the findings and recommendations from this report.

Cinema location and spatial strategies

Recommendation B

It is recommended that cinema exhibition strategies in Ireland and Wales explicitly build on the relevant spatial strategies and town planning policies in order to ensure that the value and role of local cinemas can be demonstrated and discussed within local, regional and national government.

Local government partnership

Recommendation C

There is a need to encourage greater dialogue between local authorities and cinemas in both Ireland and Wales. It is recommended that this should be brokered by the Arts Council through their existing networks, and by Sgrîn in Wales (working in partnership with the Arts Council of Wales where appropriate) and linked to the Cinema Task Force work.

Executive Summary

Cinema buildings

Recommendation D

It is recommended that a series of measures is adopted with the specific aim of encouraging high quality design and architecture for new and redeveloped cinemas. These measures may include conferences or seminars; awards for cinema design; and production of specialist publications.

Access issues

Recommendation E

It is recommended that the Welsh and Irish Cinema Task Forces promote "best practice" work around improving accessibility to cinemas. The Task Forces should work with local authorities to assist local cinemas which require modifications to meet access legislation in order to ensure that these valued local amenities remain operational.

Programme development

Recommendation F

i) Ireland – It is strongly recommended that the Cultural Cinema Consortium capital fund in Ireland should be maintained for the foreseeable future. Key centres identified in the Developing Cultural Cinema in Ireland research document should continue to be developed.

ii) Wales – It is recommended that the Welsh Task Force and Sgrîn consider the merits of establishing a Welsh capital fund – which secures new resources for cinemas in Wales. This should be additional to existing funding and should be seen to enhance and complement existing support.

Recommendation G – Ireland

It is recommended that funding for arts centres, film societies and mobile cinemas, particularly centralised service provision through organisations such as 'access CINEMA', should be maintained and, where appropriate, expanded.

Recommendation H – Ireland and Wales

It is also recommended that additional measures to expand programme choice should be investigated including the provision of funding to develop programme packages, tours and joint marketing.

Film education

Recommendation I – Ireland and Wales

It is recommended that provision for film and media education in both Ireland and Wales should be expanded. An education round table or working group should be established (separately in each country) tasked with reviewing this area and developing practical proposals for expansion.

Staff development

Recommendation J

i) It is recommended that the major circuits are encouraged to work with the independent sector (commercial and non-profit) to provide high quality training for new recruits to the cinema sector.

ii) It is recommended that the national bodies – including SkillSet Cymru, Screen Training Ireland and the Independent Cinema Office – develop training courses and other schemes such as seminars or workshops specifically for the independent cinema sectors.

iii) It is recommended that an annual residential conference for the cinema sector be organised in order to allow current issues to be debated and to allow training workshops to be provided. In Ireland and Wales, and possibly extended to include Northern Ireland and Scotland where cinemas experience similar issues.

Film distribution

Recommendation k

i) It is recommended that national cinema organisations (including the Society of Film Distributors, Cinema Exhibitors Association, UK Film Council) be encouraged to facilitate a dialogue between distributors and cinema exhibitors in order to re-examine distribution practices with the aim of creating new, productive opportunities for cinemas in small town and rural areas.

ii) It is recommended that the opportunity to re-define the distributor-(censor)-exhibitor relationship for digital releases should constitute one of the key tasks undertaken by the Task Force.

Information and monitoring

Recommendation L

It is recommended that the Irish and Welsh Task Forces give consideration to producing an annual digest of information about the cinema sectors in Wales and Ireland – from multiplex through to film societies, mobile cinema and film festivals.

Digital cinemas

Recommendation M

i) It is recommended that the Cultural Cinema Consortium in Ireland give guidance and provide funding, perhaps in collaboration with other organisations such as the UK Film Council, for digital cinema equipment to be installed in cinemas, including arts centres, wishing to develop their programme and take advantage of the flexibility and new opportunities available with these technologies.

ii) It is recommended that Sgrîn similarly endeavour to ensure that a reasonable proportion of cinemas in Wales benefit from the Digital Screen Network and the Digital Fund for Non-Theatrical Exhibition operated by the UK Film Council.

iii) More broadly, it is recommended that the national bodies work to ensure that film distributors and cinema exhibitors collaborate to develop appropriate new programming and booking models which allow the benefits of digital technology – flexibility of scheduling, ability to retain a print for as long as the cinema wants, new avenues of programming – to be delivered to audiences.

iv) It is recommended that a seminar or workshop for cinema owners, programmers, distributors, critics and marketing departments be organised to explore the new programming opportunities offered by digital cinema and hurdles to achieving success with non-traditional approaches to programming cinemas. The aim of these events would be to revisit the traditional, multiplex dominated, paradigm of cinema programming.

Achoimre Feidhmiúcháin

Sgrîn Cymru Wales agus an Chomhairle Ealaíon a choimisiúnaigh an staidéar seo. Cuireann sé iniúchadh mionsonraithe ar an scannánaíocht i bPoblacht na hÉireann agus sa Bhreatain Bheag ar fáil, ag díriú ar chriosanna ainmnithe Interreg de chuid an AE. Tá sé mar aidhm aige eolas a chur ar fáil le haghaidh polasaí agus beartaíochta i leith thaispeánadh scannán i gcás Sgrîn agus na Comhairle Ealaíon araon.

Ceithre rannóg atá sa tuarascáil:
- i) Aidhmeanna taighde agus sonraí comhthéacsacha
- ii) Torthaí ar iniúchadh agus ar staidéar allamuigh
- iii) Na príomhcheisteanna a aithníodh i gcaitheamh an taighde
- iv) Achoimre agus moltaí

I) COMHTHÉACS

Tá 64 suíomh pictiúrlainne in Éirinn agus 57 sa Bhreatain Bheag; is ionann sin agus 328 agus 173 scáileán faoi seach san iomlán. Is ionann sin arís agus 8.4 scáileán in aghaidh 100,00 de dhaonra na hÉireann agus 6.0 in aghaidh an lín chéanna sa Bhreatain Bheag. San iomlán ligeadh isteach 17.3 milliún i bpictiúrlanna na hÉireann agus 7.1 milliún sa Bhreatain Bheag i gcaitheamh na bliana 2002. Tá an dara minicíocht is airde san Eorpa ag Éirinn maidir le cuairt per capita a thabhairt ar phictiúrlann in aghaidh na bliana (4.5 cuairt in aghaidh na bliana sa bhliain 2002). Níl figiúirí cuairte ar leith ar fáil ón mBreatain Bheag, neamhspleách ar an Ríocht Aontaithe, ach ón staidéar seo is léir go bhfuil siad beagáinín níos lú ná an ráta náisiúnta sa RA, is é sin 3.0 cuairt in aghaidh na bliana (2002)

II) TORTHAÍ AR INIÚCHADH AGUS AR STAIDÉAR ALLAMUIGH

Tháinig fás sciobtha substaintiúil ar líon na suíomh pictiúrlainne in Éirinn (+45% a tógadh le deich mbliana anuas), agus méadaíodh faoi dhó ar an lucht féachana. Bhí méadú níos lú sa Bhreatain Bheag ar an stoc pictiúrlann ach is substaintiúil i gcónaí é líon na bpictiúrlann i gceantair faoin tuath (31% i mbailte a bhfuil níos lú ná 5,000 de dhaonra iontu).

Tríd is tríd, is leis an earnáil phríobháideach í earnáil na bpictiúrlann in Éirinn ach tá níos mó éagsúlachta sa struchtúr eagraíochtra a bhaineann leis an earnáil sin sa Bhreatain Bheag. Tá líon níos mó pictiúrlann ilphléacsach _ agus ilscáileán in Éirinn ná mar atá sa Bhreatain Bheag – 25 pictiúrlann ilphléacsach i gcomparáid le 11 faoi seach. Tá líon mór pictiúrlann phoiblí sa Bhreatain Bheag atá lonnaithe laistigh d'ionaid ealaíon nó d'amharclanna. Is ionann iad sin agus 30 suíomh ag a bhfuil 35 scáileán agus 10,418 suíochán san iomlán. Níl ach dhá shuíomh mar iad in Éirinn, gan ach 6 scáileán ar fad agus 1,130 suíochán (lasmuigh de chumainn scannán agus an líonra 'access CINEMA).

Suíomh

Tá dáileadh na bpictiúrlann cothrom go leor ar fud na hÉireann, cé go bhfuil difríochtaí tábhachtacha ann ó thaobh na saghsanna pictiúrlainne de.Tá leathadh cuibheasach leathan ann de phictiúrlanna ilphléacsacha, agus tá comhchruinniú an-láidir de shuímh ilphléacsacha i mBaile Átha Cliath agus máguaird. Suímh phictiúrlainne 2-4 scáileán nó i gcásanna áirithe 5-8 scáileán is mó a líonann na bearnaí ilphléacsacha.

Is lú ná sin fós é dáileadh na suíomh pictiúrlainne sa Bhreatain Bheag. Is ísle tríd is tríd é an soláthar ilphléacsach agus é comhchruinnithe sa chuid is mó sa taobh thoir theas agus timpeall ar Caerdydd gan ach dhá shuíomh ar chósta thuaidh na Breataine Bige i nGabhal Llandudno agus Rhyl agus ceann eile in Wrexham. Is íseal é soláthar na bpictiúrlann sa bhanda leathan sin idir an banda theas agus an banda thuaidh ar fud lár na Breataine Bige.

Is ionann líon na bpictiúrlann i gcathair Átha Cliath agus i mórcheantar Caerdydd agus trian de na scáileáin go léir in Éirinn agus sa Bhreatain Bheag faoi seach. Breis aguis leath de na cuairteanna ar phictiúrlanna in Éirinn is ar phictiúrlanna chathair Átha Cliath iad.

Suíomh agus Foirgneamh

Is iad na pictiúrlanna ilphléacsacha a tógadh le déanaí atá chun tosaigh in earnáil na bpictiúrlann sa dá thír. Is ionann an cúig phictiúrlann is mó (de réir líon na suíochán) in Éirinn agus sa Bhreatain Bheag agus an ceathrú cuid, nach mór, de shuíocháin uile na hÉireann agus breis agus trian de shuíocháin na Breataine Bige.

Is é a thuigeann an tuarascáil seo le 'pictiúrlann ilphléacsach', agus í ag teacht le heagraíochtaí taighde ar nós Dodona Research, ná pictiúrlann shaintógtha ina bhfuil cúig scáileán nó níos mó agus a tógadh i ndiaidh 1984. Níl seanphictiúrlanna a tiontaíodh ina suímh ilscáileán san áireamh.

Fostaíocht

Ar bhonn na sonraí a bhaineann le soláthar foirne agus a cuireadh ar fáil le linn an staidéir seo agus ar bhonn sonraí tipiciúla, meastar go bhfuil 1,500 duine ag obair sna hearnálacha pictiúrlainne sa dá thír. Tá thart ar an tríú cuid de na daoine sin ag obair go lánaimseartha i bpictiúrlanna. Is ar bhonn deonach a oibríonn duine as ceathrar i bpictiúrlanna sa Bhreatain Bheag.

Stíl na gClár

Formhór na bpictiúrlann in Éirinn is stíl tráchtála í stíl na gclár den chuid is mó; taispeántar teidil nua ar dháta a n-eisiúna. Tá níos mó éagsúlachta i gcláir na Breataine Bige. Is léiriú é sin ar nádúr na hearnála sa dá thír – tá mórchiorcaid agus mionchiorcaid tráchtála chun tosaigh in Éirinn agus tá éiceolaíocht scannán níos measctha sa Bhreatain Bheag.

Dáileadh

Sé mhórchomhlacht atá chun tosaigh i ndáileadh scannán sa Ríocht Aontaithe agus i bPoblacht na hÉireann. Eatarthu, sa bhliain 2002, bhí siad freagrach as 90% den mhargadh, á mheas ar fháltas comhlán oifigí na dticéad. Is iad an dá cheist is conspóidí idir lucht taispeána na scannán agus lucht a ndáilte a bhfuil béim orthu sa taighde seo ná fáil a bheith ar na priontaí tráth a n-eisiúna agus na téarmaí cíosa trína gcuirtear an scannán ar fáil.

An clár a leathnú

Ceann de na príomhréimsí sa staidéar seo is ea cáilíocht agus cainníocht na gclár agus rogha clár a leathnú. Aibhsíonn an staidéar seo comhréir íseal de chláir chultúrtha nó de shainchláir, go háirithe in Éirinn nuair nach bhfuil ach pictiúrlann as deich gcinn a thaispeánann scannáin speisialaithe – agus an méid sin féin ar bhonn ócáideach. Tá an chomhréir níos airde sa Bhreatain Bheag, go háirithe i measc na suíomh sin atá ceangailte le hionaid ealaíon nó le hamharclanna. As 57 pictiúrlann sa Bhreatain Bheag, léirigh 15 go raibh scannáin speisialaithe nó chultúrtha mar chuid den chlár acu. Is céatadán ard iad na suímh ionaid ealaíon/amharclainne agus is léiriú é ar thábhacht na ngrúpaí sin i gcomhthéacs earnáil na scannán sa Bhreatain Bheag.

Cumainn scannán

Cuid thábhachtach d'earnáil na scannán sa dá thír is ea cumainn scannán agus clubanna scannán. Cuireann cumainn scannán fáil ar tháirgí i dteangacha iasachta nó ar shaintáirgí nach mbeadh fáil orthu sa ghnáthshlí. In Éirinn déantar comhordú air seo tríd an líonra 'access CINEMA' atá páirtmhaoinithe ag an gComhairle Ealaíon. Is é an British Federation of Film Socities (Grúpa na Breataine Bige), comhlacht náisiúnta deonach, páirtmhaoinithe ag Sgrîn, a fhéachann i ndiaidh leas na gcumann scannán.

Féilte

Bíonn ról lárnach ag féilte scannán, in Éirinn agus sa Bhreatain Bheag araon, chun éagsúlacht rogha na gclár a chuirtear ar fáil don lucht féachana a mhéadú agus a leathnú agus chun an díospóireacht faoi chultúr na scannán a scaipeadh chomh maith. Is leithne é líonra na bhféilte in Éirinn ná sa Bhreatain Bheag faoi láthair agus réimse suíomh níos leithne ann freisin.

Scannáin na hÉireann agus na Breataine Bige

Cuireann daoine an-spéis i scannáin na Breataine Bige agus na hÉireann nuair a bhíonn fáil orthu ar bhonn náisiúnta agus, dá réir sin, tacaíocht á fáil acu trí phrionta an dáileora agus trí chistí fógraíochta. Cuirtear an-spéis chomh maith i scannáin Bhreatnaise ach iad a bheith ar fáil, cé go raibh roinnt agallaithe ag gearán nach raibh dóthain táirgí Breatnaise ann. Cuireadh fáilte tríd is tríd roimh ghearrscannáin ó Éirinn agus ón mBreatain Bheag.

Achoimre Feidhmiúcháin

Oideachas agus clárfheabhsú
Lasmuigh de na féilte sin agus obair an Irish Film Institute is beag oideachas scannánaíochta a bhíonn ar siúl in Éirinn. Bhí roinnt suíomh in Éirinn agus sa Bhreatain Bheag araon a raibh spéis acu sa réimse oideachais a fhorbairt, agus margadh ann dó, dar leo, ach tá easpa maoinithe agus acmhainní ina bhac orthu, gan trácht ar shainfhoireann agus spás teagaisc/foghlama. Sa Bhreatain Bheag, tarlaíonn an chuid is mó den obair oideachais sna hionaid ealaíon agus an obair sin ag brath i gcoitinne ar mhaoiniú tionscadail.

III) PRÍOMHCHEISTEANNA A AITHNÍODH I GCAITHEAMH AN TAIGHDE

Bearnaí sa soláthar
Tá an earnáil scannán réasúnta forbartha in Éirinn, earnáil a tógadh le déanaí, ach tá an líonra scannán cultúrtha tearcfhorbartha (bíodh is go gcuireann cumainn scannán agus féilte scannán soláthar breise de scannáin chultúrtha ar fáil).

Tá scaipeadh na bpictiúrlann cothrom go leor ar fud na hÉireann cé go bhfuil comhchruinniú suntasach de phictiúrlanna i mórcheantar Átha Cliath. Éiríonn an soláthar gann sa taobh Thiar Thuaidh, ó Ghaillimh suas. Lasmuigh de na ceantair a bhfuil daonra mór iontu, is gnách gur pictiúrlann ilscáileán nó aonscáileán a fhaightear. In áiteanna áirithe tógann sé tamall maith ar dhaoine tiomáint go dtí an phictiúrlann.

Is suntasach an mhíchothromaíocht a bhaineann le soláthar pictiúrlann sa Bhreatain Bheag. Faightear comhchruinniú de phictiúrlanna tráchtála ar feadh na gcriosanna thuaidh agus go háirithe ar feadh na gcriosanna theas, nó sna réigiúin cois cósta. Tá roinnt pictiúrlann ar seanphictiúrlanna traidisiúnta iad ar an teorainn idir an Bhreatain Bheag agus Sasana san Oirthear. Is díol suntais é, áfach, a laghad pictiúrlann a fhaightear i lár na tíre ar fad.

Cuid lárnach d'infrastruchtúr na bpictiúrlann sa Bhreatain Bheag is ea an earnáil neamhbhrabúsach, na hionaid ealaíon san áireamh, a chuireann soláthar níos leithne ar fáil don lucht féachana.

Baineann tábhacht nach beag le suíomh na bpictiúrlann traidisiúnta, in Éirinn agus sa Bhreatain Bheag, i mbailte beaga agus i gceantair faoin tuath: cuireann siad clár scannán ar fáil do lucht féachana áitiúil agus cothaíonn siad saoráid lárnach sa cheantar. Déantar na suímh seo a chothabháil go minic ar bhonn míorúilteach, trí dhíograis, trí stuaim agus trí thiomantacht na n-úinéirí agus na mbainisteoirí. Murach na pictiúrlanna sin, bheadh an lucht féachana sna bailte beaga agus sna ceantair faoin tuath gan aon phictiúrlann acu agus iad gearrtha amach ó shaoráidí lárnacha áitiúla.

Soláthar cultúrtha
Ag cur dáileadh míchothrom na bpictiúrlann sa Bhreatain Bheag san áireamh, tá teacht cuibheasach maith ag daoine ar sholáthar scannán cultúrtha. An chúis is mó atá leis sin ná ionaid ealaíon agus suímh ilaidhmeanna a bheith dulta i méid agus a chuireann sainchláir agus cláir chultúrtha ar fáil.

I gcodarsnacht leis sin, is lag é an t-infrastruchtúr le haghaidh scannán cultúrtha in Éirinn faoi láthair. I láthair na huaire níl ach dhá phictiúrlann shaintiomanta in Éirinn agus sin iad an Irish Film Institute i mBaile Átha Cliath agus an Kino i gCorcaigh. Is léir go bhfuil tábhacht le hionaid ealaíon agus forluí leis na líonraí chumainn scannán/ 'access CINEMA' chun soláthar cultúrtha a mhéadú.

D'aithin an Chomhairle Ealaíon agus Bord Scannán na hÉireann go rabhamar gann ar phictiúrlanna cultúrtha agus mar fhreagairt air sin bunaíodh ciste suntasach – an Cultural Cinema Consortium/ Cuibhreannas Pictiúrlann Cultúrtha – a thugann faoi chúnamh a thabhairt chun cabhrú le pictiúrlanna ealaíne 2-3 scáileán a fhorbairt agus chun feabhas a chur ar an soláthar de phictiúrlanna ealaíne atá ann faoi láthair. Níl a mhacasamhail de chiste sa Bhreatain Bheag ach is féidir le pictiúrlanna cultúrtha cur isteach ar mhaoiniú caipitiúil ón gCrannchur Náisiúnta trí scéimeanna éagsúla forbartha Chomhairle Scannán na RA.

Gnéithe breise de sholáthar pictiúrlann, pictiúrlanna cultúrtha ach go háirithe, is ea an dá phictiúrlann soghluaiste in Éirinn agus na féilte scannán sa dá thír. Léiriú suntasach ar an líon mór pobal a bhain leas as an tseirbhís seo is ea an chamcuairt i gcéin is i gcóngar atá déanta ag an Cinemobile.

Rochtain

Léiríonn an t-iniúchadh taighde agus cuairteanna ar na suímh go bhfuil go leor pictiúrlann a bhfuil athchóiriú déanta orthu, go háirithe sa Bhreatain Bheag de bharr reachtaíocht sa RA, nó iad á n-uasghrádú leis na háiseanna cuí. Ach tá go leor pictiúrlann fós ann agus deacrachtaí ag daoine míchumasacha teacht orthu; go leor acu sin (ní hé an t-iomlán acu) is suímh thraidisiúnta iad a tógadh roimh 1975. Ainneoin treoirlínte na gcleachtas is fearr a bheith curtha ar fáil ag an Cinema Exhibitors Association, níl eolas fairsing á mhalartú ar riachtanais rochtana daoine míchumasacha agus b'fhéidir áiseanna na n-úsáideoirí míchumasacha a fheabhsú.

Na pictiúrlanna sin a bhfuil glactha acu le soláthar áiseanna d'úsáideoirí míchumasacha, tá siad ag teacht ar mhargaí nua, ina measc grúpaí seanóirí, ionaid cúraim lae agus mar sin de.

Scannánaíocht digiteach

Tá an staidéar seo á scríobh agus neamhchinnteacht nach beag ag baint leis na teicneolaíochtaí a bheidh in úsáid i bpictiúrlanna sa neastodhchaí. Ó na 1990aidí déanacha ar aghaidh rinneadh tástáil fhorleathan ar an gcumas atá ag teilgean físeán ardghéire chun teacht in áit fhormáid scannán 35mm. Ainneoin go bhfuiltear ag glacadh leis na teicneolaíochtaí nua go mall is go guagach, is dóigh le tionscal na scannán i gcoitinne go mbeidh ról níos tábhachtaí ag an scannánaíocht digiteach sna blianta atá romhainn.

Tá cúnamh ag teacht ó Chomhairle Scannán na RA agus DocuZone na hEorpa – agus E-Cinema – go háirithe trí iarrachtaí Carlton Screen Advertising – rud a chinnteoidh go mbeifear ag díriú níos mó ar na teicneolaíochtaí nua scannánaíochta seo i gcaitheamh 2004-05. Tá réimse deiseanna ann cheana féin do thaispeántóirí scannán in Éirinn agus sa Bhreatain Bheag chun dul i ngleic leis na córais nua seo.

Go dtí seo is sna mórchathracha idirnáisiúnta agus i bpictiúrlanna ardphróifíle, ar bhonn tráchtála de ghnáth, a fhaightear na teicneolaíochtaí nua seo. Mar sin féin d'oirfeadh cuid de na buntáistí a bhaineann leis na teicneolaíochtaí digiteacha níos fearr fós do phictiúrlanna níos lú lasmuigh de na hionaid cheannchathartha.

Éifeacht

Is féidir leis an scannánaíocht ról tábhachtach a bheith aici laistigh de straitéisí forbartha athbheochana agus cultúrtha. Díríonn straitéisí spásúla na hÉireann agus na Breataine Bige araon ar pholasaithe agus ar cheisteanna ar chóir go mbeadh ról ag earnáil na bpictiúrlann iontu. Is léir i gcas straitéisí spásúla na hÉireann agus na Breataine Bige gur doiciméid thábhachtacha is ea iad i dtaca le forbairt náisiúnta amach anseo sa dá thír agus d'fhéadfaidís eochairnaisc a chruthú le pé straitéisí a cheapfar mar gheall ar thaispeánadh scannán.

D'fhéadfaí a áiteamh gur chóir go mbeadh béim níos mó laistigh d'fhorbairt náisiúnta spásúil ar phríomháiseanna cultúrtha, an scannánaíocht san áireamh. Chun go dtarlóidh sé seo, áfach, caithfear cás láidir a dhéanamh maidir leis an ról tábhachtach a d'fhéadfadh a bheith ag an scannánaíocht sna pobail áitiúla.

Laigí

D'aithin an t-iniúchadh seo ar an gcineama in Éirinn agus sa Bhreatain Bheag na buanna a bhaineann leis an dá earnáil ach díríodh ar na laigí iontu chomh maith agus mura leigheasfar iad sin d'fhéadfadh meath a theacht ar an soláthar. I measc na laigí sin bhí: sainchláir a bheith ar fáil ar bhonn míchothrom; easpa imeachtaí oideachais i leith scannán; leochaileacht na seirbhísí tacaíochta teicniúla i réimsí áirithe; easpa teagmhála leis an rialtas áitiúil agus leis an rialtas náisiúnta; easpa cistí chun infheistíocht a dhéanamh i bpictiúrlanna neamh-cheannchathartha; agus straitéis shoiléir mar gheall ar an scannánaíocht digiteach a bheith in easnamh.

Achoimre Feidhmiúcháin

iv) MOLTAÍ

Coimisiúnaíodh an t-iniúchadh agus an staidéar taighde seo chun go mbeadh bonn ag Sgrîn agus ag an gComhairle Ealaíon chun a gcuid straitéisí taispeána a fhorbairt amach anseo, chun an earnáil a neartú agus a leathnú sa dá thír agus chun rogha clár a leathnú agus a mhéadú don lucht féachana. Táimidne den tuairim chun go n-éireodh leis na straitéisí sin gur gá go ndéanfaí iad a fhorbairt i gcomhar le páirtithe straitéiseacha agus faoina n-anáil san. Cuirfidh sé sin ardán leathan teagmhálacha ar fáil inar féidir comhúinéireacht a bhaint amach agus cuirfidh sé ar chumas Sgrîn agus na Comhairle Ealaíon dul i ngleic leis na príomhghníomhairí a bhaineann le polsaithe cultúrtha, tionsclaíochta agus athnuachana áitiúla.

Tascfhórsa

Moladh A

Moltar go gcuirfí Tascfhórsa Pictiúrlann ardleibhéil ar bun in Éirinn agus sa Bhreatain Bheag araon chun athbhreithniú a dhéanamh ar chinneadh agus ar mholtaí na tuarascála seo agus iad a thabhairt ar aghaidh.

Suíomh na bpictiúrlann agus straitéisí spásúla

Moladh B

Moltar go dtógfaí straitéisí taispeána na bpictiúrlann in Éirinn agus sa Bhreatain Bheag go sonrach ar na straitéisí spásúla cuí agus ar pholasaithe pleanála na mbailte chun gur féidir a bheith cinnte go léireofaí agus go bpléifí luach agus ról na bpictiúrlann áitiúil laistigh den rialtas áitiúil, réigiúnach agus náisiúnta.

Comhpháirtíocht leis an rialtas áitiúil

Moladh C

Is gá comhchainteanna a spreagadh idir na húdaráis áitiúla agus na pictiúrlanna in Éirinn agus sa Bhreatain Bheag araon. Moltar go bhfágfaí an cúram sin faoin gComhairle Ealaíon anseo in Éirinn trína bhfuil de líonraí cheana acu agus faoi Sgrîn sa Bhreatain Bheag (agus é ag obair i gcomhar le Comhairle Ealaíon na Breataine Bige más cuí) agus iad nasctha le hobair an Tascfhórsa Scannán.

Foirgnimh na bpictiúrlann

Moladh D

Moltar go nglacfaí le roinnt céimeanna a mbeadh de shainaidhm acu dearadh agus ailtireacht d'ardchaighdeán a spreagadh le haghaidh pictiúrlann idir nua agus athfhorbartha. I measc na gcéimeanna sin d'fhéadfaí a áireamh: comhdhálacha nó semineáir; duaiseanna le haghaidh pictiúrlann a dhearadh; sainfhoilseacháin a chur ar fáil.

Ceisteanna rochtana

Moladh E

Moltar do Thascfhórsa na Breataine Bige agus na hÉireann obair na gcleachtas is fearr a chur chun cinn chun feabhas a chur ar chúrsaí rochtana. Ba chóir do na Tascfhórsaí sin comhoibriú leis na húdaráis áitiúla chun cabhrú le pictiúrlanna áitiúla a bhfuil athruithe de dhíth orthu agus le go mbeidís ag teacht leis an reachtaíocht rochtana agus deimhin a dhéanamh de go leanfaidh na saoráidí luachmhara áitiúla sin dá bhfeidhm.

Clárfhorbairt

Moladh F

i) Éire – moltar gan aon athrú a dhéanamh sa neastodhchaí ar Chiste Caipitiúil Chuibhreannas Cultúrtha na Scannán in Éirinn. Ba chóir go leanfaí den fhorbairt atá á déanamh ar na príomhréimsí a aithníodh sa doiciméad taighde Scannánaíocht Chultúrtha a Fhorbairt in Éirinn.

ii) An Bhreatain Bheag - Moltar do Thascfhórsa na Breataine Bige agus do Sgrîn ciste caipitiúil dá gcuid féin a bhunú – a dheimhneodh acmhainní nua do ph ictiúrlanna na Breataine Bige. Ba chóir go mbeadh sé sin sa bhreis ar an maoiniú reatha agus é ag cur leis agus ag teacht leis an tacaíocht atá ann cheana.

Moladh G – Éire

Moltar go leanfaí den mhaoiniú agus, más cuí, cur leis i gcás na n-ionad ealaíon, na gcumann scannán agus na bpictiúrlann soghluaiste, go háirithe soláthar lárnaithe seirbhísí trí eagraíochtaí ar nós 'access CINEMA'.

Moladh H – Éire agus an Bhreatain Bheag

Moltar chomh maith go bhfiosrófaí céimeanna breise chun rogha clár a mhéadú, ina measc soláthar maoinithe chun clárphacáistí a fhorbairt, camchuairteanna agus cómhargaíocht.

Oideachas scannán

Moladh I – Éire agus an Bhreatain Bheag

Moltar go méadófaí ar an soláthar oideachais scannán agus meán in Éirinn agus sa Bhreatain Bheag araon. Ba chóir cruinniú tobsmaointe nó grúpa oibre a chur ar bun (sa dá thír agus iad neamhspleách ar a chéile) chun athbhreithniú a dhéanamh ar an réimse sin agus moltaí praiticiúla a fhorbairt ar mhaithe le leathnú.

Forbairt foirne

Moladh J

i) Moltar go spreagfaí na mórchiorcaid chun comhoibriú leis an earnáil neamhspleách (ar bhonn tráchtála agus ar bhonn neamhbhrabúsach) chun oiliúint d'ardchaighdeán a chur ar fáil d'earcaigh nua in earnáil na scannán.

ii) Moltar do na comhlachtaí náisiúnta – SkillSet Cymru, Screen Training Ireland agus an Independent Cinema Office – sainchúrsaí oiliúna agus scéimeanna eile a fhorbairt, seimineáir nó ceardlanna cuir i gcás, ar mhaithe leis na hearnálacha scannán neamhspleácha.

iii) Moltar go n-eagrófaí comhdháil bhliantúil chónaithe d'earnáil na scannán chun go mbeifí in ann ceisteanna reatha a phlé agus chun ceardlanna oiliúna a sholáthar. D'fhéadfadh Éire agus an Bhreatain Bheag a leithéid de chomhdháil a eagrú eatarthu agus d'fhéadfaí, b'fhéidir, é a leathnú go dtí Tuaisceart Éireann agus Albain, áiteanna ina bhfuil na fadhbanna céanna acu.

Dáileadh scannán

Moladh k

i) Moltar do na heagraíochtaí náisiúnta pictiúrlann (ina measc Cumann na nDáileoirí Scannán, Comhlachas Taispeántóirí Scannán, Comhairle Scannán na RA) go gcuirfí dialóg ar bun idir lucht dáilte agus lucht taispeána chun athbhreithniú a dhéanamh ar chleachtais dáilte chun go gcuirfí deiseanna nua táirgiúla ar fáil do phictiúrlanna na mbailte beaga agus na gceantar faoin tuath.

ii) Moltar go ndéanfaí athshainmhíniú ar an gcaidreamh idir an dáileoir (cinsire) agus an taispeántóir i dtaca le heisiúintí digiteacha de agus é a bheith mar cheann de na príomhchúramaí a leagfaí ar an Tascfhórsa.

Eolas agus monatóireacht

Moladh L

Moltar go gcuirfeadh Tascfhórsa na hÉireann agus Tascfhórsa na Breataine Bige achoimre bhliantúil ar fáil ina mbeadh eolas faoi na hearnálacha pictiúrlann sa Bhreatain Bheag agus in Éirinn – ón suíomh ilphléacsach go dtí cumainn scannán, pictiúrlanna soghluaiste agus féilte scannán.

Pictiúrlanna digiteacha

Moladh M

i) Moltar go gcuirfeadh an Cuibhreannas Pictiúrlann Cultúrtha idir threoir agus mhaoiniú ar fáil, b'fhéidir i gcomhpháirt le heagraíochtaí eile dála Chomhairle Scannán na RA, chun trealamh digiteach a chur ar fáil do phictiúrlanna, ina measc na hionaid ealaíon, ar mian leo a gclár a fhorbairt agus leas a bhaint as an solúbthacht agus as na deiseanna nua a bhaineann leis na teicneolaíochtaí sin.

ii) Moltar go ndéanfadh Sgrîn an iarracht chéanna chun go mbainfeadh céatadán réasúnta de phictiúrlanna na Breataine Bige leas as an Líonra Scannán Digiteach agus as an gCiste Digiteach le haghaidh Taispeána Neamh-Amharclainne ata á fheidhmiú ag Comhairle Scannán na RA.

iii) I dtéarmaí níos leithne, moltar do na comhlachtaí náisiúnta comhoibriú leis na dáileoirí scannán agus na taispeántóirí chun modúil nua a fhorbairt maidir le cláir agus maidir le háirithint agus a bhainfeadh leas as an teicneolaíocht digiteach – solúbthacht sceidealaithe, an cumas chun prionta a choinneáil fad is atá sé ag teastáil ón bpictiúrlann, bealaí nua clárfhorbartha – ar mhaithe leis an lucht féachana.

iv) Moltar go n-eagrófaí seimineár nó ceardlann d'úineirí na bpictiúrlann, lucht ceaptha na gclár, dáileoirí, criticeoirí agus rannóga margaíochta chun na deiseanna nua cláraithe a chuireann an scannánaíocht digiteach ar fáil a scrúdú agus na bacanna atá sa tslí ar an gcur chuige neamhthraidisiúnta. Is é a bheadh mar aidhm ag na himeachtaí sin athchuairt a thabhairt ar pharaidím na gclár pictiúrlainne atá faoi smacht na modúl traidisiúnta ilphléacsach.

Introduction

This report, entitled *The cultural and economic trends of Cinema in Ireland and Wales*, consists of a detailed cinema audit in the two countries, concentrating on designated EU Interreg IIIA zones. The Interreg IIIA zone in Ireland includes Dublin, Carlow, Kilkenny, Kildare, Meath, South Tipperary, Waterford, Wexford and Wicklow. In Wales, the zone includes Carmathenshire, Ceredigion, Conwy, Denbighshire, Gwynedd, Pembrokeshire and Ynys Mon. The study also considers the wider picture in each country, examining the potential for future co-operation and establishing joint initiatives between the two regions.

At the outset of the research, the two commissioning organisations commented:

"Our intention with this study is to conduct a thorough audit of cinemas in Wales and Ireland, and to co-develop a strategy for future development. Particular attention will be given to structural and equipment standards and the research will look into new media applications and issues relating to access." (Sgrîn)

"With major technical changes within cinema on the horizon and a changing legislation regarding disability access, the need for specialised research of this kind is imperative if Irish audiences are to continue to have high quality cinema experiences." (Arts Council)

1.1 AIMS OF THE STUDY

The study is intended to inform cinema exhibition policy and decision making for both Sgrîn and the Arts Council. The aim is to conduct a thorough research audit of cinemas in Wales and Ireland to provide baseline data to co-develop a strategy for future development.

The brief for the audit focussed on areas including:

- Standards of technical equipment
- Quality of buildings
- Accessibility issues
- Quality and quantity of programming (both mainstream and cultural)
- Staffing
- Audience levels and development
- Local authority support and co-operation

Additional aims of this research include:

- Production of a report which raises cinema up the cultural agenda, especially with local authorities and government bodies. To fill gaps in current knowledge on the cinema sectors in both countries and assist with the development of spatial strategies.
- Identification of opportunities to broaden programme choice outside the capital cities. Collation of information on programming trends and identification of materials and activities which can lead to a more diversified programme for local communities. Improving opportunities for cinema attendance throughout both countries.
- Identification of methods of promoting Irish and Welsh film productions in cinemas throughout Ireland and Wales.
- Identification of opportunities to design coordinated schemes to develop the cinema sectors in Ireland and Wales, especially in market town and rural communities.
- Establishment of priorities for developing skills and knowledge of personnel in the cinema sectors (including programming, marketing, managerial and technical staff development) again primarily in market town and rural areas).
- Promotion of good quality architecture and design in the cinema sector.

1.2 METHODOLOGY

The research has been carried out using the following methodology:

- Collation of information and reports on cinema in Ireland and in Wales.
- Creation of a comprehensive computerised database which brings together information from a range of sources including primary research.
- Development of a detailed questionnaire to use with cinemas.[1]
- Face to face visits by the consultants to approximately half the cinemas in both countries, with priority being given to cinemas within the Interreg III zones.
- Supplementary questionnaire research (via post, email and telephone) with the remaining cinemas.
- Consultations in person, by telephone, email and post with a wide range of organisations including film festivals, film societies, film exhibitors, film distributors, education organisations, disability access organisations, broadcasting and funding organisations.

[1] The questionnaire was influenced by a survey of UK cultural cinemas conducted by Inglis Todd Consultants for the British Film Institute (2000) and by the Unesco 'Manual on systems of inventorying immovable cultural property' by Meredith Sykes (1984)

- Production of a series of maps illustrating the distribution of cinemas throughout both countries.
- Production of a final report.

Cinema definition

In this study the term 'cinema' indicates a venue where general or specialist release films are screened to the paying public. Full-time and part-time cinemas are included as are arts centres and multi-use venues which have a cinema function. Film societies and film festivals complement cinema exhibition and are treated separately in the study.

1.3 CINEMA VISITS

The core of the research involved a series of visits to cinemas throughout Ireland and Wales during July, August and September 2003. In line with the brief, at least 50% of the cinemas in the Interreg IIIA zones and at least 33% of the remaining cinemas were visited by the consultants.

Table 1.1 details the number of cinemas visited in each country and in each Interreg zone. Table 1.2 and 1.3 detail the specific cinemas visited.

1.3.1 Proportion of cinemas visited

	Interreg zone cinemas		Non-interreg cinemas		Total cinemas	
	Nº cinemas	Visited	Nº cinemas	Visited	Nº cinemas	Visited
Ireland	26	17	38	14	64	31
Wales	24	15	33	15	57	30
Total	50	32	71	29	121	61

Table 1.1

1.3.2 Cinemas visited in Ireland

Cinema name	Operator	Town	Interreg	Screens
Ormonde	Ward Anderson	Arklow	Y	2
Abbey Centre Cinema	Abbey Centre Trust	Ballyshannon	N	1
Cineplex	Michael Collins	Bray	Y	7
Cineplex	Independent	Bundoran	N	6
Savoy Cineplex	Ward Anderson	Carlow Town	Y	3
Gaiety	Independent	Carrick-on-Shannon	N	1
Capitol Cineplex	Ward Anderson	Cork City	N	6
Kino	Independent	Cork City	N	1
The Gate Multiplex	Cork Cinemas	Cork City	N	6
Irish Film Centre	Irish Film Institute	Dublin City	Y	2
Savoy	Ward Anderson	Dublin City	Y	6
Screen	Ward Anderson	Dublin City	Y	3
IMC	Ward Anderson	Dun Laoghaire	Y	12
Ormonde	Graham Spurling	Dungarvan	Y	2
Slaney Plaza	Graham Spurling	Enniscorthy	Y	3
Omniplex	Ward Anderson	Galway City	N	11
Screen by the Sea	Graham Spurling	Greystones	Y	1
Ster Century	Ster Century Cinemas	Liffey Valley	Y	14
Limerick Filmhouse [2]	Belltable Arts Centre	Limerick	N	P/t 2
Omniplex	Ward Anderson	Limerick City	N	12
Savoy Cineplex				
(+Central Studio)	Ward Anderson	Limerick City	N	6
The Reel Cinema	Reel Picture Cinemas	Mallow	N	4
Ormonde	Independent	Middleton	N	2

Table 1.2 (Continued over leaf)

[2] Limerick Filmhouse is a proposed new cultural cinema, being developed under the auspices of Belltable Arts Centre

Introduction

1.3.2 Cinemas visited in Ireland contd				
Cinema name	Operator	Town	Interreg	Screens
Dara Cinema	Storm Cinemas	Naas	Y	2
Diamond Cinema	Diamond Cinemas	Navan	Y	6
Oscar Cinema	Independent	Newbridge	Y	3
Gaiety Cinema	Independent	Sligo Town	N	12
Excel Centre	Excel Heritage Centre	Tipperary Town	Y	3
Cineplex	Ward Anderson	Waterford City	Y	5
Cineplex	Ward Anderson	Wexford Town	Y	3
Regal Cinema	Independent	Youghal	N	3

Table 1.2

1.3.3 Cinemas visited in Wales					
Cinema name	Operator	Town	Interreg		Screens
Aberystwyth Arts Centre	University of Wales - Aberystwyth	Aberystwyth	Y		1
Commodore Cinema	Michael Davies Partnership	Aberystwyth	Y		1
Plaza Apollo Cinema	Apollo Cinemas	Bangor	Y		2
Theatr Gwynedd	Theatr Gwynedd Ltd	Bangor	Y	P/t	1
Neuadd Ogwen	Independent	Bethesda	Y	P/t	1
Blaenafon Workmens Hall	South Wales Cinemas	Blaenafon	N	P/t	1
Odeon Cinema	Odeon Cinemas	Bridgend	N		9
Chapter Arts Centre	Chapter (Cardiff) Ltd	Cardiff	N		2
Ster Century Cinemas	Ster Century Cinemas	Cardiff	N		14
Theatr Mwldan	Theatre Mwldan	Cardigan	Y		1
Public Hall	Cross Hands Public Hall				
Management Committee	Cross Hands		Y		1
Theatr Gwaun	Pembrokeshire County Council	Fishguard	Y	P/t	1
Canolfan Ucheldre Centre	Ucheldre Centre Friends Association	Holyhead	Y	P/t	1
Empire Cinema	South Wales Cinemas	Holyhead	Y		1
Llanelli Entertainment Centre	Carmarthenshire County Council	Llanelli	Y		3
Maesteg Town Hall	Maesteg Town Hall Ltd	Maesteg	N	P/t	1
Torch Theatre	Torch Theatre	Milford Haven	Y	P/t	1
Theatr Clwyd	Flintshire County Council	Mold	N		1
Showcase Cinemas	National Amusements UK	Nantgarw	N		12
City Cinema	South Wales Cinemas	Newport	N		3
Muni Arts Centre	Muni Arts centre	Pontypridd	N	P/t	1
Apollo Cinemas	Apollo Cinemas	Port Talbot	N		6
Coliseum Cinema	Coliseum Cinema	Porthmadog	Y		1
Neuadd Dwyfor	Gwynedd County Council	Pwllheli	Y	P/t	1
St Donats Arts Centre	St Donats Arts Centre	St Donats	N	P/t	1
Taliesin Arts Centre	University of Wales - Swansea	Swansea	N	P/t	1
UCI 10	UCI Cinemas	Swansea	N		10
Phoenix Cinema	Rhondda Community Business Ltd	Ton Pentre	N		1
Tywyn Cinema	Independent	Tywyn	Y		1
Pola Cinema	Independent	Welshpool	N		2

Table 1.3

1.4 KEY TRENDS

1.4.1 Increasing dominance of mega-hits

The cinema business continues to be dominated by a small number of 'franchise' titles, notably the *Lord of the Rings, Harry Potter, Star Wars* and the *James Bond* series.
In 2002 the top 20 releases in the UK and the Republic of Ireland accounted for 60% of box office revenue but just 5.4% of all titles. Conversely, 269 releases (73%) accounted for only 5.6% of box office revenue. A total of 369 films were released – an average of one every day – a 5% increase on 2001.[3]

1.4.2 Low level of attendances for foreign language films

Foreign language films, defined here as non-English language and non-Hindi language (Bollywood films), account for 76 of the titles released in the UK and Ireland in 2002 (one title every five days, 20% of all titles) but earned just 1.2% of box office revenues.

1.4.3 Success for local productions

Irish films in particular had a good year in 2003 with titles such as *Intermission, Song for a Raggy Boy, Goldfish Memories, Dead Bodies, Spin the Bottle,* and *The Magdalene Sisters* attracting a total of over and million admissions and earning over six million. The success of these films, and the Hollywood produced *Veronica Guerin*, located in Ireland, helped Irish cinemas over a poor period for Hollywood mega-hits during summer 2003.

1.4.4 Greater emphasis on opening weekends

Two-thirds of the box office for the year was taken at weekends. Opening weekends accounted for one quarter of the total box office. The majority of film distribution and marketing effort is devoted to achieving the best possible result over these first three days.

Box office percentage share by weekday			
Friday	17%	Monday	7%
Saturday	29%	Tuesday	8%
Sunday	21%	Wednesday	9%
(Weekend	68%)	Thursday	8%
		(Weekday	32%)

Table 1.4 Source: Neilsen EDI

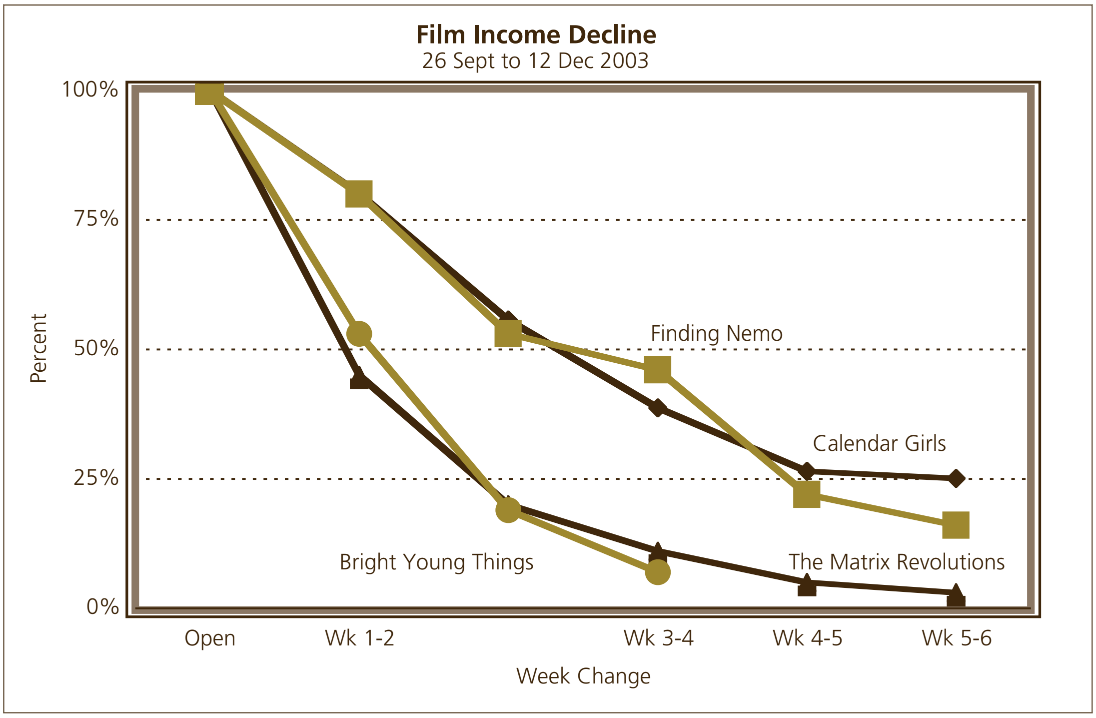


Chart 1.1 Source: Screen International

[3] Data from 'Film in the UK 2002 Statistical Yearbook', UK Film Council

Introduction

A corollary of this emphasis on the opening few days is that the 'shelf life' for most films has dramatically shortened over the past decade. In practical terms few films have a commercial life beyond the first four-weeks of release.

The box office income for the first few weeks of several films released in autumn 2003 is illustrated in Table 1.1[4] The films with the slowest decline are *Calendar Girls* and *Finding Nemo*. The steepest declines are for films such as *Bright Young Things.*

1.4.5 Broadening of the age of cinema audiences

The London-based Cinema Advertising Association's (CAA) annual survey of the 2002 film year reveals that almost three-quarters of the UK population (71%) went to a cinema at least once in the year, while 26% went once a month or more.

The survey confirmed the popular view that the most frequent cinemagoers are teenagers (12-14 years old) and young adults (20-24 years old), with half of the people in these groups attending at least once a month. However a quarter of people aged 35–44 years and one-in-12 people aged 55 years or older attend at least once a month. The broad spread of age groups who now attend cinema regularly is affecting cinema design and operation. For example, the Vue Cinemas circuit is planning more café bars in its cinemas to replace computer games arcades, and their stated strategy aims to attract a much greater number of middle aged and older audiences.[5]

1.4.6 Rise in importance of DVD releases

According to the British Video Association the UK's video/ DVD rental and retail businesses are now worth over three times as much as the UK theatrical market. While 2002 saw record cinema admissions of 175.9 million in the UK (and 17.3 million in Ireland), an almost identical 176 million videos and DVDs were rented and 169 million videos and DVDs were sold.[6] Box office failure can still be a success for the studios if the title sells well in the DVD format.

Similar trends are evident in other European countries where DVDs are becoming the primary source of income with some distributors estimating that the disks now account for two-thirds of their turnover.[7] This already constitutes an alternative distribution channel to rival the theatrical market, although an initial theatrical release is still considered essential in order to get publicity, reviews and the attention of cinema enthusiasts.

Alongside the success of new release titles on DVD, there has been a rapid expansion of the 'back catalogue' or library product available on disk. Many of these titles are available from specialist mail order or mail rental companies such as Belfast-based Blackstar or Hereford-based Moviemail, which has a library of over 3,000 titles for mail rental, many of them arthouse and cinema classics.[8] City Screen's partner Arts Alliance has also launched a similar internet-based DVD rental service 'Lovefilm.com'.

1.4.7 Gradual emergence of digital cinema

The production, post-production, distribution and projection of cinema films increasingly involves digital media technologies. The results are truly impressive but the lack of agreed technical standards and business agreements between distributors and exhibitors has stalled the widespread adoption of digital cinema. Worldwide, there are less than 200 cinemas capable of screening high-definition digital video – none in either Ireland or Wales. The spread of lower quality E-cinema video projectors has, in contrast, been rapid, with over 6,500 screens now using these mid-range projectors for pre-show material, mainly advertising and some trailers.[9] [D-cinema is discussed further in Chapter 10]

1.4.8 Changes in public funding support

Public sector support for the arts, and specifically for cinema, continues to change in response to changing government policies, new legislation, and especially the availability of funding. Key changes in recent years include:

- New national arts and cinema funding – In the UK, the Film Council has announced substantial new funds directed towards the cinema sector. The main fund will create a digital cinema network with up to 250 screens (at least 150 sites) being equipped with

[4] Data from Screen International. Three-day weekend box office for UK and Ireland combined
[5] Tim Richards, CEO of Vue Cinemas, interviewed in Leisure Report June 2003
[6] Data cited in the UK Film Council statistical yearbook 'Film in the UK 2002'
[7] See Screen International, 13 Feb 2004, 'In Focus'
[8] See www.blackstar.co.uk, www.moviemail-online.co.uk, and www.lovefilm.com
[9] Carlton Screen Advertising is the leading exponent of E-cinema / pre-show digital in the UK and Ireland

high end digital cinema equipment. Other funds support distribution and access initiatives as well as digital non-theatrical exhibition (for example film societies and clubs). In Ireland the establishment of the Cultural Cinema Consortium provides a vital new source of funding to develop new cultural cinemas as well as to refurbish and re-equip existing cultural cinemas.

- Declining National Lottery funding – In Wales, and throughout the UK, capital projects, which during the late 1990s might reasonably have expected to receive capital funding from the National Lottery, now find that source to have largely dried up.
- Loss of ERDF funding – European Union capital and project funding, usually available through the European Regional Development Fund, is declining and is not expected to be replaced. In recent years, these funds have been particularly helpful for many disadvantaged regions including areas in both Ireland and Wales.
- Focus on local authorities – Local authorities are facing increasing pressure to provide cost effective local services, including arts and leisure provision. In the UK, 'Best Value' surveys of local communities have regularly revealed that the provision of a local cinema is one of the two or three most wanted facilities. In general, local authorities have found it difficult to provide the financial support that would allow this public wish to be satisfied, although some local authorities are currently developing new arts centres which will have a cinema facility.

1.4.9 Trends in cinema building design

In 2001, Box Office magazine surveyed the leading cinema architects in the USA for their views of how cinema design might evolve over the next decade. The dominant opinion was that cinema design would rediscover "a new-and-improved past" with designs that resonate with the spirit of an earlier era. They predict a reintroduction of balconies and even private boxes for small groups,[10] more refreshment and food choices, and a more town-centre ambience. "More quality and less quantity" is a common theme.

American cinema designers point out that the dominance of the "youth audience" is coming to an end. In the future, the designers suggest that exhibitors will begin to cater more to older audiences, enticing them with more comfortable seats, more elegant surroundings and more sophisticated concessions. Other trends that designers and architects predict include a broader range of leisure facilities such as bookshops and areas where live music can be performed (as already occurs in some specialist cinemas such as the Irish Film Institute and Chapter Arts).

There is little agreement about the impact of digital technologies. Some designers anticipate that projection rooms will be eliminated and therefore new cinema designs can be more conveniently arranged. However the evidence to date suggests that if this occurs, it will tend to be more evident in smaller cinema venues where lower power projectors can be used successfully.

1.5 STRUCTURE OF THE REPORT

The report is in four broad sections:

Chapter 1 outlines the aims of the research and provides contextual data for the cinema sectors in Ireland and Wales.

Chapters 2 – 7 detail the results of the audit and field study undertaken in the summer and autumn of 2003.

Chapters 8 – 12 examine major issues identified during the research, gaps in cinema provision, issues of accessibility, the advent of digital cinema technologies, the current state of public funding for cinema, and a discussion on the impact of cinemas.

Chapter 13 outlines a series of recommendations following from the audit and research.

[10] The recently built 280 seat cinema at the Tricycle Theatre in West London has an 11-seat private box in a balcony to the right hand side of the projection booth. The entire box can be booked for groups or private parties

Context

2.1 CURRENT SITUATION

What follows is an overview of the current situation in Ireland and Wales bringing together key statistics on sites, screens, population density, ticket price and admission estimates.

At the time of this research (the second half of 2003), there were 64 cinema sites in Ireland and 57 in Wales accounting for a total of 328 and 173 screens respectively.

Table 2.1 below brings data together to allow an easy comparison of the overall cinema provision in Ireland and Wales.

At the national level, Ireland has a more geographically dispersed cinema sector, but in contrast has more screens per 100,000 population than Wales.

There is an average of five screens per cinema site in Ireland, whereas there is an average of three screens at each Welsh cinema site. This statistic is strongly influenced by the predominance of multiplexes in or near to the major cities and does not reflect the reality of cinemagoing in the market town and rural areas of both countries which are served by non multiplex cinemas.

The annual frequency of cinemagoing per capita in Ireland (4.5 visits per year in 2002) is the second highest rate in Europe, only surpassed by Iceland's 5.7 visits per year. Admission figures are not available for Wales separately from the UK, but the evidence of this study is that the rate is likely to be slightly below the UK national rate of 3.0 visits per year (2002).

There has been a rapid and substantial growth in the number of cinema sites in Ireland (+45% built in the past ten years), accompanied by a doubling of the cinema audience. In Wales there has been a much smaller addition to the cinema stock but the number of cinema venues in rural areas continues to be substantial (31% in towns with less than 5,000 population).

Cinemagoing is a relatively less expensive activity in Ireland than in Wales. The adjusted average ticket price [11] of €5.62 / £3.93 in Ireland is 22% less expensive than the €6.84 / £4.78 applicable in the UK.

Cinema attendance, ticket price and other typical sector data is not collated specifically for Wales by the main cinema research organisations such as the UK Film Council, Dodona Research, EDI Neilsen, or Mintel. Instead data for Wales is combined with a region around Bristol, Bath, Taunton, Yeovil – based on independent television regions.

The non-Wales component of the region includes one of the UK's most densely screened cities – Bristol – and is estimated to account for approximately one-third of the combined 'Wales and West' region.[12] In 2003 the combined region attracted 10.8 million cinema admissions.[13] On a pro-rata basis Wales would therefore have a total cinema attendance of approximately 7.1 million admissions.

2.2 CINEMA PROVISION OVERVIEW

The following two maps show the cinema provision in Ireland and Wales at the time of the research study in summer/autumn 2003. (Note that Map 2.1 does not include art centres in Ireland which only offer a film society/club programme).

Cinema provision in Ireland & Wales – 2003

Country	N° Sites	N° Screens	N° Seats	Screens per 1,000km2	Screens per 100,000 pop	Persons per seat
Ireland	64	328	59,732	4.8	8.4	64
Wales	57	173	40,564	8.3	6.0	72

Table 2.1

[11] The adjusted average ticket price is calculated "to eliminate the differences between countries at a price level of an identical basket of goods and services" (Media Salles: European Cinema Yearbook, p71)

[12] At least 16 sites, 78 screens and 16,839 seats – data from BFI Film & Television Handbook 2003

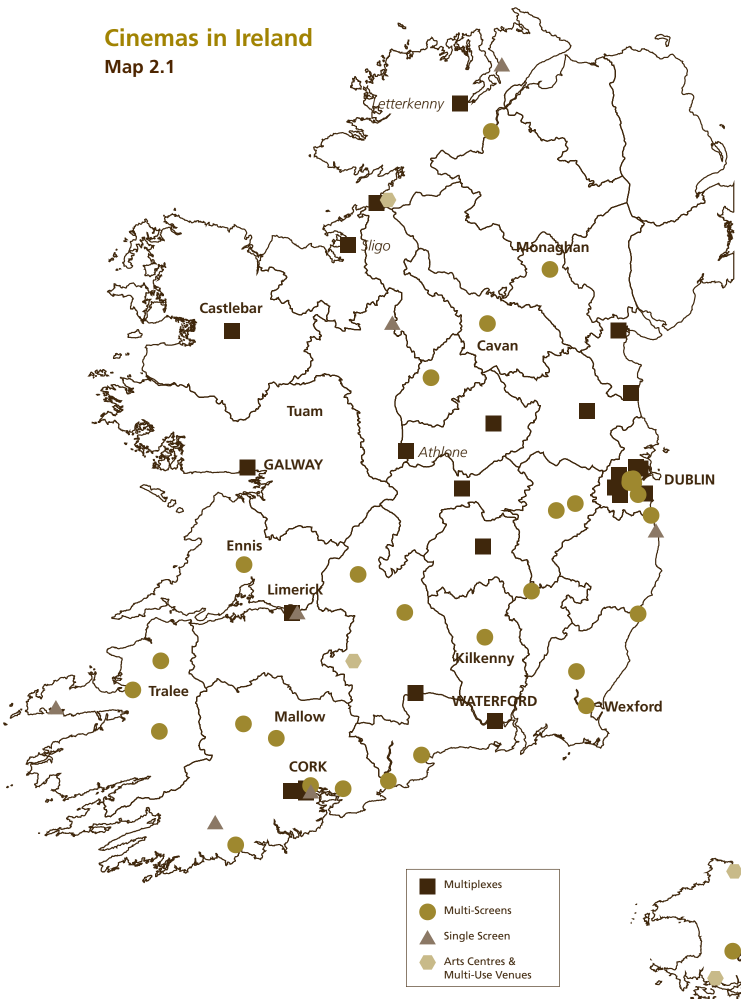
[13] Data reported in The Guardian, 4/3/04

Notable features of the cinema sector		
2002	**Ireland**	**Wales**
New cinemas	29 (45%)	9 (15%)
Rural cinemas	9 (14%)	18 (31%)
Admissions	17.3 million	~ 7.1 million
Adjusted ticket prices*	€5.62 / £3.93	€6.84 / £4.78

Table 2.2

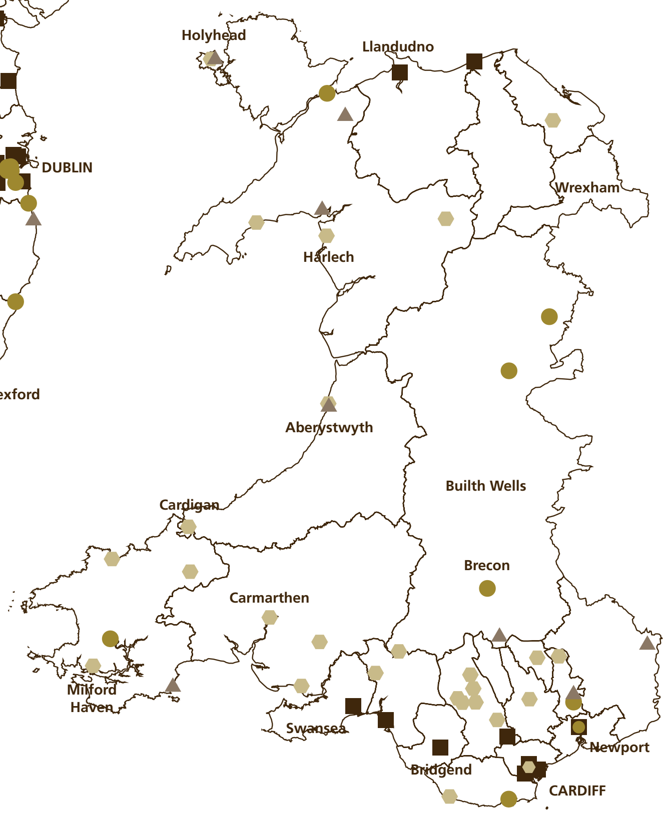
Cinemas in Ireland

Map 2.1



Cinemas in Wales

Map 2.2



Context

2.3 NATIONAL OVERVIEW

Table 2.3 below provides a snapshot of the cinema sectors in Ireland and in the UK based on data from the European Cinema Year Book and Media Salles. The statistics for the UK combine the four nations: Wales, Scotland, Northern Ireland and England.

The UK average of 5.8 screens per 100,000 population [14] is similar to that found in Italy and Germany but is two-thirds lower than France, almost half the average for Australia, and well below the 12.9 per 100,000 in the USA. The Irish average is 8.4 screens per 100,000 population, close to the French average. In international terms, the UK is arguably under-screened with significant room for expansion. The data from the present survey suggests that Wales has a slightly higher level of cinema provision than the UK overall, but there are wide variations which are explored later in this report.

2.4 THE PAST DECADE

The cinema sector worldwide has changed greatly in recent years. The advent of multiplexes, stadium seating, and new digital sound technologies have dramatically enhanced the in-theatre experience. In the UK, the National Lottery provided funds for many new or redeveloped not-for-profit arts centres, community halls and cultural venues including cinemas. In Ireland, three international multiplex operators set up large and impressive new venues. Cinema admissions in both countries have grown strongly since the mid-1980s. Table 2.5 highlights key changes to the sector in both countries.

The decline in the number of cinema sites in Ireland is largely the result of older, uneconomic cinemas closing, in some instances as a result of a new multi-screen or multiplex cinema opening within the catchment area. In most instances the newer cinemas have more screens than the venues which close.

2.5 SECTOR STRUCTURE

The composition of cinema types between both countries is markedly different (see Tables 2.6 and 2.7 overleaf). There is a much higher proportion of multiplex cinemas[18] in Ireland than Wales, 25 compared to 11 respectively. There is also a higher proportion of multi-screen screen sites in Ireland than in Wales.

Comparisons of cinema sectors in Ireland [15] & UK 1992 – 2002

	Ireland			UK		
Description	1992	2002	Change	1992	2002	Change
Population (000s)	3,547	3,883	9%	57,907	58,928	2%
N° of cinemas	81	69	-15%	681	775	14%
N° of screens	189	326	72%	1,763	3,402	93%
N° of seats	37,853	61,815	63%	516,000	746,449	45%
N° of screens per 1000 Km^2	2.7	4.7	74%	7.3	14.1	93%
N° of screens per 100,000 pop.	5.3	8.4	58%	3.0	5.8	90%
Admissions (000s)	8,300	17,319	109%	98,045	175,903	79%
Annual admissions per capita	2.3	4.5	91%	1.7	3.0	76%
Annual admissions per seat	219	280	28%	190	236	24%
Average ticket price (Euros)	3.26	5.40	66%	3.50	6.71	92%
Adjusted average ticket price		5.62			6.84	
Density of screens in multiplexes [16]	17%	34%	98%	25%	59%	135%
Concentration in cinema exhibition [17]		53%			43%	

Table 2.3 Source: Media Salles. European Cinema Yearbook 2003

[14] Source: Dodona Research

[15] This audit does not incorporate data for Northern Ireland

[16] Media Salles defines 'multiplex' as a purpose built cinema with at least 8 screens

[17] 'Concentration' refers to the proportion of cinema screens controlled by the leading three exhibitors (as measured by total admissions)

[18] In line with research organisations such as Dodona Research this report understands the term 'multiplex cinema' to refer to a purpose built cinema with five or more screens, built after 1984. It therefore excludes conversions of existing cinemas to create multi-screen sites

Cinema sector in Wales			
Description	**Pro-rata estimate 2001**	**Research findings 2003**	**Variation**
Population (000s) [19]	2,903,085	2,903,085	0%
Nº of cinemas	37	57	54%
Nº of screens	157	173	9%
Nº of screens per 1000 Km^2 [20]	7.6	8.3	10%
Nº of screens per 100,000 pop.	5.4	6.0	10%
Nº of seats	36,154	40,564	12%
Admissions (000s)	7,557		

Table 2.4

Cinema sector trends 1992-2002 [21]		
	Ireland	**UK**
Nº of Cinemas	– 15%	+ 14%
Nº of Screens	+ 72%	+ 93%
Nº of Admissions	+ 109%	+ 79%
Average ticket prices	+ 66%	+ 92%

Table 2.5 Source: Media Salles. European Cinema Yearbook 2003

Structure of the Irish public cinema sector				
Ireland - Interreg	**Sites**	**Screens**	**Seats**	**Seats/Scr**
Arts centre / theatres	1	3	606	202
Single Screens	1	1	120	120
2-4 Screens	11	29	5,433	187
5-8 Screens	3	20	3,902	195
Multiplexes	10	100	21,279	213
	26	**153**	**31,340**	**205**
Ireland - Other	**Sites**	**Screens**	**Seats**	**Seats/Scr**
Arts centre / theatres	1	3	524	175
Single Screens	6	6	1,036	* 207
2-4 Screens	14	47	7,449	158
5-8 Screens	2	12	1,996	166
Multiplexes	15	107	17,387	162
	38	**175**	**28,392**	*** 163**
* Corrected to allow for missing seating capacity data for Limerick Savoy 2 cinema				
Ireland - Total	**Sites**	**Screens**	**Seats**	**Seats/Scr**
Arts centre / theatres [22]	2	6	1,130	188
Single Screens	7	7	1,156	193
2-4 Screens	25	76	12,882	170
5-8 Screens	5	32	5,898	184
Multiplexes	25	207	38,666	187
	64	**328**	**59,732**	**183**

Table 2.6

[19] The population figure for Wales is based on the UK 2001 Census. Wales accounts for 4.85% of the UK population

[20] The land mass of Wales is approximately 20,770 Km2. Source BBC

[21] Admission price comparisons are based on the index of average ticket prices deflated using the consumer price index in each country

[22] The two arts centres/multi-use venues in Ireland included in this audit are the Excel Heritage Arts Centre in Tipperary and the Abbey Centre in Ballyshannon which has one multi-use auditorium, plus two dedicated cinema auditoria. Other arts centres in Ireland are included in the section on film societies

Context

Structure of the Welsh public cinema sector				
Wales - Interreg	**Sites**	**Screens**	**Seats**	**Seats/Scr**
Arts centre / theatres	14	17	5,461	321
Single Screens	6	6	2,309	385
2-4 Screens	2	4	852	213
5-8 Screens	0	0	0	0
Multiplexes	2	14	2,343	167
	24	**41**	**10,965**	**267**
Wales - Other	**Sites**	**Screens**	**Seats**	**Seats/Scr**
Arts centre / theatres	15	17	4,957	* 310
Single Screens	3	3	884	295
2-4 Screens	6	14	2,391	171
5-8 Screens	0	0	0	0
Multiplexes	9	98	21,367	218
	33	**132**	**29,599**	*** 224**
* Corrected to allow for missing seating capacity data for Welfare Hall in Tylorstown				
Wales - Total	**Sites**	**Screens**	**Seats**	**Seats/Scr**
Arts centre / theatres	29	34	10,418	309
Single Screens	9	9	3,193	399
2-4 Screens	8	18	3,243	180
5-8 Screens	0	0	0	0
Multiplexes	11	112	23,710	212
	57	**173**	**40,564**	**236**

Table 2.7

2.5.1 Not-for-profit venues

It is particularly notable that in Wales there is a high number of public cinemas based within arts centres or theatres. These account for 30 sites with a cumulative total of 35 screens and 10,418 seats. In Ireland, there are only two such sites, accounting for six screens and only 1,130 seats. However, the figures in Tables 2.6 and 2.7 do not include film societies or the Irish 'access CINEMA' network. Many film societies are operated by, or are based in, arts centres and mixed use venues. In some instances arts centres such as Theatr Mwldan in Cardigan operate a full-time public cinema programme as well as providing the venue for a well-established film society.

A distinction is made between full-time and part-time cinema activity in arts centres. There are eight arts centres in Wales offering full-time cinema programmes, four of which are multi-screen venues. The remaining 22 venues all operate as part-time cinemas offering between two and eight performances each week, – dependant on the mix of live and film programming at the venue. The Arts Centre programme in Ireland, through the 'access CINEMA' network, is both seasonal and more part time.

The cinema sector in both countries can be described in terms of commercial and not-for-profit organisations. Here the term 'commercial' includes major and minor circuits as well as commercial independent cinemas, while 'not-for-profit' brings together arts centres, multi-use venues (usually theatres with a cinema capability, or vice versa), cultural cinemas, community halls, miners welfare halls, workmens institutes and film societies.

Arts centre and multi-use venue cinema provision						
Country	Sites	Full-time cinema	Part-time cinema	Film Society	Screens	Seats
Ireland	20	2	0	18	N/a	N/a
Wales	29	10	19	0	34	10,418

Table 2.8

Commercial and not-for-profit cinema provision					
Country	Commercial	Not-for-profit	Not-for-profit	Not-for-profit	Total
cinemas	(Public)	(Film society 35mm)	(Film society DVD)		
Ireland	61	3	13	13	90
Wales	26	32	——— 15 ———		73

Table 2.9

Organisation type						
	Private Sector	Sole Trader	Charitable Trust	Local Authority	Other	Total
Ireland						
Interreg	24	0	2	0	0	26
Other	34	2	1	0	1	38
Total	*58*	*2*	*3*	*0*	*1*	*64*
Wales						
Interreg	10	0	4	6	4	24
Other	14	1	7	7	4	33
Total	*24*	*1*	*11*	*13*	*8*	*57*
Total	**82**	**3**	**14**	**13**	**9**	**121**

Table 2.10

2.6 OWNERSHIP

In general, the cinema sector is controlled by private sector organisations – limited companies or PLCs. However a range of alternative ownership structures is possible. This study has revealed many of the alternatives including sole traders, university departments, local authority controlled operations, charitable trusts, community organisations and trusts.

The audit revealed marked differences between the cinema sectors in the two countries:

- Major circuits occupy 42% of Irish cinema sites, operating 57% of the screens in the country.
- Although major circuits account for just 21% of cinema sites in Wales, they provide 66% of the screens.
- Minor circuits provide 17% of screens in Ireland compared to just 6% in Wales.
- 31% of the Irish cinema sector is made up of independent commercial operators. In contrast just 12% of the Welsh sector relies on independents.
- The non-commercial and local authority sectors account for 50% the Welsh cinema sites but just 19% of the screens. In Ireland this sector accounts for 7% of sites and 2.3% of screens.

Overall, the Irish cinema sector is predominantly controlled by the private sector whereas the Welsh cinema sector has a much more diverse organisational structure. This is illustrated in the table 2.10 above.

Context

2.7 CIRCUIT OPERATORS

The national and international cinema circuit operators in Ireland and Wales are primarily concerned with modern multiplex cinemas, hence the relatively low number of sites operated by each company (Table 2.11, 2.12). The exception to this is Ireland's Ward Anderson group which is the leading exhibitor in the country. Ward Anderson's portfolio of cinema includes modern multiplexes, an art house in Dublin, and a range of multi-screen cinemas in smaller towns throughout the country.

Minor, or regional, cinema circuit operators (Table 2.13) tend to operate smaller multi-screen cinemas in medium-size towns. The rationale for each circuit is dependent on individual circumstances and opportunities. Some small circuits concentrate in a particular region (for example Cork cinemas), others are dispersed over a wide area (for example South Wales cinemas). A similarly varied pattern is evident throughout the UK. European comparisons indicate that most countries have a higher proportion of minor circuits or stand-alone cinemas than are found in the UK and Ireland.

2.8 PUBLIC FUNDING

Public funding through local authorities and national agencies was investigated during the research. Table 2.14 is concerned with revenue or project support from funding agencies and does not include capital funding support from, for example, National Lottery or Cultural Cinema Consortium funds. It illustrates the low level of national and local authority funding for venues in Ireland, reflecting to some extent the (commercial) structure of the sector. It also illustrates the higher level of local authority and national agency funding for cinemas in Wales, reflecting the high proportion of arts

Ownership structure of cinemas in Ireland and Wales					
				Concentration	Concentration
Major circuits	Sites	Screens	Seats	% of sites	% of screens
Ireland	27	188	37,718	42%	57%
Wales	12	114	24,062	21%	66%
Minor circuits	Sites	Screens	Seats	% of sites	% of screens
Ireland	13	56	9,615	20%	17%
Wales	6	11	1,970	10%	6%
Independent commercial	Sites	Screens	Seats	% of sites	% of screens
Ireland	20	75	10,613	31%	23%
Wales	7	11	2,747	12%	6%
Non-commercial	Sites	Screens	Seats	% of sites	% of screens
Ireland	3	8	1,505	5%	2%
Wales	22	24	7,615	38%	14%
Local authority	Sites	Screens	Seats	% of sites	% of screens
Ireland	1	1	400	2%	0.3%
Wales	7	9	2,958	12%	5%

Table 2.11

Major circuit operators						
	Ireland			Wales		
	Sites	Screens	Seats	Sites	Screens	Seats
Apollo	0	0	0	3	13	2,068
Cine-UK	0	0	0	1	9	1,600
National Amusements	0	0	0	1	12	2,604
Odeon	0	0	0	2	16	3,383
Ster Century	1	14	3,568	1	14	3,405
UCI	3	31	7,539	2	22	4,727
UGC	1	17	3,361	2	28	6,275
Ward Anderson	22	126	23,250	0	0	0
	27	**188**	**37,718**	**12**	**114**	**24,062**

Table 2.12

Minor circuit operators						
	Ireland			Wales		
	Sites	Screens	Seats	Sites	Screens	Seats
Cork Cinemas	2	11	2,236	0	0	0
Diamond Cinemas	2	10	1,705	0	0	0
Reel Picture Cinemas	3	13	2,233	0	0	0
Spurling Cinemas	4	13	1,957	0	0	0
Storm Cinemas	2	9	1,484	0	0	0
Circle Cinemas	0	0	0	1	2	599
South Wales Cinemas	0	0	0	5	9	1,371
	13	**56**	**9,615**	**6**	**11**	**1,970**

Table 2.13

Public funding				
	Local Authority funding		National Agency funding	
	Yes	No	Yes	No
Ireland				
Intereg	2	13	1	15
Other	0	13	1	12
Total	2	26	2	27
Wales				
Interreg	8	9	5	12
Other	10	8	7	10
Total	18	17	12	22
Total	**20**	**43**	**14**	**49**

Table 2.14

Location

3.1 GEOGRAPHICAL DISTRIBUTION

The most notable contrast between Ireland and Wales is the distribution of cinema sites. There is a relatively even distribution of cinemas across Ireland, although there are key differences in terms of cinema types. There is a comparatively broad spread of multiplex cinemas, with a very strong concentration of multiplex sites in and around Dublin County. Multiplex gaps are largely populated by two-four screen cinema sites and in a few instances five-eight screen sites.

The distribution of cinema sites in Wales is less even. Multiplex provision is lower overall and is concentrated heavily in the south east and around Cardiff with three sites on the north Wales coast at Llandudno Junction, Rhyl and in Wrexham. The density of cinema provision in the large band between these north and south bands throughout mid Wales is low.

3.2 TOWN TYPE

Table 3.2 illustrates the number of cinemas in each country according to the population size of the town or city where the venue is situated. It is noticeable that a greater number of cinemas in Ireland are located in the cities and major towns compared to Wales, and that more Welsh cinemas are located in small, rural towns.

Cinema type	Arts Centres & Theatres	Single Screens	2 to 4 Screens	5 to 8 Screens	Multiplexes	Nº Venues
Ireland						
Interreg	1	1	11	3	10	26
Other	2	5	14	2	15	38
Total	3	6	25	5	25	64
Wales						
Interreg	15	5	2	0	2	24
Other	15	3	6	1	8	33
Total	30	8	8	1	10	57
Total	**33**	**14**	**33**	**6**	**35**	**121**

Table 3.1

Type of town	Large town > 50,000	Market town 5 - 50,000	Small town < 5,000	Nº venues
Ireland				
Interreg	12	13	1	26
Other	8	22	8	38
Total	20	35	9	64
Wales				
Interreg	0	15	9	24
Other	9	15	9	33
Total	9	30	18	57
Overall total	**29**	**65**	**27**	**121**

Table 3.2

[23] Data reported in The Guardian, 4/3/04

3.2.1 Capital cities

The characteristics of the cinema sector in the capital cities require special attention. The cinemas in both Dublin city and the greater Cardiff area account for one-third of all screens in Ireland and Wales respectively. Over half of all cinema admissions in Ireland come from cinemas in Dublin city. A similar situation exists in other countries including England where the Greater London area accounts for 26.1% of all UK cinema admissions.

While some of the most successful multiplexes in the capital cities of both countries are attracting in excess of 100,000 admissions per screen (double the UK average figure), many of the smaller venues, including the part-time cinemas, are existing (just) on attendance levels of between 7,500 and 15,000 per year.

3.3 CINEMA LOCATION

The advent of multiplex cinemas in the mid-1980s was accompanied by a trend to create leisure 'anchors' in out-of-town retail parks which had excellent transport links and large, free car parks. Since the mid-1990s this trend has changed and town centres are once again the focus of much of the new cinema building activity. In the UK this trend has been encouraged by planning guidance (PPG6 & PPG13) but there is increasing evidence from many countries that town centres are often more successful locations for cinemas than the retail parks, despite the free parking on offer.

In both countries the predominant number of cinemas are located within town centres or edge of town locations.[24]

Dublin cinema statistics

	1996	2002	Change
Admissions	5,709	8517	49%
Admission per person	6.0	7.6	27%
Nº of screens	64	98	53%
Nº of seats	15,570	22,752	46%
Persons per screen	14,886	9,721	-35%
Persons per seat	61	42	-31%
Admissions per screen	89,209	86,908	-3%
Admissions per seat	367	374	2%

Table 3.3 Source: Dodona Research, Cinemagoing 10 & 11

Location of cinema venue

	Town Centre	Edge of Town	Out of Town	Retail Park	Campus	Total data	Total nº venues
Ireland							
Interreg	14	6	1	1	0	22	26
Other	10	6	1	2	0	19	38
Total	24	12	2	3	0	41	64
Wales							
Interreg	19	5	0	0	0	25	24
Other	23	5	2	2	1	33	33
Total	42	10	2	2	1	58	57
Total	**66**	**22**	**4**	**5**	**1**	**99**	**121**

Table 3.4

[24] Note that Theatr Gwynedd in Bangor, Wales is part of a University campus but is listed as a town centre site because of its location.

Location

3.4 CATCHMENT POPULATION

Few cinemas capture data which would allow an accurate assessment of their audience catchment area. Nevertheless a combination of personal contact with audiences, mailing lists, advertising responses, and occasional surveys allow many cinemas to have a reasonable understanding of their audiences.
A total of 40 cinemas (21 in Ireland and 19 in Wales) provided estimates of their audience catchment. Their assessments fall into the following categories:

- Multiplexes – a regular, local audience living within 5-10 miles complemented by a less frequently attending audience drawn from a much larger area, in some instances up to 50-70 miles distant (for example a new, high quality multiplex which serves a large town plus a large rural hinterland).
- Older, often traditional, cinemas in medium or small size towns – typically these cinemas attract just a local audience, living mainly within three-four miles of the cinema. Few of these cinemas attract audiences who have to travel for more than 20-30 minutes.
- Cinemas in rural areas – again these cinemas rely principally on a local audience but because they provide the only cinema provision in a large rural area they attract audiences who are willing to travel much further (20+ miles) to see particular films.

Arts centres and multi-use venues often have more detailed audience data than commercial cinemas. In some instances, these not-for-profit venues attract audiences from a larger area than might otherwise be expected for cinema screenings, probably due to the programme choice and to their marketing efforts which are designed to attract audiences (for films and other artforms) from a wide catchment area.

3.5 TOWN SIZE

The demographic data in Table 3.5 reveals that in Ireland the mid-size towns (population between 10,000 and 35,000) have achieved high real growth in the population together with a high percentage increase over the past six years. Towns with populations between 3,000 and 9,999 have seen similar increases. Though the actual population growth has been high in both the Greater Dublin and rural areas (all towns and areas with less than 1,500 people) the rate of growth is relatively slow.

3.5.1 Towns with cinemas

Using the data available from Ireland's Census 2002, the relationships between town size and cinema provision can be investigated. Table 3.6 shows how the cinema sites and screens are distributed across towns of varying sizes. It is noticeable that only one-third of towns with populations between 5,000 and 9,999 have a cinema, while approximately one-sixth of the towns with a population below 5,000 have a cinema.

It is also evident that in towns of 5,000 to 9,999 population there is almost one-quarter the number of people per cinema screen as is found in Dublin, emphasising the increased difficulty that smaller towns face when attracting audiences. Smaller towns face an even more extreme situation with less than an eleventh of the population per screen compared to Dublin.

Comparison of population growth according to town type (in Ireland)

	Population Census 2002	Actual Growth 1996-2002	Percentage Growth 1996-2002
Greater Dublin Area	1,004,614	51,922	5.5
Other cities	386,136	25,527	7.1
Towns 10,000 - 35,000	496,163	72,807	17.2
Towns 5,000 - 9,999	233,939	31,972	15.8
Towns 3,000 - 4,999	99,473	17,179	20.9
Towns 1,500 - 2,999	113,957	12,680	12.5
Aggregate rural area	1,582,921	79,029	5.3

Table 3.5

3.5.2 Market towns

In November 2000, the UK government White paper 'Our Countryside: the Future' detailed a wide range of policies and case studies with the aim of providing "a fair deal for rural England". A major section focussed on market towns and their role as "a focus for growth in areas which need regeneration, and more generally as service centres and hubs for surrounding hinterland, exploiting their potential as attractive places to live, work and spend leisure time".[26]

The White paper cited the market town 'template' strategy developed by East Midlands Development Agency which aims to specify the facilities which should normally be available in small and larger market towns. The section relating to cultural facilities is reproduced below in Table 3.7. Note that cinema provision is explicitly identified – a rare occurrence in regional government policies.

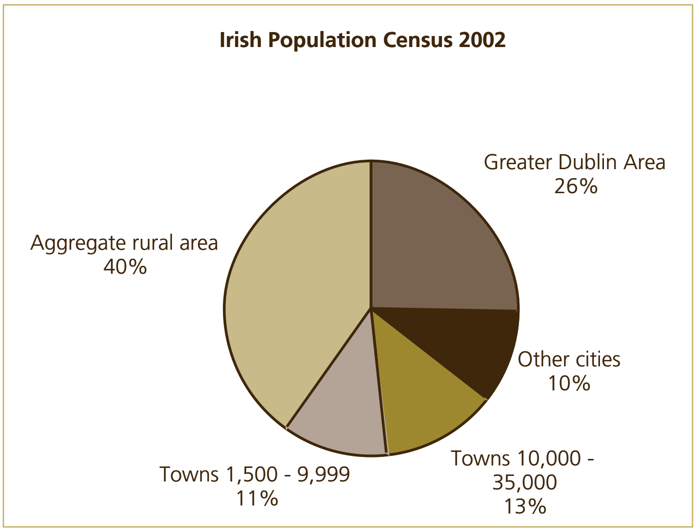


Chart 3.1

Distribution of cinemas throughout Ireland [25]

	Dublin	Cork	Other cities	Towns 10-35,000	Towns 5-9,999	Towns 1-5,000
Population	1,004,614	186,239	199,897	392,494	88,641	20,768
Nº of cities/towns	1	1	3	28	33	78
% towns with cinemas	100%	100%	100%	75%	36%	12%
Sites	12	6	4	21	12	9
Screens	104	27	29	109	34	25
Seats	23,183	5,232	4,851	17,313	5,319	3,834
Pop/Screen	9,660	6,898	6,893	3,601	2,607	831
Pop/Seat	43	36	41	23	17	5
Screens/100,000	10	14	15	28	38	120
Seats/100,000	2,308	2,809	2,427	4,411	6,001	18,461

Table 3.6

A market town template for the East Midlands (UK)

The Template	Larger Market Towns	Smaller Market Towns
Population	10,000 - 25,000	2,000 - 10,000
Cultural facilities (sports, arts and leisure)	Permanent library, range of cultural facilities, leisure centre (including swimming pool), local cinema, range of public houses and restaurants. Facilities for teenagers other than youth clubs, eg Cyber Café, parks/playareas.	Permanent library facilities, small venue for cultural provision and local arts centre. Sports pitches with changing rooms, sports hall and community hall with weekly cinema. Mix of public houses and at least one restaurant. Facility for teenagers other than a youth club plus at least one recreation park.

Table 3.7

[25] Town and city populations from Census 2002, Ireland

[26] Our Countryside: the future, Cmnd 4909 HMSO, Nov 2000, Dept of the Environment, Transport and the Regions, UK government White paper

Location

While the East Midlands template approach was widely publicised and praised it has yet to have a significant effect on the provision of cinema facilities within smaller towns in the UK, despite attention being repeatedly being drawn to this gap in provision by researchers such as Dodona Research. [27]

Applying the East Midlands template to the Irish towns data shown in Table 3.6 reveals that 18 out of the 24 'larger market towns' have cinemas. The remaining six towns are all situated close to Dublin and residents have easy access to the many cinemas in the city. In contrast, only 16 out of 88 'smaller market towns' have cinemas, although arts centres with film societies are not included in this analysis.

3.6 TRANSPORT ISSUES

3.6.1 Car parking

The ready availability of transport to and from cinemas naturally has a substantial impact on the attendances at individual cinemas. In this survey, car parking facilities and the availability of bus and train transport were examined. [Note that several cinemas had more than one type of car parking available.] Overall, 77% of Irish cinemas responding and 89% of Welsh cinemas responding were located with a proper car park adjacent to or nearby their building.

3.6.2 Bus and train transport

The distance from the cinema to the nearest bus stop varies from a few metres outside the front of the cinema right up to 300 metres in Ireland, and, in one instance, over 600 metres in Wales. The median distance in both countries is approximately 100 metres. The frequency of buses and choice of routes was not investigated but in rural areas, several cinema staff commented on the infrequent service ("one bus every two hours") and especially on the lack of late evening buses suitable for people leaving a cinema.

Trains are not generally a major form of public transport for cinemagoers – although the Cineworld multiplex in Llandudno Junction in North Wales benefits considerably from the station which is on the edge of the cinema site – but 51 venues provided details of the nearest train station. thirteen Irish cinemas detailed nearby train stations, all of them within two miles of, and many considerably closer to, the cinema. Thirty eight Welsh cinemas and arts centres gave information on train stations, all but six of them being within two miles of the cinema.

3.6.3 Transport information

In general, most of the cinemas visited and surveyed are well provided by car parking and public transport. It is notable that several of the operators of larger cinemas, and some of the arts centres, provide good transport information on their cinema web sites. A good example is the web site for UCI Cinemas which offers a map, detailed driving directions, and good information on buses and trains (if appropriate). Ster Century's web site provides good maps with details of available parking. In contrast many of the independent commercial cinemas fail to provide even basic information about where the cinema is situated or the transport options available to cinemagoers.

3.6.4 Public safety

Nine Welsh cinemas were considered to cause some concern for audiences arriving or leaving in the evening

Car parking facilities		
Location of car park	**Ireland cinemas**	**Wales cinemas**
Venue's own car park	7	20
Nearby public paid car park	13	13
Nearby public free car park	7	10
On-street parking	10	6
None available	2	0
N° cinemas responding	31	45

Table 3.8

[27] See Cinemagoing 12, 2003, Dodona Research

darkness. In most instances this was due to quiet, sometimes poorly lit streets around the cinema, and in three instances the car park areas gave cause for some concern (one in particular had a reputation for car thefts and vandalism). No similar concerns were expressed in respect of the Irish cinemas visited although a number of the older cinemas opened on to busy streets which could affect public safety.

3.7 IRISH NATIONAL SPATIAL STRATEGY

The Irish National Spatial Strategy [NSS] is a key document to which the findings of this report and any future exhibition policy in Ireland should be linked. The NSS offers a 20-year planning framework for Ireland which seeks to achieve a better balance of social, economic and physical development between regions; focusing on the relationship between people and the places where they live.

The strategy notes that: *'the pace of development [economic and population growth] in Ireland over the last decade has been remarkable. But progress has been uneven, with some areas developing faster than others. This has led to rapid development and congestion in some places, but underdevelopment in others.'* [28]

The strategy seeks to bring:

- A better spread of job opportunities
- A better quality of life
- Better places to live in

It sets out a framework for gateways, hubs and other urban and rural areas to act together and seeks to open up new opportunities in the regions which give people better choice in relation to where they work and live.

The strategy recognises the dominance of the Greater Dublin Area [GDA] with an estimated population of approximately 1.5 million at the 2002 census but stresses that 'The performance of the GDA is pivotal to the overall economic well-being of Ireland.' [29]

The NSS identifies a number of key gateway cities which are growing in strength and can play a key role in Ireland's development. In addition to Dublin, these include: Cork, Limerick/Shannon, Galway and Waterford.

The NSS affirms that these must continue to be developed and supported as engines of growth. Four new national level gateways are also identified including Dundalk and Sligo, Letterkenny and Athlone/Tullamore/Mullingar as linked gateways.
In addition to the gateways, the strategy identifies nine strategically located, medium sized hubs which will support and be supported by the gateways and will link out to wider rural areas. These nine are:

Cavan	Ennis	Kilkenny
Mallow	Monaghan	Tuam
Wexford	Ballina + Castlebar	Tralee + Killarney

The NSS also outlines measures to develop rural areas which build on local strengths, for example in agriculture, enterprise, tourism and local services.

Cinema provision and development could be linked to each of these identified areas and geographical priorities in any future exhibition strategy. The NSS also outlines five core messages which can also be related to cinema.

These are:

- A wider range of work opportunities
- A better quality of life
- Better places to live in
- Effective Urban and Rural Planning
- Getting things done

Within these, the importance of leisure activities and facilities, social needs (including cultural facilities) and highest quality of design in new development and refurbishment is emphasised.

3.8 WELSH SPATIAL STRATEGY

The Wales Spatial Plan, *People, Places, Futures*, sets out a strategy for Wales for the next 20 years. It is a consultation document and is due to be published as a final plan in 2004. It sets out 'a vision for the sustainable development of Wales; a framework for collaborative

[28] The National Spatial Strategy for Ireland 2002-2020: People, Places, Potential. Summary Guide. The Stationary Office, Dublin
[29] The National Spatial Strategy for Ireland 2002-2020: People, Places, Potential. Pg 22

CHAPTER 3

Location

working and decision making across sectoral and functional bodies; and an opportunity to bring a stronger geographic element to Welsh Assembly work, informing policy formulation, strengthening implementation, and measuring the impact of actions'. [30]

The vision states that,
'We are aiming for a dynamic, prosperous and inclusive Wales, where our heritage and environment are valued and where we work together and with our neighbours to achieve sustainable development across Wales'. [31]

In contrast to the Irish position, the strategy indicates that there has been very little change in the total population of Wales over the ten year period from 1991-2001, increasing only by 1%. There have, however, been variations between local authorities. For example, population has decreased in Merthyr Tydfil by 6% but in all the rural local authorities, except Anglesey, population has grown at above average rates.

Population migration analysis for Wales shows that young people between the ages of 16-24 are moving out of all areas, except Cardiff, Ceredigion and Swansea, often to pursue further and higher education. It also indicates that there is substantial in-migration (within Wales) by people of middle-age groups, often families with children.

Particular attention is given in the Welsh spatial strategy to the Welsh language. The draft strategy indicates that 21% of the population is able to speak Welsh, equating to an estimated 580,000 Welsh speakers.[32] The census data shows that, despite the continuing decline in the number of communities with a high proportion of Welsh speakers, the rural heartland still contains the highest proportion of Welsh speakers. However, Welsh speakers are not confined to these areas. Around 40% of Welsh speakers live in predominantly urban authorities, are mainly of school age and have gained knowledge of Welsh at school.

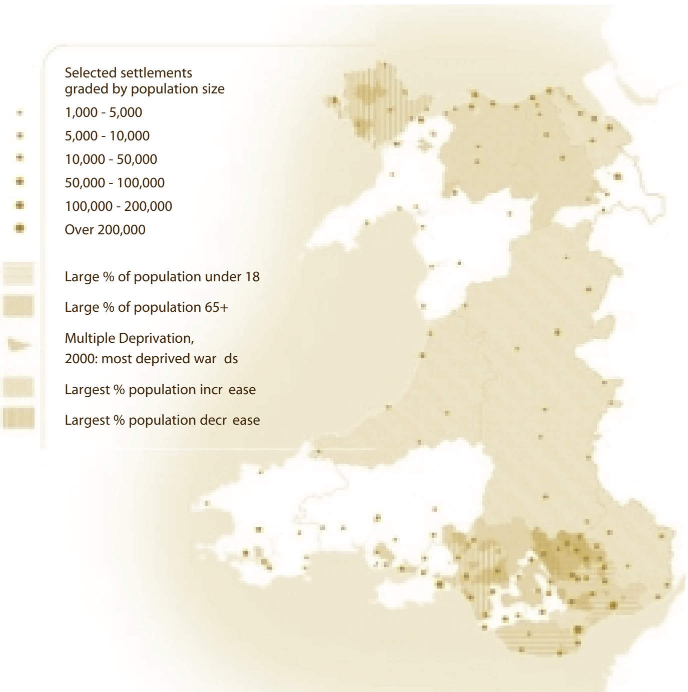


Chart 3.1 Copyright National Assembly for Wales. Reproduced with permission

Chart 3.2 Copyright National Assembly for Wales. Reproduced with permission

[30] People, Places, Futures - The Wales Spatial Plan. Consultation Draft 2003. National Assembly For Wales
[31] Ibid, pg1
[32] Taken from the 2001 UK census figures

The strategy highlights four geographical development zones that have comparable attributes, face common challenges and have similar opportunities.

Four key themes are identified across each area:
- Valuing the environment
- Building sustainable communities
- Increasing and spreading prosperity
- Achieving sustainable accessibility

(North East and South East Wales, with the most dense cinema provision) are largely urbanised and industrial areas, with nearby high quality natural environments. Their attributes include national centres providing higher order services; they have a diverse economic base including manufacturing, public services, tourism, leisure and culture.

Key measures identified under *Building Sustainable Communities* [BSC] which could relate to a future exhibition strategy include: development of metropolitan areas to provide a diverse range of social and economic opportunities and, development of safe and healthy communities. Under *Achieving Sustainable Accessibility*, relevant measures include – promotion of world class ICT connectivity.

Most of the mid central belt with a low population density, and sparse cinema provision, are predominantly agricultural areas with extensive high quality natural environment. Attributes include – growing population from a low base; sparsely populated with weak settlement structures consisting of dispersed market towns, villages and rural communities. They are a traditional stronghold of Welsh language communities, have poor access to services and are subject to social and cultural change.

Key measures identified under *Building Sustainable Communities* relevant to cinema include: Identifying small and medium towns to act as service distributors for their rural hinterlands and, encouraging co-operation between urban and rural areas partners. Under *Increasing and Spreading Prosperity,* measures include: Devising strategies to retain and attract back skilled people.

The tip of North West Wales and South West Wales with a low multiplex base and number of traditional cinema sites and arts centres, are predominantly maritime locations with high quality environment and cultural identities, have diverse settlement structures of cities, towns and rural areas and are characterised by static or declining populations. BSC measures include: identifying key centres, networks and linkages to increase the range of social and economic opportunities and; identifying key centres with potential for focusing public investment to maximum effect. Relevant measures under *Achieving Sustainable Accessibility* include, strengthening linkages within the zone and between zones to maximise potential.

The two central areas on the West and East of mid Wales, again with sparse cinema provision, are areas characterised by population growth and strengthening housing and employment markets; low population density; predominantly rural and agricultural in character; have relatively poor access to services but importantly, connect North and South Wales.

Key BSC measures of relevance to cinema include: co-operation to identify and strengthen regional towns; supporting appropriate provision of services including education, culture and leisure; strengthening linkages between towns and rural areas and identifying local centres where service provision can be optimised.

3.8.1 Spatial strategies and cinema development

It is clear that both the Welsh and Irish spatial strategies are key documents in terms of future national development for both Wales and Ireland and provide the potential for key linkages with any future cinema exhibition development strategy.

Site and building

4.1 BUILDING HISTORY

For cinema historians, the 1930s and 1940s witnessed the construction of many extravagant 'picture palaces' such as the celebrated Odeon cinemas. The decline in cinema attendances from 1946 through to the early 1980s resulted in a comparatively small number of new cinemas being built, but during the 1970s an increasing number of large auditoria were converted into twin or triple screen cinemas.

The arrival of the multiplex cinema concept in 1984 initiated the current cinema building (and attendance) boom which has continued for almost 20 years. Table 4.1 shows that over half of the cinema sites in Ireland have been constructed during the past decade, whereas only one-quarter of the cinemas in Wales are of such recent construction. Half of the cinemas in Wales were originally built prior to 1945 and 56% were not originally designed as cinemas.

4.1.1 Development of arts centres and multi-use venues

Arts centres and multi-use venues, including some cultural cinemas, have varied origins. Some, especially the newer venues, are purpose built but many others are created within adapted buildings such as former churches or community halls. The quality of the adaptation to performance and social purposes, including cinema, is equally varied with some inventive solutions overcoming considerable structural obstacles.

The impact of Lottery funding in Wales has transformed several arts centres and multi-purpose venues, the most recent being Theatr Mwldan which was a major

Date of original construction							
	Pre 1945	1945-74	1975-84	1985-94	1995 -2004	Total data	Total nº venues
Ireland							
Interreg	3	2	1	7	10	23	26
Other	5	3	0	3	18	29	38
Total	8	5	1	10	28	52	64
Ireland: 2 venues (out of 64) were not originally built as cinemas							
Wales							
Interreg	12	3	2	1	2	20	24
Other	9	2	3	1	7	22	33
Total	21	5	5	2	9	42	57
Wales: 32 venues (out of 57) were not originally built as cinemas							
Total	**29**	**10**	**6**	**11**	**38**	**94**	**121**

Table 4.1

Arts centres and multi-use venues in Wales		
	Original construction	Redeveloped during 1995-2004
1995 - 2004	1	
1985 - 1994	1	1
1975 - 1984	4	3
1945 - 1974	4	2
Before 1945	15	7

Table 4.2

redevelopment during the period of this study. Effectively this means that 14 of the 25 Welsh arts centres detailed have been built or extensively redeveloped within the past ten years.

It is noticeable in arts centres and multi-purpose venues throughout the UK and Ireland, that the special requirements of cinema screenings are often poorly accommodated at the design stage. Lack of space in projection rooms, poor sightlines, inappropriate seating (both fixed and retractable installations), and sub-standard acoustics are regularly encountered and adversely affect the cinema operation for staff and audiences alike.

4.1.2 Development of multiplexes

Recently built multiplexes dominate the cinema sectors in both countries. The five largest cinemas (by seating capacity) in Ireland and Wales account for almost one quarter of all cinema seats in Ireland and over one third of all cinema seats in Wales. All but two of these ten multiplexes (the UCI Coolock and UCI Tallaght in Ireland) were built within the past ten years. All except the UGC Newport in Wales are located in the capital cities and their immediate surrounding area.

4.2 FACILITIES

4.2.1 Entrances

Many cinemas, of all types, fail to capitalise on the opportunity to promote cinemagoing, entertainment, excitement, or even a basic welcome with the design of their cinema entrance. From poorly located and difficult-to-find entrances in arts centres through to functional designs in many of the mid-1990s multiplexes, there is often a lack of flair and distinctiveness in this important part of the cinema building.

Many of the newer cinemas such as the Gaiety in Sligo or the Odeon in Bridgend concentrate their 'wow' moments on the foyer which can be lavishly coloured and lit. Only the Apollo in Port Talbot had a prominent and friendly 'Welcome to the movies' neon sign.

Five largest cinemas in Ireland				
Cinema	Town	Screens	Seats	Built
Ster Century	Dublin City	14	3,568	1995-2004
UGC Cinemas	Dublin City	17	3,361	1995-2004
UCI Tallaght	Tallaght	12	2,759	1985-1994
UCI Blanchardstown	Blanchardstown	9	2,492	1995-2004
UCI Coolock	Coolock	10	2,288	1985-1994
Total		**62**	**14,468**	
Percentage of Irish cinema sector		*19%*	*24%*	

Table 4.3

Five largest cinemas in Wales				
Cinema	Town	Screens	Seats	Built
UGC Cardiff	Cardiff	15	3,424	1995-2004
Ster Century Cinemas	Cardiff	14	3,405	1995-2004
UGC Newport	Newport	13	2,851	1995-2004
UCI Cardiff Bay	Cardiff	12	2,675	1995-2004
Showcase Cinemas Cardiff	Nantgarw (Nr Cardiff)	12	2,604	1995-2004
Total		**66**	**14,959**	
Percentage of Welsh cinema sector		*38%*	*37%*	

Table 4.4

Site and building

Historic buildings such as Galway Town Hall or the magnificent Blaenavon Workmens Hall in South Wales are restricted in the modifications they can make to suit modern cinema requirements, but some other venues simply lack imagination and creativity in the way they create a welcoming, exciting, informative entrance.

4.2.2 Foyers

A number of different design and operational approaches were observed during the study:

- Old or adapted buildings often have small box offices and minimal concession sales areas. The additional income from concession sales in these foyers is low.
- First and second generation multiplexes or similar 10-20 year old buildings have foyers which often tend to be rectangular, functional spaces with ticket sales on one side wall and concessions on the opposite wall or facing the entrance.
- Some recently built cinemas have dramatic, often curved, sales areas, innovative lighting, video screens, and a general feeling of excitement and/or style. The latest incarnations as exemplified by the UGC in Dublin's Parnell Street or the Ster Century in Cardiff adopt a minimalist approach at the ticket selling level but then use colour and lighting extravagantly in the concession sales area.
- Cultural cinemas and arts centres often include space for book, magazine, CD, DVD and other merchandise sales, in some instances linked into local tourist promotion activities.

4.2.3 Concession sales

Confectionery, ices and soft drinks sales ('concession sales') in the foyer are critically important for most commercial cinemas. Cinema research specialist Dodona Research estimated in 2000 that, on average in the UK each cinemagoer spent 98p on concession products each time they went to a cinema. KPMG estimated the spend at 25% of the average ticket.[33]

More recently, Screen Digest published a comprehensive study of cinema concessions and, while admitting that there is very little hard data available, managed to establish a "rough rule of thumb" that "if concessions account for 25% of a cinema's revenues, they will represent around 50% of its profits."[34] The importance of concession sales is further emphasised by Screen Digest's authors who point out that operating a cinema "is two very distinct businesses: the business of acquiring and marketing movies; and the business of selling concessions."

Independent, specialised or smaller cinemas are likely to achieve lower sales and profitability levels due to: a) the smaller foyer area that these cinemas typically devote to concession sales; b) the general tendency for arthouse and older cinema audiences to spend substantially less on concession purchases (although tea, specialist coffee, wine, mineral water, and quality ice cream can be popular and profitable); and c) the terms that single cinema owners can negotiate with suppliers for concession products are unsatisfactory.

During the survey, the full range of concession sales styles were found, from basic sales at what was effectively a cupboard doorway through to the latest brightly coloured large scale multiplex concession areas. Although detailed information on sales levels was not obtained, several anecdotes (mainly from South Wales) suggested that the income from a very modest sales area could, in some instances, rival the average income from the most modern sales areas.

4.2.4 Café bars

A higher proportion of venues in Wales provide on-site

Catering service				
	Ireland		Wales	
	Yes	No	Yes	No
Food on-site	8	23	19	19
Licensed bar	5	26	20	21

Table 4.5

33 KPMG 'Specialised Exhibition & Distribution Strategy' for The Film Council, 2002
34 Screen Digest, July 2002

food and bar facilities in comparison to the cinemas surveyed in Ireland. This finding reflects the higher number of arts centres and multi-use venues in Wales which are used as public cinemas.

Two venues with on-site café bars (one in Ireland, one in Wales) [35] were due to close these facilities imminently and convert the spaces into games areas. In contrast, two Welsh arts centres had plans for significant redevelopment and expansion of their café bars during 2004.

A number of mainly multiplex, cinemas are situated adjacent to a variety of fast food outlets or food halls. Similarly many of the cinemas were located near a substantial number of bars (typically ten or more within a few minutes walk) and cafes (typically five or more within a short walking distance).

4.2.5 Other facilities

Multi-use venues and older, converted buildings tend to have general activity rooms which can be used for private functions or, if appropriate, for children's parties. Some of the more recently developed multiplexes have included similar facilities[36], especially party rooms for young children.

4.3 DISABILITY ACCESS

- 39 Irish cinemas and 47 Welsh cinemas provided some information relating to disability access.
- 23 Irish cinemas and 31 Welsh cinemas have adapted toilets for wheelchair users.
- 19 Irish cinemas and 32 Welsh cinemas have inductive loop (or infra red) hearing assistance systems in at least one screen.
- Only three cinemas (one in Dublin and two in Cardiff) have closed caption/audio description systems.
- 14 Irish cinemas and 22 Welsh cinemas have designated parking spaces for wheelchair users.

The range of services and facilities for audiences (and staff) with disabilities varies considerably at the cinemas visited in this study. The best venues had well developed policies (such as UCI's "Plus one" scheme where the disabled person pays for a cinema ticket but their carer can go in for free). They also provide staff training, and have properly adapted facilities including: ramps; lifts; low level ticket and concession counters, ATMs and public phones; inductive loops at the box office and in auditoria; adapted toilets; good visibility signage; and the recently developed audio description/closed caption systems for people with sight or hearing impairment.

On the other hand, some venues offered poor facilities for people with disabilities. One venue visit report noted: "Poor disabled facilities. Wheelchair access up ramp at side of building but ramp very steep and requires access from member of staff. No lift in building. Entrance to building is via flight of steps to box office. Access to first floor bar, café, auditoria and cinema is via at least two sets of stairs. Adapted toilets are provided but there is insufficient room to turn a wheelchair. Inductive loop system installed but not working."

Clearly older cinema buildings present greater difficulties in comparison to a modern building which can have all the desired facilities built in. However, in most instances it is the standard of service from staff which will make the greatest impact on the disabled person. Disability awareness training was cited by only a small number of cinemas, mainly those with national policies or operated by local authorities. This is an area which clearly needs attention in any future exhibition strategy.

4.4 ARCHITECTURAL QUALITY

Modern cinemas and arts buildings need to function flawlessly, delivering a high standard of technical presentation, and be desirable places to visit if they are to attract and hold on to audiences. The international design magazine Frame commented: *"The calling card of the contemporary cinema is the physical image it presents ... Moviegoers want to be immersed in a different world before and after the film ..."* [37]

Multiplex developers have concentrated on efficiency and have perfected the 'in theatre' experience with high quality picture and sound, unobstructed sightlines, large

[35] Diamond cinema in Navan, Ireland and the Odeon multiplex in Bridgend, South Wales

[36] For example, UCI's thefilmworks Manchester, opened Nov 2000, includes a fully equipped seminar room for business meetings and film education sessions

[37] Roderick Hönig, 'Frame' magazine, Jan/Feb 2000

Site and building

screens, comfortable seats, sofas in the foyer, café bars and attractive concession sales areas. Independent cinema developers on the other hand, have emphasised distinctiveness and character while matching or exceeding the technical standards offered by multiplexes.

There is no clearly identifiable trend in external cinema architecture although the major circuits have developed house styles, especially around the entrance areas.

4.4.1 Site visibility and development constraints

The visibility of a cinema is often an important factor in its success. In the first half of the 20th century, cinemas had elaborate frontages and frequently incorporated a tower or similar feature to make the building stand out. Many were as identifiable as churches within their town centres.

The majority of the cinemas surveyed in this study, especially in Ireland, were located on a main street or corner site near the town centre. A notable number of Welsh cinemas were less well located in side or minor streets or on campuses – in both instances being less visible to the general public.

A significant proportion of the cinemas in Ireland, and a smaller number in Wales, had been sub-divided internally or extended on adjacent land to create more screens. The most extensive expansion being the Gaiety in Sligo which was originally a single screen cinema and is now, due to internal redevelopment and expansion on to adjacent land, a modern, attractive 12-screen multiplex.

While visiting each cinema, the potential to extend the cinema building laterally was examined. Two-thirds of these cinemas could not develop further unless they purchased adjacent buildings or land.

Future development and expansion need not be limited by the site footprint and several cinemas had plans to completely redevelop their present site to give a more suitable internal configuration, or in one instance, to add additional floors and screens above the present building if planning permission is granted.

4.5 BUILDING CONDITION

The site visits allowed the researchers to make a broad assessment of the condition of the cinemas. Twenty four cinemas in Ireland and 28 cinemas in Wales were assessed in this manner. A simple, subjective, scoring methodology was utilised where 'excellent' equated to 'as new'; 'average' indicated a 'well maintained' but used venue; 'fair' indicated a building 'in need to redecoration, refurbishment of general tidying up'; and 'poor' reflected a building which was clearly 'substandard' and well-below the expectations of the modern cinemagoer or member of staff.

While the majority of cinemas in both countries achieved 'excellent' or 'average' scores, approximately 30% in both countries were either 'fair' or 'poor'. These lower quality cinema buildings were generally found in small and medium sized towns and in some instances, more surprisingly, in capital cities and popular tourist areas. Several of the poorer condition venues had been subject to twinning or tripling in the 1970s and 1980s but had not received significant improvements since those changes.

Type of site and visibility

	Main street	Side street	Corner	Retail park	Open land	Campus / Park
Ireland	13	2	3	4	2	0
Wales	6	6	3	2	1	3

Table 4.6

Potential to expand the cinema/arts centre footprint

	Expansion possible	Limited expansion	No expansion
Ireland	4	2	14
Wales	6	1	12

Table 4.7

Building condition assessment								
	Ireland				Wales			
	Excellent	Average	Fair	Poor	Excellent	Average	Fair	Poor
General condition	7	10	5	2	6	13	6	3
Entrance & foyer	8	7	7	2	6	11	8	3
Auditorium	6	11	5	2	7	12	6	3
Projection room	5	10	4	2	5	12	4	5

Table 4.8

4.5.1 Planned improvements

Eleven cinemas in Ireland (17%) and 18 in Wales (32%) indicated that they were planning specific improvements to their building. The changes ranged from re-seating the auditorium, improving disability access, and adding facilities such as bars, shops and bowling lanes to a full-scale demolish-and-rebuild project in Cork.

In Ireland, six of the 11 cinemas planning changes were originally built prior to 1985, although three have benefited from major redevelopment in the past ten years. In Wales, 15 of the 18 cinemas planning changes were built prior to 1985, and six of those have been redeveloped during the past decade. At least nine of the 29 cinemas’ proposals to improve their buildings are dependent on the success of future fundraising activities.

4.6 TECHNICAL MATTERS

At the heart of all cinemas are the projection staff and the equipment they operate.

4.6.1 Technical Service

- The major multiplex operators typically employ their own engineers (especially Odeon, UGC and UCI). Ward Anderson owns GFD Communications which provides technical services to many, but not all, of the Ward Anderson group of cinemas as well as to other independent cinemas.
- In Ireland: two companies predominate (servicing 22 cinemas out of 28 who provided data): GFD Communications; and Cinetech (Alan Godden). Western Cinema Services (Ron Cross, based in Warrington) also provides services to a few venues.
- In Wales: four companies predominate (servicing 23 cinemas out of 36 who provided data) with approximately equal shares of the sector: Alan Scott; Omnex (Jed Atherton); Sound Associates; and North Wales Film & Audio Services (Peter Keeley)
- Nine venues in Ireland and eight in Wales cited specific technical improvements they felt their cinema required.
- Ten required sound system upgrades, mainly to stereo-to-digital sound system upgrades although some required mono-to-stereo upgrades.
- Three venues had 'very old equipment' which needed substantial improvements and replacements.
- Two venues had troublesome acoustics which required attention.
- Four venues were anticipating the installation of digital projection in the foreseeable future.

4.6.2 Projection and sound equipment

Cinema projectors last for decades and several cinemas visited during this study are relying heavily on this fact. Some of the older cinemas, even in prime city locations, have archaic machines which are kept running thanks to the skill and ingenuity of the projection staff and technical service engineers.

While the majority of cinemas have good size projection rooms with reasonably well located equipment, a small number of cinemas had unusual locations for their projectors and accompanying challenges for the technical staff. For example, Screen 3 at Llanelli Entertainment Centre which has a projector behind the screen set at right angles to the picture (using three mirrors to get the picture on screen) or the multi-level projection room at the Abbey Centre in Ballyshannon.

Site and building

Many arts centres and multi-use venues share their auditoria with live performance activities (drama, music, lectures, etc) and require screens and loudspeakers to be moved into position for cinema performances. The practical solutions adopted vary from the comparatively standard roll-down screen with loudspeakers wheeled into position, through to curved screens complete with loudspeakers being 'flown in' on rigid steel frames.

Adjustable side and vertical screen masking is present in many cinemas but equally cinemas of all types, from modern multiplexes to arts centres, are operating without any adjustable screen masking.

It was noticeable that several cinemas, especially in Ireland, had arguably taken the 'fourth wall screen' concept too far and had installed screens which were too large for audiences seated towards the front of the auditoria resulting in an uncomfortable viewing experience for people in the front three-four rows.

While 35mm facilities are the norm for all the public cinemas in both counties, the research revealed a number of other technical features:

- Only the Irish Film Institute in Dublin has 70mm projection capabilities.
- In Ireland, the IFI and Triskel Arts Centre (Cork) have 16mm projection facilities.
- In Wales, five venues (including Chapter Arts) have 16mm facilities.
- No cinema in Ireland or Wales has film-quality digital video projection [38] installed (although specialist venues such as the IFI or Chapter Arts and cinemas used for film festivals may have these systems installed on a temporary basis).
- 13 Irish film societies have Data/DVD standard video projection.
- Five Welsh arts centres have Data/DVD standard video projection.
- No public cinema in Ireland operates with a twin-projector/changeover system.
- In Wales, five venues rely on twin-projector/changeover systems and do not have long play systems.
- 21 sites in Ireland (33% of total) and 21 sites in Wales (37%) have digital sound systems in at least one screen.
- Three cinemas in Ireland and one in Wales still use mono sound systems in at least one screen.

4.6.3 Office technology

Although projection, sound and ticket selling has benefited greatly from modern computer technologies, a substantial number of the cinemas visited in both countries lacked modern office technology, including fax machines. The venues making greatest use of office computer systems tend to be modern multiplexes and larger arts centres.

There are many substantial benefits available to cinemas from computer systems, from accounting to programming and especially marketing for specialised films. A wealth of visual and text material is available on-line which can be used in brochures, fliers, and for large scale one-off posters. These resources are particularly effective when used for film festivals, film seasons, and other regular screenings such as Silver Screen senior citizens matinees or Saturday Children's Film Clubs.

Effective use of office computer technology relies on properly trained staff. It is therefore worrying to find that in a survey of over 800 independent exhibitors in the UK [39] the principal training requirement requested by almost 2/3rds of cinemas responding was for computer training (including computerised box office systems).

[38] Film-quality digital projection is defined here as being a system of equivalent or higher standard than the current 3-chip DLP projectors operating at 1.3k, 2k or higher resolutions. Such systems are generally branded 'Digital Cinema'

[39] Independent Cinema Office, London. Questionnaire Report (Draft), December 2003

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5.1 STAFFING

5.1.1 Employment numbers

Based on information supplied by 28 Irish cinemas and 36 Welsh cinemas, the following typical staffing levels can be expected in these types of cinemas. Note that there are substantial variations between individual cinemas according to the complexity of the building and the performance schedule, and the nature of other activities – from café bars to multi-use auditoria – that the venue offers.

In addition to paid staff, 16 cinemas (two in Ireland and 14 in Wales) rely on volunteer staff. In Wales, the average number of volunteers is 14 but the range goes from two up to 50+. For at least 10 of these Welsh venues, the volunteer staff are essential for the economic viability of the venue.

On the basis of the actual staffing data provided during this study and the typical staffing levels shown in Table 5.1 below, an estimate of the total employment in the cinema sectors in both countries can be generated.

5.1.2 Key individuals

Much of the cinema sector, as well as the arts sector, is characterised by over-reliance on key individuals, even within larger venues and organisations. Although this places some cinemas in a vulnerable position, it must also be recognised that these individuals are often an important factor in the success of the cinemas, providing knowledge, commitment, enthusiasm and energy to the cinema. Recurrent issues encountered during the study include the following:

- Recruiting the next generation – It was common to find owner/managers and certain staff members working very long hours. Several projectionists and managers claimed they "can't retire" because they could not recruit anyone with the experience to take over the job.
- Managers – The way a cinema is run makes a considerable and highly visible difference to the perception of the venue, and to its success. While the majority of venues appeared to be well run, a few stood out as exceptionally good, while a small number were clearly in need of better management. Issues

Typical staffing levels

Type of cinema	Full-time staff	Part-time staff
13-17 screen multiplex in capital city	30	53
9-13 screen multiplex in large town	17	25
5-7 screen cinema in medium or large town	10	23
1-3 screen cinema in small or medium town	3	6

Table 5.1

Sector staffing levels

Type of cinema			Ireland			Wales	
Screens	Full-time	Part-time	Volunteer	Full-time	Part-time	Volunteer	
13-17	Actual	70	125	0	74	136	0
	Est	–	–	–	–	–	–
9-12	Actual	45	64	0	33	56	0
	Est	85	125	0	51	75	0
5-7	Actual	80	157	2	31	55	0
	Est	120	276	0	–	–	–
1-4 *	Actual	41	101	2	155	187	153
	Est	62	148	0	63	114	200
Total		**503**	**996**	**4**	**407**	**623**	**353**

Table 5.2

*4-screen cinemas did not provide any employment data and were therefore excluded from Table 5.1 above. The relevant employment numbers have been estimated based on the 1-3 screen cinema data plus 20%.

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such as cleanliness, effective marketing, staff attitudes, and respect for the cinema business, all impact on the individual organisation. Several managers/owners pointed to past problems with previous management.

- Enthusiasm – A large number of highly committed and enthusiastic staff were encountered during the research visits. Most of the people we met were delighted to be able to talk about their business in their own cinema (rather than having to go to Dublin, Cardiff or London).
- Keeping in touch – A number of the owners of independent cinemas, especially in Ireland, made regular trips to Dublin/Cardiff, to London, and to other parts of the UK or even the USA on cinema-related business.

5.1.3 Training

The national circuits (Odeon, UGC, Ward Anderson, etc) and some publicly funded venues (arts centres, local authority venues) provide training for managerial, technical and customer service staff. In a few instances in Wales, the cinema management encouraged staff to pursue a recognised qualification such as the National Vocational Qualification (NVQ) in a relevant subject area. One Welsh arts centre subsidised staff to attend training courses and professional development activities such cinema industry conferences. The national circuits generally operate their own in-house training supplemented by training and procedure manuals for individual cinemas.

The medium and smaller size cinemas tend to rely almost exclusively on 'on the job' training or recruiting staff who have learned their business elsewhere, perhaps in a larger cinema. In general, the smaller venues do not have access to, time for, or budgets for staff training and professional development.

Alongside formal training, most cinemas rely strongly on "passing on knowledge" from more experienced people and from "learning on the job". For example, many cinemas start new employees as ushers, who then graduate up through the box office, concession sales and general cinema management. Technical staff may get a short induction course in a capital city cinema and then be expected to work as a full-time projectionists at a local cinema. Many projection staff claimed that their principal source of in-service training came from the experience of working alongside their service engineers during maintenance and installation visits.

5.2 MARKETING

The overwhelming majority of cinema advertising is commissioned by film distributors. The role of the cinema is, in most instances, limited to promoting the fact that a specific film is showing on particular days and times. However individual cinemas can make a great difference to the success or failure of a film by the way they market and promote this central information. Tables 5.3 and 5.4 detail the ways that the cinemas visited during the survey, carried out this task.

Despite the small number of responses, it is reasonably clear that traditional marketing methods continue to dominate. Trailers (to a captive audience) newspaper advertising (to a local audience), and printed brochures or fliers (to a committed audience) remain the foundation of most cinemas marketing effort. Similarly poster displays remain the dominant form of foyer display. Information boards are more common in Wales, in most instances located within an arts centre. Internet and mobile phone marketing methods are growing in importance but only a relatively small number of cinemas have taken to using email marketing which is cheap, flexible and can be used at short notice to promote special events or boost sales. These techniques are especially effective for specialist and cultural cinema screenings and events which often lack national marketing campaigns. Note that the figures for cinemas 'using web sites' only indicate the number of cinemas who claimed to make active use of a web site. It under-represents the number of cinemas that actually have a web site presence.

Prominent exterior signage and poster displays are essential parts of most cinemas, but a significant

Marketing methods		
	Ireland	Wales
Trailers	21	24
Newspaper advertising	21	23
Printed brochures and fliers	18	23
Local radio	7	7
Regional television	–	1
Teletext	8	8
Email	4	5
Web site (see text)	7	12

Table 5.3

Foyer display methods		
	Ireland	Wales
Posters	24	26
Information notice boards	6	12
Video screens	8	5

Table 5.4

Exterior display methods		
	Ireland	Wales
Illuminated posters	21	8
Non-illuminated posters	5	10
Illuminated sign(s)	18	9
Non-illuminated sign(s)	6	11

Table 5.5

number of the cinemas visited appeared to be almost hiding their entrances from the general public with remarkably little evidence of an active cinema being displayed outside. Illuminated signs and posters were clearly preferred in Ireland, but in Wales, the number of non-illuminated signs predominate – largely the result of restrictions (real or self-imposed) on adding marketing messages to the exterior of historic old buildings or some arts centres.

5.3 TICKET PRICING

The admission price is one of the few areas where longitudinal data is available for a study such as this one. There are however a great number of different pricing schemes, special promotions and concession structures throughout the cinema sectors in both Ireland and Wales. The data presented in Tables 5.6 and 5.7 presents the top ticket price for the cinema week in each category. So for the adult price, the figures shown are the Saturday evening adult price, usually the top price charged during the week. Note that many of the concession prices are not available at weekends, or for main evening screenings.

The range of ticket pricing is substantial, especially in Wales where there is a difference of more than 100% between the lowest ticket price and the highest. The lowest price senior citizen ticket is almost one-third the price of the highest similar ticket.
The prices for special low cost days (often Mondays, Tuesdays or Wednesdays), Childrens' Saturday club matinees, Silver Screen Senior Citizens' matinees, Late

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Cinema ticket prices in Ireland, 2003						
Category		Nº cinemas(64)	High €	Median €	Low €	Concession %
Adult	€	58	8.00	7.00	4.50	100%
	£		5.59	4.89	3.15	
Child	€	44	7.00	4.50	4.00	66%
	£		4.89	3.15	2.80	
Family	€	18	22.00	16.00	16.00	256%
	£		15.38	11.19	11.19	
Senior	€	31	5.25	5.00	4.00	73%
	£		3.67	3.50	2.80	
Unemployed	€	2	7.00	6.45	5.90	87%
	£		4.89	4.51	4.12	
Student	€	33	6.00	5.05	5.00	79%
	£		4.19	3.53	3.50	

Table 5.6

Cinema ticket prices in Wales, 2003						
Category		Nº cinemas(57)	High €	Median €	Low €	Concession %
Adult	€	56	8.30	5.44	3.58	100%
	£		5.80	3.80	2.50	
Child	€	48	6.44	4.19	2.15	71%
	£		4.50	2.93	1.50	
Family	€	4	22.89	18.96	12.87	284%
	£		16.00	13.25	9.00	
Senior	€	37	6.44	4.29	2.15	73%
	£		4.50	3.00	1.50	
Unemployed	€	9	6.29	4.29	3.29	77%
	£		4.40	3.00	2.30	
Student	€	31	6.79	4.29	2.15	78%
	£		4.75	3.00	1.50	

Table 5.7

Night films, and other non-standard screenings are not included in the tables above.

5.3.1 Ticket selling

Almost two-thirds of the cinemas visited during the survey had computerised box office systems, the remainder continuing with traditional Automaticket machines or ticket books. The proportion is similar in both Ireland and Wales. A diverse range of systems are in use with Databox being most popular in Wales and Timms in Ireland.

The range of ticket pricing is substantial, especially in Wales where there is a difference of more than 100% between the lowest ticket price and the highest.

Ticket purchasing over Internet was available from five Irish cinemas and six Welsh cinemas responding to the survey, (approximately 20% of the total venues visited). Automatic ticket dispensers (ATMs) were installed in six Irish cinemas visited.

Computer box office systems in use in cinemas visited							
	CATS	Databox	Eyesight	FilmSTAR	PASS	Ticket.Com	Timms
Ireland	1	0	1	2	0	0	5
Wales	0	9	0	0	1	2	2

Table 5.8

Cinema admissions trends				
	Ireland		Wales	
Trend	Cinemas	Comments	Cinemas	Comments
Rising	20	All sectors, 3 in Dublin	9	5 multi-use venues, 2 multiplexes
Static	8	3 in Dublin, 1 early multiplex, 4 independents	12	8 multi-use venues, 1 multiplex
Declining	1	1 independent	6	Mainly older venues, 4 multi-use, 1 multiplex

Table 5.9

5.4 ANNUAL ADMISSIONS

Based on data from Media Salles, the UK Film Council, and this survey, the average attendance per screen in Ireland in 2001 was 48,604 while in the UK the average for 2002 was 53,990.

In Ireland, 25 out of the 64 (39%) cinemas provided admissions data for this survey. In Wales 36 out of 57 cinemas (63%) provided data. The data supplied covered all types of venues. Chart 5.1 illustrates the attendance levels per screen in bands of 10,000 admissions.

In this sample, eight Irish cinemas and five Welsh cinemas are performing at above their national averages, while 16 Irish cinemas and 25 Welsh cinemas are under-performing on this index.

It is notable that all three admission trends in both countries can be found in cinemas of all sizes, from those with less than 10,000 admissions per year to the very largest multiplexes.

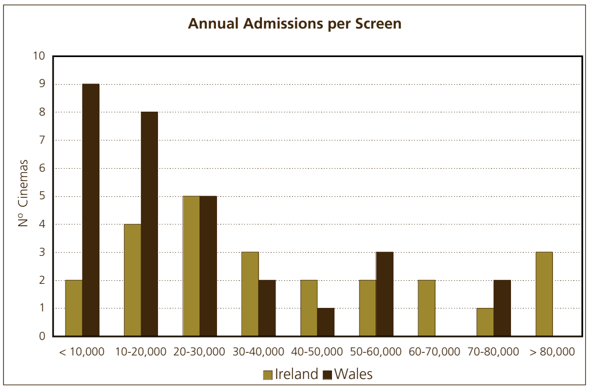


Chart 5.1

5.4.1 Scheduling

It is common for cinemas to add more performances during school holiday periods, and a few venues vary their schedule from summer to winter. For example the three-screen Oscar Cinema in Newbridge averages 9-10 performances per week during winter months, but presents 24-25 performances per week during summer months and during the Christmas holidays.

Programme

6.1 PROGRAMME STYLE

The programming style of each cinema was categorised according to the type of films which were shown regularly. In other words, the cinema must be generally recognised by the cinemagoing public as venue where certain types of films are likely to be shown. This approach is particularly relevant for cultural films because in addition to the venues which operate full-time specialist programmes, there are a number of venues in both countries, from arts centres to multiplexes, which regularly supplement their commercial programmes with occasional cultural and specialist titles.

It is clear from Table 6.1 that the majority of Irish cinemas have a predominantly commercial programming style showing new titles on date of release, whereas in Wales there is more variety in programming style. This reflects the nature of the cinema sector in both countries – Ireland dominated by major and minor commercial circuits while Wales has a more mixed cinema ecology.

6.1.1 Film booking

The effectiveness of a central booking service – a head office or an agent – compared to the local knowledge of cinema managers has long been a popular subject for debate within the cinema sector. The survey indicates that, especially in Wales, local managers are responsible for bookings. This can be explained by the relative lack of circuit cinemas and the large number of independent cinemas and arts centres. The finding also correlates with the significant number of Welsh cinemas screening commercial films 'off date', that is several weeks after their initial release.

6.1.2 Film distribution

Film distribution in the UK and the Republic of Ireland is dominated by six major companies who, in 2002, between them account for 89.9% of the market measured by gross box office takings. The next nine distributors account for a further 8.9% of the market. Lastly, 39 small companies, some only releasing a single film, account for the remaining 1.2%.[40]

The 'big six' each average a release once a fortnight, 167 films out of the 420 released in 2002. Acknowledging that only a small number of these films dominate the box office charts, the average box office earnings per release in the UK and Ireland for these 167 films was £4.4 million. Again, in contrast, the average earnings per release for the lower half of the distributor table was just £163,000.

The two most contentious issues between cinema exhibitors and film distributors concern firstly the availability of prints at the time of the release, and secondly, the terms on which the film is made available - the rental. Both of these issues were regularly highlighted during the research period of this study.

Programme style	Ireland (64 venues)	Wales (57 venues)
Commercial (on-date)	59	34
Commercial (off-date)	11	32
Cultural / Specialist	4	16

Table 6.1

Film booking	Ireland	Wales
Head office	13	8
Local cinema manager	16	25
Specialist film booking agent	1	7
N° cinemas responding	30	40

Table 6.2

[40] Data from 'Film in the UK 2002 Statistical Yearbook', UK Film Council

However it is relevant to note that the average film rental percentage in the UK and Ireland (typically around 37% to 41%, varying throughout the year) is among the lowest in the cinema world.

Low average film rentals have been increasingly countered by distributors imposing 'special terms' for films which are expected to have exceptional box office potential. While these terms can benefit major distributors they generally cannot be imposed by smaller, independent distributors who remain with the low standard terms. This is a particularly relevant issue for distributors – large and small – who wish to distribute films with a specifically Irish or Welsh connection and which, in most circumstances, are not subject to 'special terms'.

6.2 EXTENDING THE PROGRAMME

One of the key areas in the research brief relates to quality and quantity of programming and broadening programme choice. The survey included analysis of programme style and particularly the provision for specialist or cultural film within the cinema programme. Table 6.3 below shows the distribution of cinemas surveyed which regularly programme cultural or specialist films.

This analysis shows the low proportion of cultural or specialised programming, particularly in Ireland where approximately 1-in-10 cinemas screened specialist films – and this may only be on an occasional basis. The two traditional sites listed are the Irish Film Institute and Kino in Cork.

In Wales the proportion is higher, particularly among the arts centre and theatre sites. Of the 57 cinemas in Wales, 15 indicated that they included specialised or cultural films within the programme. A high proportion of these are arts centre/theatre venues and again, reinforce the importance of this grouping to the cinema sector in Wales.

The number of cinemas including some specialised or foreign language film within their overall programme, though on an occasional basis, is higher for both countries. See Table 6.4 below.

It would appear that public funding, particularly for arts centres in Wales and for the 'access CINEMA' network in

Cultural programming						
	Multiplexes		Traditional		Arts Centres/Theatres	
	Nº venues	Nº cultural	Nº venues	Nº cultural	Nº venues	Nº cultural
Ireland	25	1	36	4	3	1
Wales	11	0	16	1	30	14

Table 6.3

Specialist programming			
	Yes	No	Nº Responses
Ireland			
Interreg	9	5	14
Other	8	6	14
Total	17	11	28
Wales			
Interreg	10	7	17
Other	11	10	21
Total	21	17	38
Total	**38**	**28**	**66**

Table 6.4

Programme

Ireland, has resulted in an expansion of programme choice and provision of cultural and specialised programming. It has also resulted in a wider choice of films for smaller communities either through bringing a cinema programme to areas without a full time cinema or through offering a specialist programme choice.

6.3 MOBILE CINEMAS

Mobile cinemas with 35mm projection, Dolby stereo sound, and comfortable seats have become relatively popular since the French manufacturer Toutenkamion demonstrated their specially adapted vehicle in the mid-1990s. These mobile cinemas offer a proper 100-seat, 35mm, stereo sound experience closely comparable to a fixed site cinema. There will soon be five travelling cinemas (cinemobiles) operating in the UK and Ireland: two in Ireland, one in Scotland with a second ordered, and one due in 2004 in the south west of England. To date, no similar facility has been proposed for use in rural Wales.

6.3.1 Cinemobile

Fis Na Milaoise Teo is a wholly owned subsidiary of the Irish Film Institute and is responsible for operating the Cinemobile based in Galway. The vehicle was purchased with funding from the National Millennium Committee. Revenue support is received from the Irish Film Board, the Arts Council, the Northern Ireland Film & Television Commission, and state broadcaster, RTÉ.

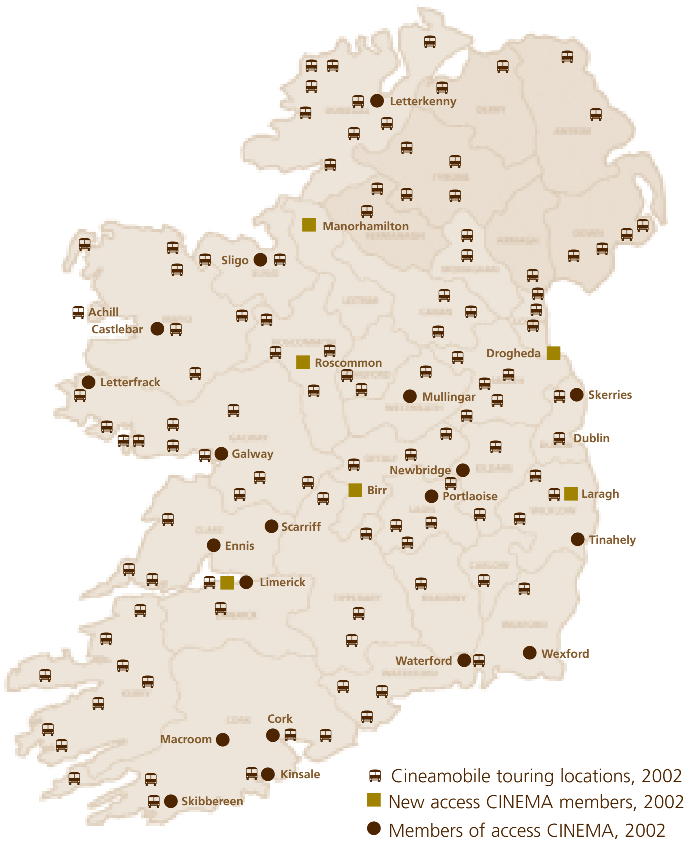
This Cinemobile travels around most of Ireland including Northern Ireland. In the initial two-year period, seven full circuits of the country have been completed with approximately 100 locations in the tour. Over 120 different titles have been screened during these tours.

Over 40,000 attendances have been achieved for regular screenings plus a further 15,000 who attended the Cinemobile via festivals and other special events. The programme has included Irish films with major arthouse and mainstream titles. Education and young people's screenings account for over two-thirds of the audience, although efforts are now being made to further develop the adult audience.

Cinemobile's main aim is to bring professional quality cinema to communities which do not have easy access to a fixed site cinema. The cinema is fully wheelchair accessible, but does not yet have facilities for people with hearing or sight impairment.

The cinemobile is operated by two driver-projectionists who received training at the Ennis Omniplex. They operate a one-week-on / one-week-off rota and do not screen films on Sundays.

The challenges of touring a cinema around rural Ireland have included losing sections of roofing in high winds (a problem now solved) and developing good local contacts to assist with the marketing. The appointment of a full-time audience development officer who works with each community in advance of screenings has resulted in considerable improvements to the service.



Map 6.1 Map reproduced with permission from the Arts Council Annual Review 2002

6.3.2 Aisling Gheal Liatroma

Under the Local Government Centenary Community Initiative Awards Scheme, Leitrim County Council purchased and operates a second cinemobile. It provide a venue for poetry readings, one-person shows, public consultation meetings, business presentations and small exhibitions, in addition to its main cinema screening role. A film society has been established in Manorhamilton as a result of the cinemobile and further societies are expected to be established in the near future.
Special efforts have been made with the cinemobile to ensure wide access to screenings, especially for the disabled or disadvantaged.

6.4 FILM SOCIETIES

An important part of the cinema sector within both countries consists of film societies and film clubs. This sector encompasses societies with weekly or fortnightly screenings on 35mm, often in arts centres but occasionally in a local cinema (and in one instance in a mobile cinema), through to once a month screenings on DVD video.

In Ireland, film societies provide access to foreign language and specialised product where this is not otherwise available. This is coordinated through the 'access CINEMA' network. The network, supported by the Arts Council, provides advice, support and a booking service to a number of film societies in Ireland. It supports innovative regional cinema programming across a number of venues including arts centres, theatres and in one case, a local yacht club. Members screen on 35mm and DVD. They bring titles to local audiences, both Irish and international that would otherwise not be seen by regional audiences.

A small team of experienced staff at 'access CINEMA' assist member groups by providing appropriate advice to local programmers on film selection as well as technical information on projection and presentation standards. They maintain contacts with distributors, block book and ship films and supply promotional material, all of which provides a framework that allows local communities to present strong (and ongoing) regional cultural cinema exhibition. The network makes a valuable contribution to local communities and plays an important role in enhancing cultural and specialised cinema exhibition.
In Wales, the British Federation of Film Societies (Welsh Group), a voluntary national body partly funded by Sgrîn, represents the interests of film societies. It works with national bodies, local arts boards, the film industry and government to support film societies. It publishes a quarterly magazine and organises national viewing sessions where society programmers can see newly available films.

Additionally, a number of film societies, in both countries, provide a local cultural service by simply providing film screenings to their local community. This local amenity approach normally involves more mainstream film titles and the performances can occasionally attract large audiences.

Film Societies

Country	Region	Nº Socs	Nº on 35mm	Nº on DVD	Nº Screening in Arts Centres
Ireland	Interreg	10	4	6	9
	Other	15	8	7	8
	Total	25	12	13	17
Wales	Interreg	6			
	Other	9			
	Total	15			
	Overall total	**40**			

Table 6.5

Programme

6.5 FILM FESTIVALS

Film festivals in both Ireland and Wales play a key role in expanding and extending the diversity of programme choice available to audiences and in widening the debate about film culture in both countries. The network and reach of festivals is more extensive in Ireland than in Wales at present, and includes a broader range of venues.

The film festivals in both Dublin and Cardiff have undergone financial restructuring recently and, partly as a result, the current festivals are in the early stages of development. The November 2003 Cardiff Screen Festival was the first under its current director, and the Jameson Dublin International Film Festival in February 2004 was only the second occasion this newly formed festival has taken place. In both instances, the new festivals appear healthy and well supported. However, the festivals detailed below do not as yet benefit from a co-ordinated policy or funding framework within which to develop in a collaborative and secure manner, though some are funded by the Arts Council, Sgrîn, and other partners.

The authors of Developing Cultural Cinema in Ireland point out that "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 activity". [41] This is undoubtedly true, and care must be taken to avoid unnecessary duplication of effort, dilution of resources, and clashing schedules. But it is equally true that many film-makers and distributors are obliged to use film festivals as the main showcase and launch-pad for their work. Speakers at the 2003 Rotterdam Film Festival's 'Film Parliament' declared that there were "no safe oases for visionary cinema" and that "film festival circuits have become an alternative to real releases" [42] The evidence of the festivals detailed below, such as the Wales One World Film Festival, supports this view.

6.5.1 Cork International Film Festival

The Cork International Film Festival is Ireland's oldest cultural film event. It was established in 1956 to bring to Irish audiences the best of international cinema and to serve as a platform for new Irish cinema. The published objective of the festival is "to celebrate the art of film in all its forms." The festival describes its artistic approach as eclectic. It aims to present a wide spectrum of contemporary filmmaking including feature films, documentaries, animation, short films, experimental and student work. It makes a particular focus of short film and is committed to developing an education programme though the establishment of UnReel, a stand-alone festival for young audiences. The festival screens at the Cork Opera House, the Triskel Arts Centre, Kino Cinema and the Gate Cinema, as well as in cafés and other venues in the city.

6.5.2 Jameson Dublin International Film Festival

The Jameson Dublin International Film Festival runs for 11 days and screens at all four city centre cinema complexes. It seeks to bring the best of world cinema to

Film Festivals in Ireland and Wales	
Ireland	Cork International Film Festival
	Jameson Dublin International Film Festival
	Galway Film Fleadh
	Kerry Film Festival
	Fresh Film Festival (Limerick)
	Darklight Film Festival Dublin
	Dublin Lesbian and Gay Film Festival
Wales	Cardiff Screen Festival
	Ffresh Student Moving Image Festival of Wales (Aberystwyth)
	Wales One World Film Festival (Touring)

Table 6.6

[41] Developing Cultural Cinema in Ireland, by N. Connolly & M. Dillion, Arts Council
[42] Reported in Screen Daily, 27 Jan 2002

Dublin as well as showcase work made in Ireland or by Irish producers and directors working abroad. Special themes such as a focus on national cinema and tributes to particular filmmakers are included, along with a series of lunchtime forums on topics such as film distribution, casting and writing.

The stated philosophy of the festival is "to transcend the experience that is just another day or night out at the movies". The key to achieving this being "to bring as many filmmakers and actors as we can attract to the event, to introduce their screenings and to participate in lively post-screening discussion with the audience".[43]

6.5.3 Galway Film Fleadh

The Galway Film Fleadh is a six day event held annually in July. It is very much a filmmaker's festival and attracts a wide range of actors, directors and filmmakers. Screening mainly at the Galway Town Hall Theatre, its programme is based around a mix of world and Irish cinema. The 15th Galway Film Fleadh included over 70 feature films, 100 shorts plus various documentaries, animations, seminars, debates and discussions. The festival incorporates the Fleadh Fair, Ireland's only film market.

6.5.4 Kerry Film Festival

The Kerry Film Festival is a short film festival whose aim is to promote the work of young film makers. Now in its 5th year, the festival takes place in October throughout the county of Kerry. The extensive range of festival venues include KDYS Killarney, the Great Blasket Centre, Dun Chaoin, The Phoenix Cinema in Dingle, Kerry Omniplex, The Classic Cinema in Listowel, St John's Arts Centre, Listowel, Siamsa Tire, Tralee and within the Cinemobile touring cinema. The festival also features a scriptwriting competition in association with Cork Film Centre.

6.5.5 Fresh Film Festival (Limerick)

The Fresh Film Festival, now in its sixth year, seeks to encourage active film-making by young people and to provide a show case for their efforts through the Irish Schools Video Competition. It is aimed at the 12-to-18 years age group and takes place in Limerick each Spring. The Festival aims to create a greater awareness and understanding of film and video culture among young people in Ireland and seeks to offer technical training in areas of film-making that can be replicated in a classroom situation or by the individual.

6.5.6 Other film festivals in Ireland

Other festival listings for Ireland include: the Darklight Digital Festival at the Digital Hub, Dublin; the Dublin Lesbian and Gay Film Festival; and the recently established Clones Film Festival in Monaghan. The Irish Film Institute presents a number of specialist film festivals such as 'Stranger than Fiction' and 'CineFrance' alongside its main programme.

In addition, a number of mixed arts festivals are funded and supported by the Arts Council. Some of these include a film element and it is likely that more will be encouraged to include film as part of their future programmes. This could provide an important axis for the development of cultural programming across a wider area.

6.5.7 Cardiff Screen Festival

The Cardiff Screen Festival provides a platform for work from around the world, as well as being an important focus for new Welsh audiovisual and cinematographic works both in the English and Welsh languages. Originally this non-competitive festival was based in Aberystwyth. It then transferred to Cardiff and was eventually taken under Sgrîn's wing in 2003.

There are a series of industry events based around current topics such as interactive media, Welsh language film and television production, the impact of new licensing laws, and film education practices.

6.5.8 Wales One World Film Festival

Wales One World focuses on cinema from a wide range of world cultures as well as Welsh film. The 2004 festival will tour 14 foreign language films to ten arts centres or mixed arts venues – Aberystwyth Arts Centre, Chapter Arts (Cardiff), Theatr Clwyd (Mold), St Donats Arts

[43] Festival Director Michael Dwyer introducing the 2nd Jameson Dublin International Film Festival, www.dubliniff.com

Centre, Wyeside Arts Centre, The Courtyard (Hereford), Taliesin Institute (Swansea), Theatr Mwldan (Cardigan), Ludlow Assembly Rooms, and Pontasdawe Arts Centre – two of which lie just beyond the Welsh border.

The festival runs a daytime programme of film education activities for local schools and colleges and aims to give young people in Wales an opportunity to develop a greater understanding of people from other countries and the richness and diversity of their cultures.

6.5.9 Ffresh Student Moving Image Festival of Wales (Aberystwyth)

Described as the Student Moving Image Festival of Wales, the Ffresh Festival seeks to celebrate achievement and offer encouragement to the rising stars of the moving image industry currently studying in Wales. It is a two day event in October, based at the Aberystwyth Arts Centre.

6.6 IRISH AND WELSH PROGRAMMING

As part of the survey, venues were asked to indicate if they showed Welsh or Irish films as part of their regular programme. Included within this definition were films which by virtue of their subject matter or their production staff and finance, are predominantly Irish or Welsh films. This included Gaelic and Welsh language films. Table 6.7 shows the results of this analysis.

The interviews and venue visits demonstrated a clear enthusiasm for Welsh or Irish films when they are on national release and therefore supported by distributor print and advertising funds. They also demonstrated an enthusiasm for Welsh language films when they are available, although number of interviewees commented on the lack of Welsh language product. Short films identified as Welsh or Irish were generally well received by cinemas in both countries.

6.6.1 Wales Cinema Day

Each year in February or March, Sgrîn organises a single day, country-wide festival of cinema when "when you will get that little bit extra out of your usual cinema-going experience". All types of cinema throughout Wales can participate. Special events presented include:

- Previews of feature films
- Guests attending screenings, Q&A sessions
- Screenings of films located in Wales
- School workshops and screenings
- Archive screenings and unique events
- An all-Wales Quiz to find the best film brains in Wales

6.7 EDUCATION AND PROGRAMME ENHANCEMENT

- A number of venues offer a programme of schools screenings but in Ireland, outside work with the Irish Film Institute and festivals, formal and informal education work is limited.
- A number of venues in both Ireland and Wales expressed an interest in and market for developing education work but are limited by lack of funding and resources such as specialist staff and education/teaching space.

Irish or Welsh programming	Yes	No	Nº Responses
Ireland			
Interreg	13	0	13
Other	8	0	8
Total	**21**	**0**	**21**
Wales			
Interreg	12	2	14
Other	3	4	7
Total	**15**	**6**	**21**
Total	**36**	**6**	**42**

Table 6.7

Programme enhancement	Formal Education	Informal Education	Schools Activities	Outreach
Ireland				
Interreg	5	2	12	0
Other	5	1	11	0
Total	*10*	*3*	*23*	*0*
Wales				
Interreg	7	2	16	0
Other	4	1	16	2
Total	11	3	32	2
Total	***21***	***6***	***55***	***2***
Nº venues replying	36	25	61	27

Table 6.7

- In Wales, the majority of education work appears to be developed at the arts centre venues, but this work is dependent on project funding.

6.7.1 Irish Film Institute Education

IFI Education is the Education Department of the Irish Film Institute. Its work covers several categories:

- Screenings of films in an educational context, workshops, educational materials, school visits and teacher training programmes. IFI schools activities involve collaborations with the Cinemobile, Cork UnReel Festival, the Junior Galway Film Fleadh and Cinemagic in Belfast.
- Evening courses open to the general public as well as courses and events designed specifically for specialised interest groups. Typical courses run for seven weeks and involve screenings in Cinemas 1 or 2 followed by talks and discussions in the IFI Meeting Room.
- An outreach programme, offered throughout Ireland, providing community groups, and the socially excluded, the opportunity to write, direct, shoot, and edit their own film projects. Current projects include work with groups in Ballymun, Clontarf, and Athlone.

IFI Education publishes a range of study packs, newsletters, and course materials which constitute a valuable resource for other cinemas and for the education sector in general.

6.7.2 Media Education Wales and Valley Arts Marketing

Media Education Wales is a non-profit limited company which receives revenue funding from Sgrîn. It supports media and moving image education in Wales through resources, training, events, projects, research and consultancy. Its activities are delivered in Welsh and English.

Projects include: the development of a CD-ROM on the understanding and use of film language; film workshops at the Cardiff Screen Festival; INSET teacher training; film editing for young people; and a range of courses held during summer holidays.

Alongside Media Education Wales, Valley Arts Marketing (VAM) offers programming and education services to a number of cinemas and arts centres in South Wales including cinemas in education to: Aberdare Coliseum, Blackwood Miners Institute, Parc & Dare Theatre, and Muni Arts Centre in Pontypridd. VAM also delivers education events during the Wales One World Film Festival.

Programme

6.8 CULTURAL IMPORTANCE OF THE CINEMAS

There are broadly four roles occupied by the cinemas visited:

- Capital city cinemagoing. This category includes major 'destination' multiplexes such as the UGC Dublin or the Ster Century Cardiff, prominent traditional cinemas such as the Savoy in Dublin, and key full-time cultural cinemas such as the Irish Film Institute in Dublin and Chapter Arts in Cardiff. Collectively, these cinemas provide access to the broadest range of new, international, and specialist programming in both Ireland and Wales.
- A regional hub for mainstream cinemagoing, typically a large multiplex. In several instances these cinemas are important 'anchors' for retail developments, for example the Odeon at Bridgend in South Wales, the Ster Century at Liffey Valley outside Dublin, or the Omniplex in Galway. These cinemas attract audiences from a wide catchment area who may be combining cinemagoing with other activities such as eating out or shopping.
- A local cultural and entertainment facility in medium and small size towns, often a long-established venue but also including several important new cinemas. Minor circuits and independent commercial operators predominate in this category although many of the Welsh arts centres and multi-use venues are also included. Audiences tend to be local and in several instances, the cinema is the only entertainment facility in the town.
- A venue for cultural and specialist cinema (sometimes in conjunction with other resources such as live theatre and music, or specialist film resources). This group includes a small number of specialist, full-time cultural cinemas (all located in the major cities) as well as a number of the arts centres in both countries. Several of these venues host or organise film festivals.

A total of 21 public cinemas in Ireland and Wales indicated that they regularly present specialist or cultural cinema programmes. The majority of these venues are arts centres, supplemented by a few notable major multiplexes, but in most instances the cultural programme runs alongside the predominant commercial programme. Three cinemas do operate full-time cultural programmes: the Irish Film Institute, the Kino in Cork, and Chapter Arts in Cardiff.

6.8.1 Irish Film Institute, Dublin

The IFI is the national body charged with the promotion of film culture. It owns and operates the cinemas in Temple Bar, Dublin as well as housing the Irish Film Archive, a film library, an education and outreach department, a specialist bookshop, and a bar and café. A wholly owned subsidiary of the IFI is responsible for operating the Galway-based Cinemobile. The IFI receives funding from the Arts Council and Europa Cinemas.

The two cinemas, seating 260 and 118 respectively, are housed in a converted 200 year old Quaker Meeting House. The conversion to the IFI in 1992, won awards for innovative architecture, especially in the central atrium foyer and café area. The IFI has investigated the possibility of expanding its activities into an additional nearby building but has not yet reached agreement on how this development should proceed.

The IFI is open to the public, but a members' scheme operates for films which have not been classified by the Film Censor. The IFI presents a wide range of films in its main programme supplemented by tours, film festivals and special events. The bi-monthly programme booklet is an important reference document for keen cinemagoers in the capital.

6.8.2 Kino Cinema, Cork

The Kino was established in 1996, and describes itself as the only independent arthouse cinema in Ireland. It is located on Washington Street in a redevelopment area within Cork city centre. The Kino currently has one screen, with a capacity of 188 seats. It was in receipt of capital funding in the first phase of the Arts Council/Irish Film Board's capital funding scheme - the Cultural Cinema Consortium and plans to redevelop a three screen cinema on its present site. Described as 'an arthouse for the 21st century', this will include digital capacity, and add a café/bar, digital lounge, a rooftop garden and enhanced education resources. It will act as a cultural hub linked with nearby art, educational and entertainment centres within the city centre. Work is due to start on site in 2004.

Kino's objective is to bring the best of contemporary world cinema to the film-going public of Cork and its region. In addition to current releases of high quality English language and foreign films, Kino also has a variety of other screening events. These include special one-off events, mini-seasons and film weeks. Kino also plays a significant role in the annual Cork International Film Festival each October, in which it is one of the main three film exhibition venues, attracting film-makers and audiences from all over the world.

6.8.3 Chapter Arts, Cardiff

Chapter is a multi-arts centre situated in a residential suburb to the west of Cardiff city centre. It receives revenue funding from Sgrîn, the Arts Council of Wales, Europa Cinemas and Cardiff County Council.

Prior to the establishment of the UK Film Council, revenue funding for regional film theatres in England and Wales was handled by the British Film Institute. When the BFI delegated funding responsibilities for cinema exhibition to the English Regional Screen Agencies, the funding responsibility for Chapter Arts – which had been a funded regional film theatre – transferred to Sgrîn.

The venue was created in 1971 when the former school was adapted to a cultural venue. The larger of the two cinemas, seating 191, was purpose built in 1987. In addition to the two cinemas, there is a theatre studio, gallery spaces, a specialist shop, workshop spaces, and a café bar. Chapter works with several film-related organisations such as Media Education Wales and animation group, Kinetic.

The programme is predominantly specialist along with a number of critically acclaimed mainstream releases.

Chapter is the base for the Cardiff Screen Festival. A membership scheme is available, but the cinemas are open to the general public. An innovative loyalty card scheme (CL1C Card) allows audiences to accumulate redeemable points in much the same manner as supermarket loyalty schemes.

Chapter is limited as a cinema by its suburban, side street location which is away from the main entertainment, leisure and cultural areas of the city. Audience surveys indicate that less than 15% of the audience is under 25 years old, but 40% is aged 25-44 years old. Both cinemas are showing their age, a situation which is increasingly apparent to cinemagoers who visit one of the new city-based multiplexes. Nevertheless, despite its location and the age of some facilities, Chapter remains the main cultural cinema in Wales and an important centre for contemporary culture from Wales and from around the World.

SWOT & impacts

7.1 STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

All the venues visited were invited to detail their strengths and weakness as well as to comment on what their perceived to be opportunities and threats. The issues they identified are summarised below:

	Strengths	Weaknesses
Programme	Quality of programme	Poor access to new national releases
	Up-to-date releases	Infrequent ‘on-date’ programming
	Diversity and flexibility	Inadequate funds for marketing
	Targeted marketing activity	Low level of attendance by 18-26 year olds
	Cross-over between different artforms	
	in the building	
Building	Location	Poor or inaccessible location (e.g. on campus
	Landmark / modern building	and cut off from town)
	Distinctive / stylish building	Out-of-date, elderly building
	Character	Can’t expand or adapt building
	Modern, high-quality venue	Not enough screens
	Comfort	Lack of free, safe, nearby parking
	Cleanliness	Lack of lounge areas for customers to sit,
	Good layout	wait, relax
	Accessible	
Facilities	High technical standards	Poor disabled access facilities, especially
	Large screens	lack of lifts
	High quality digital sound	Poor position of wheelchair spaces
	Café bar	Out-of-date sound systems
	Kids party room	Out-of-date/worn seating
Staff	Friendly staff	Too few staff
	Customer care	Difficulties attracting/retaining staff
	Family run business	History of poor management
	Knowledge of local audience	Community involvement decreasing
	Collective effort of volunteers	
Operations	Reliable	Small catchment population
	Key local resource / focal point for	History of financial problems
	local community	Can’t get a bar licence
	Value for money	Lack of viable daytime uses
	Sense of local ownership	Poor relationship with local authority
	“Still operating!”	Competition from new multiplexes
		Inadequate public funding
		Reliance on public funding
		Burden of legislation

Table 7.1

7.2 IMPACTS MADE BY THE CINEMA

By far the most important impact cited by cinemas surveyed was the provision of entertainment, leisure and culture for local residents, especially for children and young people. The local cinema was also important for people who were not able to, or did not want to, travel several miles to another cinema. Many respondents pointed out that the cinema was the only entertainment facility in the town and was vitally important to the local community. A number of respondents emphasised the role played by the cinema in the town centre, retail area, or range of cultural provision. Other impact factors included:

- Provision of access to a broad range of international films,
- Development and promotion of film culture,
- Local employment and community involvement,
- Affordable and accessible entertainment,
- Keeping cinema on the local authority agenda,
- Involvement with local schools and colleges.

7.2.1 Impacts on the cinema

Competitive cinema developments and changes in the town were cited as having made the greatest impact on cinemas. Developments as varied as a large scale regeneration of docklands in Cardiff, making the area fashionable, a new housing development bringing in a new young population, or the construction of a new retail centre near the cinema were all identified by respondents. Other factors which had an appreciable impact on cinemas included:

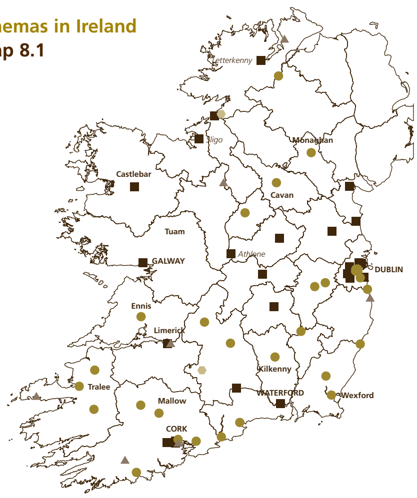
- The relationship with distributors and the effect of being left out of national advertising campaign,s
- The appointment of a committed local authority theatres manager, and the transfer of a local authority venue, to a more appropriate and knowledgable department
- The continuing effects of previous financial crises on a currently stable operation,
- Welsh devolution resulting in local issues such as cinema provision getting greater attention,
- The partnership between a small arts centre and a large new multiplex.

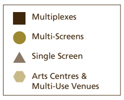
	Opportunities	Threats
Buildings & facilities	New development on a new site	New competitors
	Cultural Cinema Consortium funding to	Over-screening
	develop a new building	Risk of redevelopment not happening
	New venues to add to existing operation	Impact of Disability Discrimination legislation
	Digital cinema	Town centre deteriorating
Operations &	Located in an area of fast population	Increasing competition for specialist titles
programme	growth and/or regeneration activity	At the mercy of the quality of new releases
	New programming agent	Increasing competition from not-for-profit
	More screenings / expanded programme	cinemas/arts centres
	Introduction of film education activities	Perceived lack of a 'level playing field' in
	Additional staff to develop and promote	respect of access to public funding
	the redeveloped venue	Lack of local authority support

Table 7.2

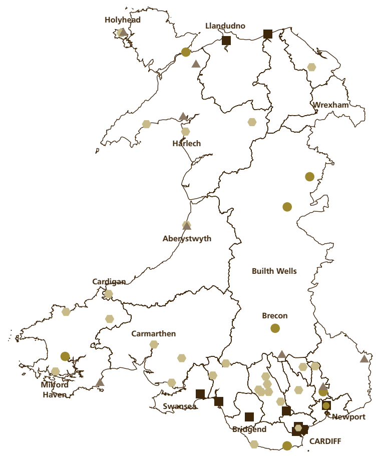
Gaps in provision

Cinemas in Ireland
Map 8.1





Cinemas in Wales
Map 8.2



8.1 ACCESS TO PUBLIC CINEMA

Based on the research survey at the end of 2003 (cf. pg 18), the full range of cinema provision in Ireland and Wales is shown in Maps 8.1 and 8.2.

It is evident from Map 8.2 that there is a significant imbalance in cinema provision across Wales. Modern commercial cinemas are concentrated along the northern and southern belts or coastal regions. There are a few predominantly traditional or older cinemas along the Welsh/English border to the east. Most notable, however, is the sparse provision across the whole of mid-Wales.

If this is compared to Illustration 3.1 (pg.38) from the Wales Spatial Plan showing population density, we can see that cinema provision largely reflects existing population density, especially in respect of multiplex provision. It is evident from the maps, that sections of the Welsh population, especially in mid-Wales and north Wales, do not have access to contemporary cinema provision within a 40-minute drive time.
The Irish cinema map in Map 8.1 illustrates a more even spread of cinema exhibition provision across the country, although as noted earlier, the greater Dublin area has a considerable concentration of cinemas. Provision is more sparse in the north west from Galway upwards. Outside the main population areas, cinemas tend to be traditional multi screen or single screen sites. There is a comparatively even spread of multiplex developments across the country. It is clear, however, that in some areas, drive-times to cinemas will be lengthy.

8.2 ACCESS TO MODERN STANDARD CINEMA

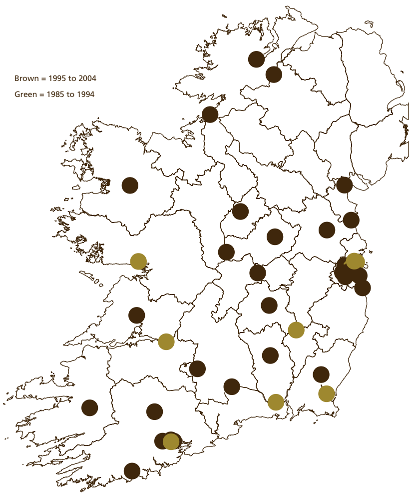
8.2.1 Recently constructed cinemas

Maps 8.3 and 8.4 highlight purpose built multiplexes and cinemas which opened in the decades 1985-1994 and 1995-2004. These cinemas, represent the two most recent generations of cinema design.

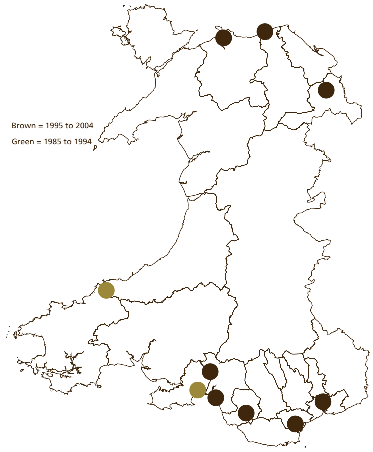
8.2.2 Multiplex provision

Map 8.6 indicates that multiplex provision in Wales is very limited and confined to the northern and southern coastal strips with a strong concentration around Cardiff, Newport and Swansea. Other cinemas which have recently been refurbished or built after 1995 and offer audiences the latest cinema standards, include Theatre Mwldan, Wyeside Arts Centre, Builth Wells and to some extent, Aberyswyth Arts Centre and the Commodore Cinema Aberyswyth. This still leaves a number of older or traditional single or multi screen cinemas sites which are maintained to a high standard, and are an important part of the cinema infrastructure in Wales.

Recently built cinemas in Ireland
Map 8.3



Recently built cinemas in Wales
Map 8.4



Multiplex provision in Ireland is more evenly spread as can be seen in Map 8.5. A number of sites, both multiplex and multi screen, have been developed since 1995. A number of independent, non circuit, multiplexes have been developed in Ireland, including the Gate Cinema in Cork which has been recognised as an award winning site by the Royal Institute of Architects of Ireland.

8.3 CULTURAL PROVISION

Given the comparatively uneven distribution of cinemas within Wales, access to cultural cinema provision is actually quite good. Map 8.8 shows the number of sites where access to a cultural cinema programme is available, outside of film society provision. What is clear, however, is the importance of arts centres and multipurpose sites for specialist and cultural cinemagoing.

In contrast, the physical infrastructure for cultural cinema in Ireland (Map 8.7) is currently weak. At present, the only dedicated cultural cinemas in Ireland are the Irish Film Institute in Dublin and the Kino in Cork. This is being addressed through the cultural Cinema Consortium funding from the Arts Council and the Irish Film Board and is expected to result in the development of a cultural cinema in Limerick and the re-development of the Kino in Cork. A further round of funding in 2004 is anticipated to result in additional new developments.

The importance of arts centres and the overlap with the film society/'access CINEMA' networks, in expanding cultural provision, is evident in Maps 8.9 to 8.12 overleaf.

8.4 Mobile cinema and festivals

A final element in the provision of cinema and particularly, cultural cinema, is the mobile cinema network and the film festival network. On page 54, the extensive touring of the Cinemobile is detailed and map 6.1 clearly illustrates the considerable number of communities who have benefited from this service.

8.5 CINEMA PROVISION SUMMARY

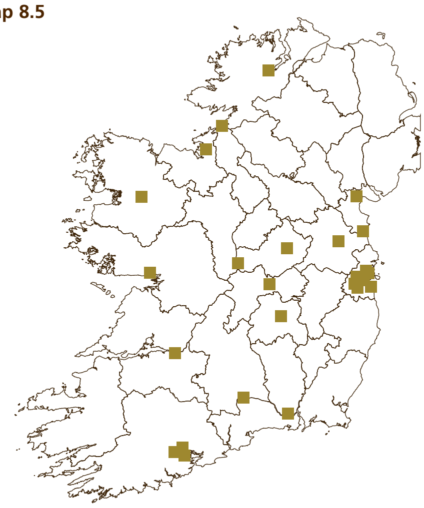
8.5.1 Ireland

Ireland has a relatively well developed, recently built, cinema sector but a poorly developed cultural cinema network. (Although additional cultural cinema provision is provided by film societies and film festivals).

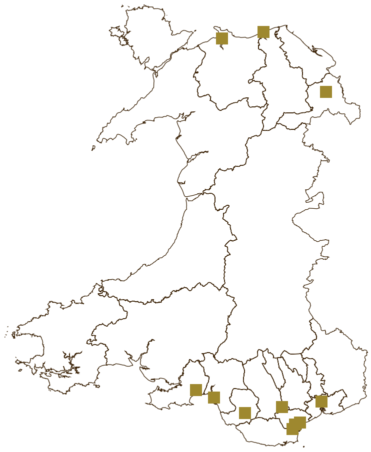
A number of the key gaps in provision for cultural cinema were highlighted in the Arts Council's Developing Cultural Cinema in Ireland study which are further endorsed by this research. Some of these gaps are being addressed through the Cultural Cinema Consortium funding programme.

In Ireland, in addition to developing new sites, emphasis

Multiplexes in Ireland
Map 8.5



Multiplexes in Wales
Map 8.6



should continue to be placed on developing the arts centres and film societies, perhaps along lines of the Welsh model within which, there is a relatively extended cultural programme.

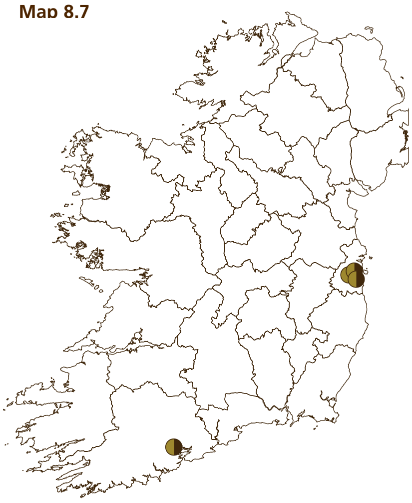
8.5.2 Wales

Outside the Northern and Southern coastal areas in Wales, there is a lack of modern standard commercial cinemas. However, this reflects or is influenced by population density and is unlikely to change significantly in the foreseeable future.

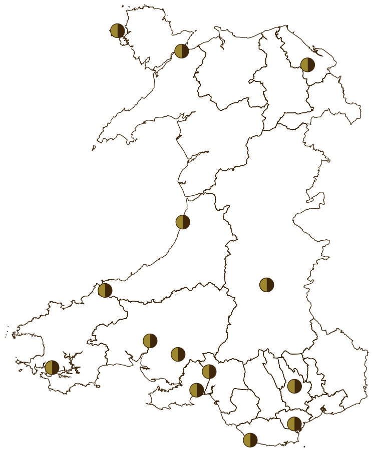
The not-for-profit sector, including the arts centres, is a key part of the cinema infrastructure in Wales which brings a wider range of provision to audiences. A great deal of effort and funding has been directed towards this sector in terms of cultural programming, refurbishment and new buildings. Much of the funding has come from the National Lottery and Arts Council of Wales. However, despite the importance of this sector, the multiplex sector in South Wales is likely to account for the overwhelming majority of cinema admissions and box office income in Wales.

In both Ireland and Wales, the importance of traditional cinema sites in smaller towns and rural areas in bringing a cinema programme to local audiences and maintaining a key local amenity cannot be underestimated. Many of these sites are maintained-sometimes against all odds-through the dedication, ingenuity and commitment of cinema owners and managers. Without these cinemas, audiences in smaller towns and rural areas would have no access to cinema and would be deprived of key local amenities.

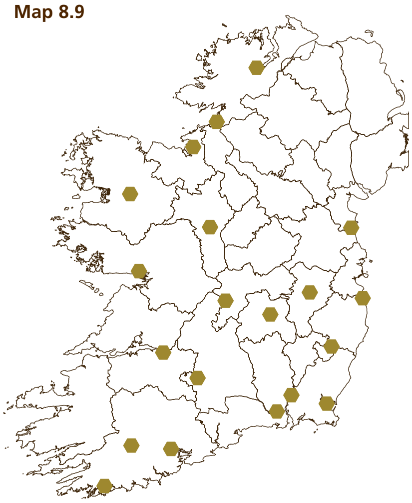
Cinemas in Ireland with a cultural programme
Map 8.7



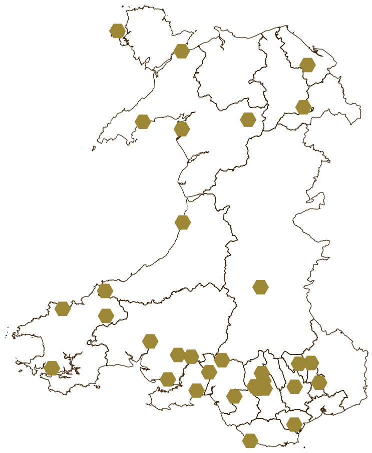
Cinemas in Wales with a cultural programme
Map 8.8



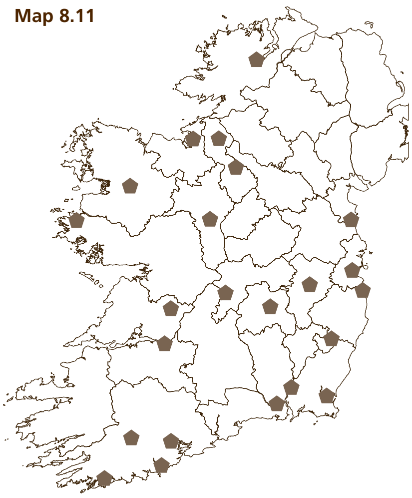
Art Centres and Multi-Use Venues in Ireland
Map 8.9



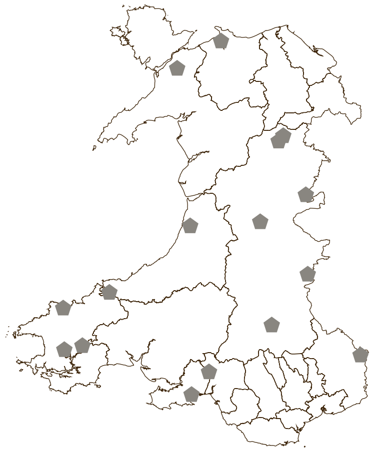
Art Centres and Multi-Use Venues in Wales
Map 8.10



Film Societies in Ireland
Map 8.11



Film Societies in Wales
Map 8.12



Accessibility

9.1 ACCESS LEGISLATION IN WALES

Assessment of the provision of facilities for cinema users with disabilities has been a key aspect of this research audit. In Wales, under UK legislation, the provision of facilities is guided by the 1995 Disability Discrimination Act [DDA]. This places duties on those providing goods, facilities or services to the public (e.g. cinema operators) and those selling, letting or managing premises. The legislation imposes a duty on service providers which requires them to anticipate the 'reasonable' adjustments they will need to make which enable disabled people to access services as each stage of the Act comes into force.

By October 2004, the physical features of premises must be upgraded to overcome physical barriers to access. This requirement is likely to have far reaching consequences for public venues, whether commercial or public sector. A Code of Practice [44] published in February 2002, gives examples of reasonable adjustments service providers might have to make. This indicates that several factors have a bearing on whether a change is a reasonable one to make including effectiveness; practicality; cost and disruption; and financial resources.

The Cinema Exhibitors' Association (CEA), which operates in the UK, has produced excellent and comprehensive disability access guidelines: "Best Practice for the Employment of and Provision of Services to Disabled People", 3rd edition October 2002. These have been sent to every cinema exhibitor in the UK.

The guidelines offer detailed advice and information for cinema operators on a wide range of areas including design guidance, public access and facilities, communication and information and disability etiquette. They stress that it is essential that cinema operators are seen to be actively tackling the issue of accessibility.

9.2 ACCESS LEGISLATION IN IRELAND

The legislative requirement in Ireland is different and is covered under the European Disability Directive.

The Arts Council is committed to addressing the needs of people with disabilities across the range of its activities and within each discipline, and provides support for arts and disability through advocacy and funding. It has produced the Arts and Disability Handbook, in association with the Arts Council of Northern Ireland, in recognition of the particular need for improved information and communication about arts and disability issues throughout Ireland.

9.3 ACCESS IN CINEMAS VISITED

The research audit and site visits show that many cinemas, particularly in Wales (because of UK legislatio), have been adapted or are being upgraded with appropriate facilities. But there are still a large number of cinemas where access is poor. Many (though not all) of these tend to be traditional cinema sites built before 1975.

A number of cinemas – of all types – in both countries provided good positions for wheelchair users, and a significant number have induction loop or infra-red systems for people with hearing difficulties. Some of the independent cinemas, which are in a poor condition cannot be readily or economically upgraded to meet basic disability access criteria.

Some cinemas still provide wheelchair access through rear or side entrances, often requiring assistance or necessitating a disabled person to travel down a poorly lit alley. The use of secondary or service entrances for disabled people will not be acceptable in new buildings under UK legislation.

Some facilities are well intentioned but poorly executed, for example, a low level wash-hand basin which cannot be used by a wheelchair user because a solid front panel blocks the wheelchair user from getting close enough to the basin (and the taps are even more inaccessible at the back of the basin).

A number of the arts centres funded by the Arts Council of Wales have been in receipt of funding to undertake disability access audits and are making a series of adaptations to meet the requirements of the DDA.

Despite the provision of best practice guidelines by the

[44] Code of Practice for Rights of Access: goods, facilities, services and premises, February 2002

CEA, we found that in some instances the level of knowledge and information exchange on disability access requirements is comparatively poor and that in many instances, facilities for disabled users could be improved.

In some instances, cinemas which have embraced the provision of facilities for disabled users, are tapping into new markets and describe active use by senior citizens groups, day care centres and others. The CEA best practice guidelines reference research published by the Employers Forum in the UK, which shows that:

- There are now over 8.5 million people with a disability in the United Kingdom,
- Net annual disposable income of disabled people in the UK is now estimated to be around £50 billion per year and growing,
- As the population ages the incidence of disability will increase,
- One in four families is likely to be directly effected by disability.' [45]

9.3.1 UK Film Council access programme [46]

The UK Film Council aims to work with cinema owners and operators to:

- Help accelerate the take up of accessibility technologies,
- Encourage cinema-owners to screen films in these accessible formats,
- Stimulate an effective geographical spread of accessible cinemas and screenings of popular films in an accessible format,
- Develop and apply best practice in terms of service provision and customer care on the cross-cutting strands of equality and diversity,
- Encourage the use of cutting-edge technology to enable full and active participation for all sectors of the community, and
- Provide funds to support the implementation of the Cinema Access Programme.

Four initiatives are being funded through the Cinema Access Programme:

1. Equipment – An allocation of £350,000 has been made for the installation of captioning and audio-description equipment in cinemas in England.
2. Film print provision – An allocation of £60,000 has been made for the provision of soft sub-titled and/or audio-described film prints for use in cinemas.
3. An allocation of £40,000 has been made for research and development into a personal captioning device to work alongside existing digital systems.
4. An allocation of £50,000 has been made for the creation and/or development of a bespoke website providing accurate information about availability and timing of screening of films, in subtitled or audio-described formats.

This programme has been made possible by an allocation of £500,000 from the Arts Council of England and will be available to support initiatives across England. The UK Film Council is working with the Northern Ireland Film and Television Commission, Scottish Screen and Sgrîn Cymru Wales in order that similar services are provided.

9.3.2 Disability access and the internet

It is important to recognise that, in the UK, the DDA applies to web sites operated by cinemas and arts centres. For many disabled people, the internet has been a breakthrough in access to information, yet the web sites of many arts and entertainment organisations defy internet standards and best practice guidelines which make their sites harder, or impossible to use.

A number of disability groups such as the Royal National Institute for the Blind are already backing legal action against web sites which do not comply with the DDA. Typical problems include web sites which only operate fully with a particular web browser or sites with poor legibility (especially common with arts centres web sites).

Apart from the actual usability of the web site, the services offered may contravene the DDA. For example, few cinema or arts web sites allow customers to book the wheelchair spaces, even although these could simply be treated as a distinct seating category. Similarly,

[45] Best Practice for the Employment of and Provision of Services to Disabled People, 3rd edition. Cinema Exhibitors Association October 2002. No similar data for Ireland was available for this study

[46] Extracts from the UK Film Council's documentation on the Cinema Access Programme, Dec 2003

infra-red headsets are rarely bookable in advance for people with a hearing impairment.

9.3.3 Concessionary tickets and disabled access

A number of cinemas and arts centres offer some form of concessionary ticket pricing for people with disabilities. The type of concession offered varies from a price reduction to schemes such as UCI's "+1 scheme" where the disabled person pays for a cinema ticket but their carer can go in for free.

However there is often confusion about why a concession is being offered. Is it offered in order to counter the reduced ability to pay for certain groups, and therefore aid inclusion policies? Or is it offered because the quality of the cinemagoing experience is at a lower level? Many cinemagoers with disabilities can afford normal ticket prices but may face considerable difficulties with their cinemagoing, for example ineffective induction loop systems or inadequately trained staff.

It is clear that further information dissemination, sharing best practice and raising access issues up the agenda, should be addressed as part of the development of any cinema exhibition policy resulting from this report.

Digital cinema

This study takes place at a time of considerable uncertainty surrounding the technologies to be used in cinemas in the near future. Since the late 1990s, the potential of high definition digital video projection to replace the 35mm film format has been tested extensively. Despite the slow and erratic adoption of new technologies, the cinema industry in general, expects that digital cinema will increasingly play an important role, even if it never fully replaces film.

10.1 D-CINEMA OR E-CINEMA?

'Digital cinema', or 'D-cinema', is the term that has been adopted to indicate systems which use high-definition digital video projectors which rival or surpass the quality achieved with a 35mm release print. There is no agreed specification for this equipment but the majority of systems in use are based on Texas Instruments' DLP micro-mirror technology.[47]

A complete system includes the projector and lamphouse, a storage and control unit (broadly equivalent to a long-play film platter or tower, and a cinema automation unit), along with a standard cinema digital sound system. The cost of the projector and storage system is currently several times more expensive than a comparable new 35mm system and is usually *the* major consideration for cinemas wishing to adopt the new technology.

Approximately half of the digital cinema installations are in the USA, with the rest spread among Europe, Japan, Latin America (especially Brazil), and China. In the UK, independent arthouse circuit City Screen has the largest number of D-cinema installations.[48] In Autumn 2003, the Odeon Leicester Square had a highly successful run of the animated feature *Finding Nemo* on its D-cinema system. Audience surveys at D-cinema screenings have shown large majorities preferring the digital presentation compared to conventional 35mm.[49] Currently there are no D-cinema installations in either Ireland or Wales.

'Electronic cinema', or 'E-cinema', is a lower quality system based around more traditional video projectors. Again there is no single specification for the equipment. The term E-cinema is often used to refer to all non D-cinema systems, from a screening in a community hall up to the professional systems now being used by a rapidly increasing number of European cinemas for 'pre-show digital' which consists mainly of screen advertising and film trailers.

In addition to pre-show digital, E-cinema systems are used by film societies, mobile cinema operators (not Cinemobiles which use 35mm), arthouse or arts centre venues for specialist screenings, and film festivals. Thirteen of the film societies in Ireland's 'access CINEMA' network screen films on DVD based equipment. A number of rural touring cinema schemes such as *Flicks in the Sticks* [50] use similar, highly portable equipment to provide screenings in community halls throughout Shropshire and Herefordshire. E-cinema equipment can also used for non-cinema purposes such as lectures, business conferences, and screening of sporting or cultural events.

10.2 FEATURE FILMS FOR D-CINEMAS

The key to the adoption of 'D-cinema' by public cinemas is the availability of appropriate films to screen. In most instances, this means new release Hollywood films[51], especially titles released by the seven major studios. The major studios jointly formed a Digital Cinema Initiatives company to investigate and determine a set of standards for D-cinema. They are scheduled to complete their work in the first half of 2004. Until the major studios agree on technical standards and a business model for D-cinema, the number of new releases which cinema can play will remain restricted.

While the key commercial films generally come from the major studios, the rest of the world of cinema is taking a more relaxed attitude to D-cinema releases. In South Africa, Ster-Kinekor is equipping five cinemas to screen feature films made in South Africa on the HD video format. Cinemas in China and Brazil are following a similar path.

In Sweden, Folkets Hus och Parker (FHP) operate 267 single screen cinemas, many of which are in smaller

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[47] TI's DLP technology is used in projectors manufactured by Barco, Christie, Digital Projection and others. See: www.dlp.com/, www.barco.com/digitalcinema/, www.christiedigital.com/, and www.digitalprojection.co.uk

[48] City Screen, in partnership with Arts Alliance, is planning to install D-cinema systems in at least seven of its cinemas

[49] See 'Digital Cinema Audience and User Preference', Screen Digest, based on a survey of cinemagoers attending *Harry Potter and the Chamber of Secrets* at two Californian cinemas

[50] Flicks in the Sticks is operated by Arts Alive, www.artalive.co.uk

Digital cinema

towns where new films typically arrive six-eight weeks after their initial release. In 2002, FHP set up Digitala Hus (Digital Houses) and equipped seven of its cinemas in rural communities with high definition D-cinema equipment. Most of the films screened to date have been domestic releases (which are not subject to the USA major studios' requirements). These Digitala Hus cinemas now have access to new releases at the same time as the Stockholm premiere cinemas. Understandably, attendances at these cinemas have increased substantially, typically 25-30% above previous levels. Income from digital screenings now accounts for between 20% and 40% of all box office at these cinemas.[52]

10.3 PRE-SHOW DIGITAL

Screen advertising is driving the rapid adoption of E-cinema systems in commercial cinemas in the USA, Norway, Germany and in the UK with Carlton Screen Advertising. The advantages of filmless commercials include cost savings on prints, rapid deployment (via satellite), flexibility of scheduling (adverts programmed to suit each film, audience and screening time), and a lower cost entry level for new advertisers. The main disadvantage for cinemas is that this lower quality system may lead to confusion in the audience's mind about what 'digital cinema' can offer.

10.4 SPECIALIST CINEMA AND DIGITAL FESTIVALS

While Hollywood deliberates, much of the cinema world, including many USA independents and European cinema sectors, are actively embracing digital cinema. Many of the leading international film festivals are making extensive use of digital projection. The Berlin Film Festival equipped ten cinemas with D-cinema equipment for the 2004 festival and screened 47 titles in digital format.

For specialist distributors, especially those dealing with foreign language films, D-cinema has the potential to transform the way they operate. A single digital copy with multiple language subtitle and dubbing tracks can be sold throughout the world, greatly reducing costs and increasing flexibility – for example the same film can be shown in dubbed version for some screenings and the subtitled version at other screenings.

The arrival of the UK Film Council's Digital Screen Network, with up to 250 screens equipped with D-cinema equipment, complementing City Screen/Arts Alliance's existing seven screen digital network, provides the opportunity for distributors of specialist films to consider releasing a digital-only version of their films. If this happens, cinemas without digital capabilities, which may include many cinemas in Ireland and Wales, would be unable to screen certain specialist films.

10.5 DIGITAL CINEMA IN NON-METROPOLITAN AREAS

The D-cinema and E-cinema installations to date have been concentrated in major international cities and in high profile, usually commercial, cinemas. However many of the benefits available from digital cinema technologies are potentially more relevant to smaller, non-metropolitan cinemas such as those operated by Folkets Hus in Sweden.

The principal benefits of digital cinema for market town, rural and remote cinemas are broadly expected to be:

- Access to new release films – commercial, arthouse and specialist – at the same time as cinemas in the capital cities (the key audience benefit which is likely to result in increased attendance levels and improved viability for the cinemas),
- Guaranteed high quality image and sound (second-run cinemas often receive prints which are scratched and damaged),
- Lower 'print' transport costs and reduced workload associated with print transport (many smaller, rural cinemas routinely suffer problems with print supply which results in considerable extra work for the staff),
- Greatly increased choice of films for screening to niche markets – education, special interest groups, lifelong learning groups, language study groups, senior citizens, young people, new filmmakers,
- Ability to offer day-time use of the cinema to local organisations and businesses for seminars,

[51] In 2002, 19 out of the top 20 films released in the UK and Ireland were fully or partly USA productions. The single exception being *Bend it Like Beckham*. Data from UK Film Council Statistical Yearbook

[52] 'Digital Houses: Europe's First Digital Cinema Circuit', Folkets Hus och Parker, 2003

conferences, live-relays with other venues, and training events. Additional revenue sources are expected to assist the viability of cinemas in market towns and in some rural areas, although cinemas in the more remote areas are less likely to benefit from these additional uses and sources of income,
- Ability to screen locally produced, and locally relevant, films/videos including local advertising.

Taken together, the potential benefits could revitalise many non-metropolitan cinemas by dramatically extending their programming and improving their commercial viability and sustainability.

However for these benefits to be realised, the cinemas must be suitably equipped and the cinema distribution sector must recognise that these non-metropolitan cinemas should be treated as a distinct category which is fundamentally different from city-based multiplexes.

Specifically, distributors must be willing to supply digital copies of new releases 'on-date' to suitably equipped smaller cinemas and, crucially, to allow the cinemas to determine the playing pattern – the number of days, the timing and number of performances, and the period that the film can be retained for screenings. This flexibility is required to allow local cinema managers to tailor the film screenings to local circumstances and to ensure that their cinema remains a sustainable and popular venue within the local community.

10.6 OPPORTUNITIES IN IRELAND AND WALES

The roll-out of D-cinema in the UK and Ireland – assisted largely by the UK Film Council and European DocuZone – and E-cinema – especially through Carlton Screen Advertising's efforts – will result in much greater attention on these new cinema technologies during 2004-05.

A range of opportunities for cinema exhibitors in Ireland and Wales to become involved with these systems already exist. These include:

- D-cinema installations in capital city cinemas for premiere screenings and high profile commercial releases,
- D-cinema installations for key cultural cinemas to ensure access to new specialist releases and to provide facilities for major film festivals,
- D-cinema installations in new and redeveloped cinemas in market town and rural areas (along the lines developed by Sweden's Folkets Hus, see above),
- E-cinema installations for pre-show digital material,
- E-cinema installations for arts centres, multi-use venues, mobile cinemas, and potentially for non-traditional venues such as pubs, hotels, schools, and community halls,
- E-cinema installations to assist with film and media education activities.

It is unlikely however, that mainstream multiplex cinemas and commercial multi-screen cinemas will themselves fund a rapid transition to D-cinema. It is widely expected that third parties, whether publicly funded or commercially driven, will be crucial to the transition to digital cinema and related activities.

Public funding

11.1 ARTS COUNCIL

The Arts Council is the Irish Government's development agency for the arts and is the major funder of the arts in Ireland. Its purpose is to promote the value of art in society, to enhance the quality of people's experience of the arts and to recognise both promise and achievement in the making of art. It shares responsibility with the Irish Film Board for the development of creative and industrial film in Ireland.

The Arts Plan 2002-2006 outlines the Arts Council's vision:

'In the long term our vision is for a creative Ireland, where the arts are dynamic and self-reliant, valued and nourished by society, and open for all to make or enjoy.' [53]

The Arts Council confines itself to the cultivation of creative experiment in film, stating its key objective 'to nurture film as art'. The Arts Plan notes that the 'Irish Film Board is responsible for the development of the industry more broadly. Together, the two bodies are concerned to broaden the range of film available to Irish audiences'[54].

From the Arts Council's perspective, the key issues in relation to film are:

- The investment-driven climate for film and TV production does not provide opportunities for artistic innovation and experiment,
- The commercial exhibition system for cinema limits the range of work available to audiences,
- The limited programming expertise and physical facilities for cultural cinema, especially outside major urban areas, constrains the quality of the audience experience,
- International promotion of Irish film artists' work is hindered by poor access to international film festivals, fairs, screenings and other opportunities,
- The potential impacts of transformations in production and exhibition technologies have not yet been fully grasped.

The Arts Council's total budget for 2003 was €44 million. Of this, revenue funding for film – including resource organisations, production companies and film festivals amounted to approximetely €1.3 million. The largest funded client by far is the Irish Film Institute.

Though the allocation for film is smaller than some art form areas[55], it represents a not insignificant amount of money. It exceeds the total grant funding made by Sgrîn and is comparable to the UK Film Council allocation to some of the English Regional Screen Agencies[56].

11.1.1 Cultural Cinema Consortium

In 2003, the Arts Council launched a capital funding scheme in partnership with the Irish Film Board following research commissioned jointly through the Cultural Cinema Consortium two years earlier. This was followed by a second call for proposals in February 2004. The main objectives of the Cultural Cinema Consortium are to enhance and expand the range of cinema in the Republic of Ireland; to ensure audiences have a quality cultural experience with regard to world cinema, indigenous film-making and classic films; and to foster an attractive investment environment for art house film infrastructure.

In July 2003, under Phase One of the Consortium's capital investment scheme, capital investment funding valued at €750,000 (c£525,000) each was awarded to Kino in Cork (for a complete redevelopment of the cinema) and Belltable Arts Centre in Limerick (for development of the new Filmhouse art house cinema). Minor Capital funding was also awarded to projects including Access Cinema, Garter Lane Arts Centre, Waterford and the Irish Film Institute, Dublin.

The second phase of the scheme invites proposals from exhibitors, developers or local consortia for the creation of two-three screen dedicated cinema facilities in urban centres to commence building by end of 2005. It also seeks proposals from art house exhibitors for building refurbishment and technical equipment investment - especially in relation to improvements to enhance physical access and audience facilities.

53 The Arts Plan 2002- 2006. The Arts Council. Pg 7
54 ibid. Pg 30
55 It should be noted, however, that Arts Council funding is allocated by programme strand rather than art form.
56 The UKFC allocations to the English Screen Agencies form only part of the total income and do not equate to turnover.

11.1.2 Developing cultural cinema in Ireland

The report, Developing Cultural Cinema in Ireland, on which the capital scheme is based, is a key report for the cinema sector. It was commissioned by the Arts Council, the Irish Film Board and Enterprise Ireland, in association with the Northern Ireland Film Commission and was researched and authored by Neil Connolly and Maretta Dillon. This influential report argues that cultural cinema has been seriously under resourced in Ireland. "The emphasis must shift back not simply to ongoing support for key existing initiatives, but to developing a framework to sustain future development," the authors state. The report makes a series of recommendations including the need for the Arts Council to:

- Restate its responsibility for film exhibition and play a larger advocacy and funding role,
- Appoint specialist film staff,
- Work more proactively with relevant film organisations, local authorities and other agencies to widen access to cultural cinema in all areas,
- Work together with the Northern Ireland Film Commission and others to place education activities and the development of new audiences at the centre of funding support,
- Work together with Screen Training Ireland and others to organise appropriate training initiatives in the cinema exhibition sector.

In the preface to the report, the Irish Film Board suggests that the principal efforts should be directed towards consolidating and extending art house exhibition outside Dublin. The IFB also pointed to the need to "strengthen access to world cinema in other cities and regional centres" and suggest that partnerships between cinemas in Dublin and the regions could support the release of new titles. The report and subsequent work of the Cultural Cinema Consortium has progressed a number of agendas particularly around expanding the art house infrastructure by, for example, upgrading their cinema equipment from DVD to 35mm.

11.2 SGRÎN

Sgrîn was established in 1997 as the media agency for Wales. It is responsible for the formulation of a strategic vision for the development of the industrial and cultural aspects of film, television and new media. It is committed to enhancing the Welsh economy and Welsh culture by encouraging industrial growth, cultural development and public involvement in film in all its forms. It sees the moving image as an important contributor to the economic and cultural life of Wales and seeks to ensure that this contribution is maximised for the benefit of all Wales.

Sgrîn's current strategy focuses on the twin aims of 'developing entrepreneurship and skills within the media industries to ensure that participants from Wales are able to confidently and equitably compete in European and international markets', and through its cultural and educational work, 'support public access as participant and audience and provide the foundations for enhanced employment opportunities'.

Sgrîn's vision for, and commitment to, cinema exhibition in Wales, was outlined in the document Exhibition – The Way Forward. This stresses the cultural and economic aspects of Sgrîn's policy and argues that, "*the existence of a successful exhibition infrastructure must be an essential prerequisite for the existence of a film culture for Wales, unless this is to be largely dependent on television as a means of access. This is particularly true for Welsh language films.*" [57]

The strategy notes that support for exhibition must take into account the differing needs and circumstances in various parts of Wales – drawing attention to rural and urban areas and different types of venues and operations.

Key objectives outlined in the document include:

- Encouraging an increase in cinema-going, encouraging the audience to see a wider range of films, and a greater understanding and appreciation of film in the audience for the future (endorsing the DCMS document – A Bigger Picture).
- Attempting to ensure that the public in all areas of Wales has access to programmes of mainstream and

[57] Exhibition – The Way Forward. Sgrîn Cymru Wales

Public funding

cultural cinema within 40 minutes' drive time or via the public transport network,
- Highlighting productions of relevance to Wales, specifically by ensuring that they are distributed and exhibited,
- Engaging with exhibitors on a more regular basis, with a view to improving dialogue between exhibitors and interested parties.

Sgrîn has identified direct actions through which it will ensure delivery of these objectives including the provision of funding for film exhibition in Wales and lobbying and advocacy.

Sgrîn receives funding from a wide range of partners including The Arts Council of Wales, The Welsh Development Agency, BBC Wales and S4C. In 2002-2003 its total income was £2,115,886 (c€3.03 million) of which £612,081 (c€875,000) was awarded in grants[58]. Core funding is provided to Chapter Cinema of £39,250 (c€56,000) and to the Cardiff International Film Festival of Wales of £23,500 (c€33,500). A further £8,731 is awarded in project grants to various exhibition clients including the Wales One World Film Festival, Theatr Mwldan Film Festival and others.

11.3 UK FILM COUNCIL

The UK Film Council is the Government-backed strategic agency for film in the UK. Its main aim is to stimulate a competitive, successful and vibrant UK film industry and culture, and to promote the widest possible enjoyment and understanding of cinema throughout the nations and regions of the UK. The Film Council notes that, *"cinema is an immensely powerful medium at the heart of the UK's creative industries and the global economy. Cinema entertains, inspires, challenges and informs audiences. It helps shape the way we see and understand ourselves and the world"*.
The UK Film Council has allocated £24 million (c€34.3 million) through its distribution and exhibition department over three years, 2003 - 2006 to help develop audiences in the UK. This funding includes The Digital Screen Network (DSN), the Cinema Access Programme and the UK Film Distribution Programme which includes a print and advertising fund for specialised films. It is also supporting an education fund.

11.3.1 Digital Screen Network

One of the most ambitious of the UKFC exhibition/distribution schemes is the Digital Screen Network (DSN) which will be realised in partnership with relevant organisations and institutions including Sgrîn. The Digital Screen Network strategy envisages a 'virtual network' of up to 250 screens, located in approximately 150 cinemas. It is open to all full-time licensed cinemas in the UK. The UK Film Council notes that establishing a balanced and inclusive geographical spread of cinemas will be vitally important. *"Currently, access to specialised film is restricted across the UK. One of the principle reasons for this restriction has to do with the delivery medium. As with all films, distribution of specialised product is currently via 35mm celluloid prints. Such prints are expensive to produce and a major cost consideration for a distributor when they plan a specialised film's release. Furthermore, exhibitors are often inhibited in their ability to build an audience for specialised film because of this restriction on prints. 35mm cinema, therefore, does not encourage the wider distribution and exhibition of specialised product. Digital technology offers a potential solution to this economic constraint as the cost of producing digital copies can offer significant cost savings on striking 35mm prints. The Digital Screen Network, furthermore, will facilitate enough of a 'critical mass' in terms of exhibition outlets to ensure specialised product can reach a much wider audience"*.

11.3.2 Non-theatrical digital cinema

To complement the high end Digital Screen Network, the UK Film Council is offering film clubs and local film societies, community groups and mobile film exhibitors up to £5,000 (c€7,150) to help buy high quality DVD-based digital projection and related equipment including sound systems. Successful applicants will receive an award of between 50% and 80% of the purchase cost of the equipment.

[58] Sgrîn Cymru Wales Annual Review 2002-2003

The *Digital Fund for Non-Theatrical Exhibition* is financed by an allocation of £500,000 (c€715,000) from the Arts Council England. An important characteristic of the fund is that it is available to experienced cinema operators who already operate, or wish to operate, mobile cinema ventures.

11.3.3 Cinema Access Programme

The UK Film Council has also introduced a series of initiatives which will help the industry to increase access for people with sensory impairments. Because this is supported by an allocation of £500,000 from the Arts Council England it is currently only available to support initiatives located in England. It is hoped that the scheme can be extended to other UK nations.

In addition to the measures above, the UK Film Council has allocated £1 million for one year to support a specialised prints and advertising fund. The programme aims to support the distribution of more commercially focused British films in the UK and to encourage greater accessibility of British film in the UK by offering a degree of risk protection to films whose release plan in the UK entails a high degree of risk.

Impact

Cinema can play an important role within regeneration and cultural development strategies. Both the Irish and Welsh spatial strategies point to policies and issues where the cinema sector should have a role.

The Welsh Spatial Strategy emphasises the need to build sustainable communities as one its future priorities. It highlights a number of measures for identified zones including encouraging co-operation to identify and strengthen regional towns; supporting appropriate provision of services including education, culture and leisure; as well as strengthening linkages between towns and rural areas and identifying local centres where service provision can be optimised.

In a similar manner, the Irish Spatial Strategy highlights five core messages or priorities including creating a better quality of life and better places to live in. Emphasis is placed on the importance of leisure activities and facilities, social needs (including cultural facilities) and the highest quality of design in new development and refurbishment.

- The strategy notes that infrastructure on its own does not deliver balanced development and that many other economic and social factors also influence spatial development.[59]

Within social infrastructure, the NSSI identifies relevant organisations such as schools, third-level institutions, healthcare, sporting and **cultural facilities**.[60]

The strategy notes that in terms of larger urban areas – if balanced regional development is to work, the spatial strategy outlined must be supported by policies aimed at enhancing the attractiveness of areas for people. 'Physical and cultural liveliness will be required to ensure that there is a **combination of attractive social and cultural facilities** for both people and business.'[61] In medium sized towns, the NSSI notes that many people are attached to a more rural way of life, with its emphasis on the importance of community. And in terms of rural areas, the strategy examines the best means of protecting and enhancing aspects of rural life such as the strong sense of community, 'while at the same time **improving access to social and cultural facilities**'[62].

The key role that cultural facilities, and specifically cinema, can play within national spatial development is something which arguably should have greater prominence. However, for this to occur, there is a need for greater advocacy for the important role cinema can play in local communities.

Kim Howells MP, Minister for Tourism, Film and Broadcasting, speaking at the 2003 UK Cinemas Conference said:

"Cinemas are important – to people, to communities, as an art form, for the investment they make in this country and for the employment they provide." *Anecdotal evidence from this research emphasises the importance of cinemas within local communities. In many of the towns surveyed, cinemas are the main or in some cases, the only, leisure amenity. They are also important tourist facilities, particularly for towns with few wet-weather facilities.*

The Tipperary Excel Heritage Centre, for example, is a key venue for the local community and provides the only cinema within 20 miles. The Ormonde, a traditional two screen site, run as an independent, is the only cinema in Middleton, a town with limited leisure amenities. Without the cinema, local residents would have to drive 20 miles to Cork to see film. Theatr Mwldan is a key arts and cinema venue for south west Wales and is the only cinema in Cardigan. Likewise, the Royal Playhouse Cinema is the only cinema in the seaside resort of Tenby. There are many other similar examples.

These are areas which can be championed by local authorities and clearly synchronise with national spatial strategies in both Wales and Ireland. Since the end of 2002, UK local authorities have been required to produce local cultural strategies covering a wide range

[59] National Spatial Strategy for Ireland - People, Places and Potential. The Stationery Office Dublin. Pg. 109
[60] Areas marked in bold are authors' emphasis
[61] ibid pg. 110
[62] ibid pg 111

of activities, including arts and media, sports, parks, museums and libraries, the built heritage, playgrounds and tourism. They are intended to set policy direction and help local authorities to allocate resources as well as to develop monitoring mechanisms.

Speaking at a conference on local cinema, Tim Challans, Assistant Director of Community Services (Leisure) for Nottingham County Council, described that:

> *"The cultural strategy process provides a unique opportunity to start thinking of leisure and recreation activities in a new way, as an integral part of the development and regeneration process."*[63]

Cinema can genuinely impact on the social, cultural, economic, tourism and educational development of towns and cities, contributing to better quality of life. However, this impact needs to be assessed and where appropriate, measured. Specific measures can be looked at as part of impact assessment – a possible framework is outlined below. It is by no means an exhaustive list and can be developed and adapted by local authorities and other partners.

12.1 IMPACT ASSESSMENT

The following list of impacts provides an indication of the diversity of impacts that cinemas may have. While some impacts are relatively standard and straight forward to assess – for example the range of films shown, the number of performances, the attendances, and the value of the tickets sold – others such as the architectural impacts may only apply in specific circumstances.

There are two important distinctions that need to be acknowledged when considering impact assessments:

1. The distinction between 'impact', which implies change or development, and 'importance' or which is a more static concept, although both are relevant; and
2. The distinction between diversion of consumer spending (from other cultural and leisure activities) and the generation of economic growth through new, or additional, consumption and employment.

A variety of methods may be used to assess impacts, from commonly used numerical methods through 'tick the box' methods which record whether or not a particular impact is present [64], to qualitative approaches such as those developed by arts consultancy, Comedia.[65]

12.1.1 Cultural

- Provision of regular evening entertainment,
- Access to mainstream and specialist films,
- Provision of film and moving image culture,
- Access to films from other parts of the world and other cultures,
- Development of a town or area's cultural and leisure profile,
- Connections to national and international cinema sectors,
- Development of Irish and Welsh culture through the medium of cinema,
- Opportunities for the cinema to complement other cultural activities such as festivals, literary clubs, libraries, and special interest groups.

12.1.2 Economic

- Employment – both direct at the venue and indirect with suppliers, for example cleaning contracts, consumable suppliers, printers, web designers, technicians. All measured in full-time equivalent jobs as well as cash value,
- Tax – VAT and employment taxes
- Local spend – by the cinema and by audiences who attend the cinema, for example on transport and other leisure such as at pubs, cafes and fast food establishments,
- Halo effects – the effect of the cinema's activities in attracting complementary business such as pubs, cafes, specialist book/CD/DVD shops to locate near the cinema,
- Associated development of media and cultural industries – stimulating and/or anchoring a cluster or cultural, recreational and social businesses,
- Participation in the local 'offer' which is used to attract businesses and graduates to a town or area,
- Attracting regional, national and international capital, revenue and project funding into the town or area,

[63] Delivering Local Cinema Conference Nov 2000. A National conference for cinema operators and local authority economic, cultural and environmental planners

[64] See for example the Royal Institution of Chartered Surveyors report 'Comprehensive Project Appraisal: Towards sustainability", 2001, which details a range of techniques which can be used in impact assessment. www.rics.org ISBN 1-84219-049-0

[65] See 'Measuring the economic and social impact of the arts: a review' by Michelle Reeves, Arts Council of England, April 2002, for a comprehensive overview of work in this field

(especially relevant in the case of not-for-profit organisations),

- Ancillary spending by people attending film festivals or courses (accommodation, travel, catering, etc),
- Travel-related impacts – both positive in terms of business for transport operators, and negative in terms of pollution, congestion and noise.

12.1.3 Social

- Provision of affordable accessible entertainment,
- Contribution to the local quality of life,
- Contribution to the local identity of the town/area,
- Fostering a sense of community,
- Fostering a sense of social inclusion through special screenings (for example for children, for senior citizens, or for parents with you children), efforts to make cinemagoing affordable, and through programming films for all communities,
- Provision of accessible entertainment for people with disabilities (especially, given the advances in audio description and closed captioning, people with sensory impairment),
- Encouraging volunteer effort,
- Reduction in crime and disorder (especially during the evenings in town centres),
- Negative impacts of noise, litter, and congestion.

12.1.4 Educational

- Partnerships with local schools and colleges, including teacher training and curriculum development activities,
- Opportunities for lifelong learning courses and activities,
- Developing educational ambition (perhaps through filmmaking or through exposure to films which stimulate awareness/self development),
- Development of range of specialist skills including programming, management, projection, customer services, and retailing.

12.1.5 Tourism

- Cinemas improve the level of visitor amenities and can be a factor in decisions to visit a town or area,
- Value of visitor spend, including the spend at other leisure facilities during the visit to the cinema,
- May encourage overnight stays because of the availability of evening entertainment.

12.1.6 Architectural

- Potential to create a landmark building for the town or area,
- Ability to 'anchor' developments in town centres and retail parks.

Overview and opportunities

This audit of cinemas in Ireland and Wales has identified strengths in the two sectors but has also pointed to vulnerabilities which if left unattended may result in a decline in cinema provision. In this Chapter, the principal issues and trends identified earlier are drawn together in order to provide an overview and indication of where intervention or collaboration might best be directed.

13.1 ISSUES FROM THE AUDIT OF CINEMAS IN IRELAND

13.1.1 Irish Spatial strategy

Despite the doubling in cinema admissions over the past decade, the number of active cinema sites has declined by 15% over the decade 1992-2002. The Irish Spatial Strategy acknowledges that in recent years, economic development and population growth has been uneven leading to underdevelopment in some areas. Although cinema provision is not highlighted in the strategy, the sector too has undoubtedly suffered from the same effects with considerable concentration of provision in Dublin. There is a good case for ensuring that the National Spatial Strategy includes cinema provision, as both an anchor for the evening economy in town centres and as an important cultural facility for residents and visitors alike.

13.1.2 Sector structure

The structure of the Irish cinema sector is clearly dominated by the presence of the Ward Anderson cinemas which account for approximately 40% of the market [66]. The presence of a "national circuit" has ensured that many smaller towns have been able to retain an active and successful cinema, but this dominance could become a sector weakness if for example, Ward Anderson chose, or was forced by circumstances, to withdraw from the smaller towns where they operate.

To date, the major international and UK exhibitor circuits have limited their activities to Dublin city and have left other major cities and conurbations to local or regional mini-circuits. The presence of five local cinema entrepreneurs, operating outside Dublin and accounting for 20% of all cinema sites in Ireland, is a strength but with an average of just 12 screens each, they are still an emerging force.

13.1.3 Local authority support

The role of arts centres and multi-use venues in Ireland is generally restricted to film society activities, with only two venues actively screening films to the general public. In contrast, many Welsh arts centres play a central role in ensuring that newly released and specialist films are available in the more remote parts of the country. In both countries, local authorities play an important role in the creation and operation of arts centres but there is little evidence to indicate that cinema provision has become a significant issue for most local authorities in Ireland.

13.1.4 Cinema buildings

The cinema buildings surveyed vary widely from state-of-the-art through to run-down traditional cinemas. While the majority of the buildings are newly built and in good condition, approximately 30% fall below contemporary standards and require refurbishment or redevelopment. Accessibility for people with disabilities is one particular area where new legislation may pose difficulties for several cinemas. While most cinema owners and managers were aware of the need to provide an accessible service, many had not planned appropriate upgrading of their facilities. In the UK, the Cinema Exhibitors' Association has taken a lead in developing good practice for disability access and their Best Practice Guidelines provide excellent guidance applicable to cinemas in Ireland and elsewhere.

13.1.5 Locations

The choice of location for a cinema is inevitably influenced by many, often competing, factors. However it was noticeable during the audit that only a small number (approximately one quarter of the cinemas visited) were on sites where future expansion was possible. Several cinemas visited had expanded over the years – the Gaiety in Sligo, the Omniplex in Galway, the UGC in Dublin, the Abbey Centre in Ballyshannon, and others – and several exhibitors expressed a clear desire to add more screens to their present cinemas. It therefore appears that more attention ought to be given to future expansion than has previously been the case.

[66] by admissions

Overview and opportunities

13.2 ISSUES FROM THE AUDIT OF CINEMAS IN WALES

13.2.1 Arts centres and multi-use venues

Many parts of rural and remote Wales rely on their local arts centre or multi-use venue to provide a public cinema service. This sector is supported by public funding – generally from the relevant local authority but also in recent years from the National Lottery.

While these venues offer a valuable service, they are sometimes unappealing to sections of the cinemagoing public (particularly teenagers) because they do not match a modern multiplex experience. In part, this is due to venues screening films several weeks after initial release but it is also attributable to the standard of the cinemagoing experience. In many instances these venues are in adapted buildings and the quality of viewing and listening varies considerably.

13.2.2 Welsh Spatial strategy

The distribution of cinemas throughout Wales is biased strongly towards the south Wales coast between Newport and Swansea where all but two of the country's multiplexes are located. The west coast and central Wales are poorly served by modern cinemas, although it should be recognised that these are sparsely populated areas where it would be difficult to obtain a satisfactory return on an investment in a commercial cinema. This geographical distribution is reflected in the spatial strategy.

13.2.3 Sector structure

Unlike Ireland, most of the UK national exhibitors have at least one cinema operating in Wales, although as noted, the majority of the new multiplexes are located in the capital city, Cardiff.

Independent operator, South Wales Cinemas, plays an important part in the Welsh cinema sector both as a cinema owner and as a provider of contract management and programme services. This circuit is larger than any of the comparable Irish minor circuits but is essentially the only independent circuit in the country.

13.2.4 Volunteers

An important aspect of the cinema sector, especially in rural Wales and in the Welsh Valleys, is the contribution made by several hundred volunteers. Almost one-in-five Welsh cinemas rely on these dedicated people without whom the cinema would probably cease to exist. The film society sector accounts for yet more volunteers.

13.2.5 Cinema buildings

A striking aspect of the cinema sector in Wales is the large number of venues – over one third – which were built prior to 1945. Although most of these venues have benefited from one or more redevelopment and refurbishment programmes, the cinema auditoria rarely equal the seating, viewing and listening environments of modern multiplexes. More positively, these venues may offer an individual venue with character and charm which is well liked locally.
The older buildings create serious difficulties for disability access but the majority of the venues visited had made considerable efforts to upgrade their facilities to meet the demands of disability discrimination legislation.

13.2.6 Viability

The cinema sector in Wales accounts for approximately 5% of the UK's cinema screens, closely in line with the proportion of the Welsh population compared to the overall UK population. However over half of the cinemas in Wales are under-performing in terms of admissions per screen compared to UK averages. Many are operating at attendance levels less than one-third of the average, and do not offer an attractive prospect for distributors wanting a good return from their films.

13.3 ISSUES FROM THE AUDIT OF CINEMAS IN BOTH IRELAND AND WALES

13.3.1 Cinema strategies

Neither country has a generally accepted cinema development strategy which unites political, commercial and cultural concerns. Responsibility for the cinema sector is spread among various government departments and organisations, including trade organisations. The result of this fragmentation is a lack of presence in government planning, in development strategies, and in cultural policy.

13.3.2 Personnel

Reliance on key personnel within individual cinemas and across groups of cinemas represents a notable vulnerability for the cinema sectors in both Ireland and Wales - whether these are managers, programmers, marketing staff, projectionists and technicians, or front of house staff with a wealth of knowledge about their local, regular audience. These individuals devote energy, enthusiasm and commitment to their cinemas, often for little reward. The cinema sector is not unique in this respect but many venues visited rely on one or two people to keep the venue operating and if they leave or retire it could be difficult to replace them.

There is a lack of suitably knowledgeable and skilled programmers, projectionists, and service engineers to successfully run independent cinemas. Multiplexes are better equipped to train and develop staff and inevitably independents and smaller circuits rely on some of these people moving to their smaller cinemas. However the relative lack of suitable training and career development options is a weakness in both Ireland and Wales.

13.3.3 Internet marketing

Web sites and email are transforming cinema marketing, from provision of information, through ticket selling, to ancillary services such as downloadable trailers, previews, and ordering of DVDs.

The quality of the web sites and supporting internet services varies widely, but it is clear that independent cinemas are far less adept at using the marketing opportunities that internet technologies provide.

13.3.4 Cinema auditorium design

Cinema audiences have high expectations of their cinema going experience - excellent seating, an unobstructed view, a large screen, digital multi-channel sound, a warm freshly ventilated auditorium, a welcoming foyer with a good choice of concessions. The cinema industry believes that it has perfected the contemporary in-auditorium experience. Throughout the audit, a substantial range of buildings were visited, many of which were excellent and several exhibited innovative design solutions to challenging circumstances.

However, it is evident from the audit that a number of recently opened cinemas have not been built to optimum standards. Issues encountered include: over-large screens which make viewing uncomfortable for audiences seated towards the front of the auditorium; poor acoustic insulation between adjacent auditoria so that films must be played too quietly; badly designed projection rooms; awkward ticket selling and concession selling areas, poorly positioned auditorium exit doors; and badly positioned wheelchair spaces.

Architects and clients developing arts centres sometimes appear susceptible to compromise design solutions which adversely affect the cinemagoing experience, even when this constitutes the major part of the venue's activities.

Although there are no agreed standards for contemporary cinema auditoria with stadium seating, the design guidelines developed by the Society of Motion Picture and Television Engineers (SMPTE) in 1989 and 1994 are still relevant and provide a good reference for all cinema design.[67]

13.3.5 Cultural and specialist cinema programming

The comparatively low level of specialist programming by cinemas in both Ireland and Wales has been noted earlier in this audit. Film festivals and some film societies provide alternative opportunities for audiences wanting to see more than just the major recent releases but these activities are spread unequally around both countries.

The advent of digital cinema (D-cinemas and E-cinema variants) offers the potential to radically overhaul the cinema programming model and the relationship cinema

[67] Design of Effective Cine Theatres' A SMPTE Engineering Guideline (EG 18-1989 & revision EG 18-1994), reproduced in the BKSTS publication Cinema Technology, January 1991. See also Lucasfilm THX technical documentation 'Theatre Construction for the Digital Age' for detailed information on acoustic issues

Overview and opportunities

exhibitors have with distributors. If these opportunities are grasped, then a much wider range of cinema could be made available to a much larger number of cinemagoers – and in turn, increase the returns to specialist film distributors and producers. Many features routinely available on DVD releases – additional scenes, documentaries, interviews, out-takes – could be introduced at cinemas using digital technologies. Developing audiences for specialist films undoubtedly requires much greater effort from individual cinemas and their staff. The audit revealed limited opportunities for people seeking to develop these skills. There is a gap in the range of training courses available for cinema staff and aspiring programmers. Collaboration with organisations such as the Independent Cinema Office in London could create opportunities for this essential area of training to be developed further.

13.4 WHAT CAN BE LEARNED FROM EACH OTHER?

An important aim of this audit research has been to identify opportunities for coordinated schemes to develop the cinema sectors in Ireland and Wales, especially in market town and rural communities. The diversity of the cinema sector in both countries makes it difficult to generalise but several features merit specific attention.

13.4.1 What the cinema sector in Ireland can learn from Wales

- Local authority support – Many arts centre, multi-use venues (often theatres) and cultural cinemas are financially supported, or operated, by local authorities in Wales. Although cinema activity is rarely identified as a specific area for support, it is recognised as an important part of the overall cultural and leisure provision required for both the English and Welsh speaking population. This support has a beneficial impact on the sector in Wales.
- Arts centres – Cinema provision is often the key activity for arts centres and some multi-use venues, accounting for perhaps 75% or more of the performances. Venues such as Theatr Mwldan in Cardigan and Wyeside Arts Centre in Builth Wells provide excellent cinema facilities alongside a wide range of other performances and artforms. Most arts centres offer a mix of commercial and specialist programming and often participate in film festivals and education activities, including film-making workshops.
- Touring film festivals – The distinctive Wales One World Film Festival, and the nearby Borderlines Film Festival which takes place throughout Shropshire and Herefordshire with some screenings in Wales, is an excellent example of how specialised programming can be successfully delivered in a variety of venues – from city cinemas to rural venues.
- Disability access – For over a decade, UK legislation has influenced cinema building and redevelopment. As a result the cinema sector is now arguably the most accessible cultural/leisure sector in the UK. The Cinema Exhibitors' Association and the UK Film Council have played leading roles in developing accessibility guidelines and facilities for all types of cinema. This could offer a valuable model for the Irish sector.

13.4.2 What the cinema sector in Wales can learn from Ireland

- Commercial independents – The entrepreneurial spirit of commercial independent cinemas in Ireland has resulted in several mini-circuits and stand-alone cinemas which provide modern, good quality facilities in smaller towns throughout Ireland. Together with the larger Ward Anderson circuit, these operators provide good access to new release cinema in most parts of Ireland.
- Capital investment – The investment strategy provided by the recently formed Cultural Cinema Consortium is an important intervention which seeks to develop audiences for specialised films.
- Co-ordinated resources – The cinemobiles operated by the Irish Film Institute and Leitrim County Council, the 'access CINEMA' non-theatrical sector, and the Cultural Cinema Consortium are excellent examples of how resources can be co-ordinated centrally but delivered effectively throughout the country. In each instance a clear area of responsibility has been established and delivered.

- Mobile cinemas – Taking a mobile cinema with 35mm equipment, Dolby Stereo sound, and comfortable seating to small, often remote communities is an expensive and challenging activity. However the experience of these cinemas in Ireland (and in Scotland and France) shows that they can provide a valuable service for many communities. In addition to their regular touring activities, the Cinemobiles can complement festivals, community initiatives, education and training activities. West and mid-Wales may offer a suitable territory for such a service.

13.5 IF THERE IS NO INTERVENTION, WHAT WILL HAPPEN?

In certain respects the cinema sectors in both Ireland and Wales are in good health. However there are weak points. These include the uneven availability of specialist programming, the shortage of film education activities, the fragility of technical support services in some areas, and an absence of a clear digital cinema strategy. These vulnerabilities may require new interventions – by public and/or private sector agencies. Without intervention:

- There is a danger that the cinema sectors in both Ireland and Wales will fall behind the rest of the UK in the implementation of digital cinema.
- A number of independent, usually older, cinemas in smaller towns face an uncertain future. They lack funds to invest in their business and are being adversely affected by the rise of DVDs and changing release patterns.
- In Wales, pressure on local authorities and the impact of disability access legislation may lead to closure or reduction in activity at some older traditional cinemas, arts centres and multi-use venues in medium and smaller towns.
- In both countries, but particularly in Ireland, it is important not to miss opportunities to engage local authorities in cinema provision strategies. Efforts to demonstrate the economic, social and cultural value of local cinemas should be supported and promoted strongly to local authorities and to national government.
- There is an ever-present danger that local and national government will fail to acknowledge and understand the rich combination of commercial and cultural characteristics of cinema and as a result, sideline cinema development strategies.
- Outside of the main cinema circuits, technical support services may become both more difficult to obtain and more expensive. The cinema service engineer is a vital part of the sector and an invaluable source of technical information and on-site training for many projectionists.
- In specialist cinema, as in many artforms, it is increasingly difficult to recruit appropriately knowledgeable and skilled staff to programme and manage specialist cinemas. Both countries could collaborate on schemes designed to encourage people to enter the cinema industry and to develop their professional skills.
- Several attempts have been made over the years to find ways of allowing film festivals to collaborate, learn from one another, and to develop new ideas. The European Co-ordination of Film Festivals[68], formed in 1995 and with over 200 member festivals, is perhaps the longest running venture. Within each country, however, the absence of a coherent support and co-ordination mechanism for film festivals risks creating a fragmented sector in a relatively small marketplace.
- Film and moving image education activities in both countries lack significant support from national agencies and are therefore available on an uneven basis throughout both Ireland and Wales.

A number of these issues are address in the recommendations chapter.

[68] www.eurofilmfest.org. In Ireland the Cork, Dublin and Junior Dublin Film festivals are members of the ECFF. In Wales the Cardiff Screen Festival is a member. The ECFF mission is "to develop all forms of services and joint-projects that will strengthen our Members' promotion and circulation of the diversity of the European moving image: to develop exchanges, cooperation and the transfer of good practice between festivals; to encourage transnational partnerships between members; to seek global solutions to common problems; to increase the collective impact of festivals on the promotion and circulation of the European moving image; to promote the cultural dimension and socio-economic roles of festivals; to inform European and International institutions about activities and issues concerning festivals

Recommendations

The national overview of the Irish and Welsh cinema sectors at the start of this report outlined an industry which had grown strongly over the past decade. The main beneficiaries of this growth have been the capital cities and to a lesser extent, a few other large towns where modern multiplexes continue to be built and redeveloped. Other parts of both Ireland and Wales have fared poorly in comparison and the recommendations which follow are therefore mainly addressed at the situation outside Dublin and Cardiff.

14.1 TASK FORCE

This audit and research study was commissioned to provide data on the cinema sectors in Ireland and Wales. It is intended to provide a foundation for Sgrîn and the Arts Council to develop their future exhibition strategies, to strengthen and expand the sector in both countries and broaden and enhance programme choice for audiences.

It is our view that to be successful, such a strategy needs to be developed with, and influenced by, a range of key partners. This will establish a wide platform of engagement, seek to achieve shared ownership and enable Sgrîn and the Arts Council to engage with key players linked to industrial, cultural and local regeneration strategies.

Recommendation A

It's recommended that a high level Cinema Task Group should be established in both Ireland and Wales to review and take forward the findings and recommendations from this report.

At present Sgrîn, in particular, lacks sufficient resources to take forward exhibition and make the changes required to sustain and develop the sector. Without intervention and additional resources, as well as political support from the Welsh Assembly and others, the gaps in Welsh cinema provision are likely to become more acute. Support to take forward the findings of this research and develop an effective exhibition strategy should be secured through a Cinema Task Force.

The Task Force/s should include a small number of senior or executive level, experienced and knowledgeable individuals and organisations with the authority to act on developments. These may include organisations such as the Irish Film Board, distributors with a particular interest in Ireland and Wales, major and key exhibition representatives, high level local authority representation, the Cinema Exhibitors' Association and other relevant players. Both should be led at a senior level within Sgrîn and the Arts Council.

The Task Force should focus on objectives and outcomes, be task centred, launch a series of practical and achievable initiatives and act as an advocate for cinema in communities of differing sizes and interests. They should seek a wide platform of engagement with the sector, seek to build strategic partnerships and assist in making the case to the Irish Government and the Welsh Assembly for cinema.

Links should be maintained between the Task Forces in both Ireland and Wales. Collaborative ventures and initiatives, such as tours and programme packages, conferences and seminars etc, should be supported where appropriate.

14.2 CINEMA LOCATION AND SPATIAL STRATEGIES

The Irish and Welsh spatial strategies have identified a range of interconnecting social, cultural and economic opportunities which could have a substantial influence on the development of cinema exhibition in each country. These strategies provide a framework within which the aim of ensuring accessible, high quality and diverse cinema provision for residents and visitors can be debated and evaluated at various levels of government. They provide an important opportunity for cinema to be evaluated in terms which are wider reaching than private business or as a subsidised artform.

In recent years, new cinema building has returned to town centres after a historically brief period when out-of-town sites were in favour. While this is not a universal trend, there is undoubtedly a broad desire to see towns and cities with vibrant evening economies. Cinemas, along with other cultural, entertainment and leisure facilities provide much of the foundation for the life of town centres. The importance of the local cinema to residents in towns of all sizes was repeatedly reaffirmed throughout this study.

Recommendation B

It is recommended that cinema exhibition strategies in Ireland and Wales explicitly build on the relevant spatial strategies and town planning policies in order to ensure that the value and role of local cinemas can be demonstrated and discussed within local, regional and national government.

14.3 LOCAL GOVERNMENT PARTNERSHIP

The importance of cinema to local communities – as both a cultural and amenity resource - has been strongly emphasised throughout this research. (As has the role that cinema can play within national and regional spatial development). However, partnerships between local authorities and cinemas would seem to be underdeveloped thus missing opportunities to work to mutual benefit.

Cinema can contribute to and enhance the quality of life within towns, cities and rural areas. They have the potential to bring economic benefit, rich social, cultural and educational benefit and can provide additional tourism amenities, particularly in seaside towns and holiday locations. They can be an important part of town centre regeneration, provide landmark buildings and can enhance both day and evening economies.

Recommendation C

There is a need to encourage greater dialogue between local authorities and cinemas in both Ireland and Wales. It is recommended that this should be brokered by the Arts Council through their existing networks, and by Sgrîn in Wales (working in partnership with the Arts Council of Wales where appropriate) linked to the Cinema Task Force work.

A cross nation seminar could be organised highlighting the best case studies from both countries in terms of local authority/cinema partnerships. Much can be learned from the strong record of public sector cinema partnerships in Wales.

This dialogue should seek to build stronger partnerships, identify common agendas and areas of mutual collaboration, identify areas of synergy with local, regional and national spatial development strategies, and establish open lines of communication on issues such as disability access requirements, education provision, and planning. Impact assessment studies should be supported in key areas to build quantitative and qualitative data for future planning. This latter could be linked to work in academic institutions on impact studies.

14.4 CINEMA BUILDINGS

An important aspect of this study concerns the design and quality of cinema buildings. The experience of attending multiplexes, traditional cinemas and arts centre venues is widely different and policies aimed at cinema provision need to recognise that contemporary cinema audiences aspire to a certain quality and style of venue for their cinemagoing.

A striking aspect of the cinema sector in Ireland is the quantity of recently built cinemas, in nearly all instances custom built designs. Wales has benefited from a far smaller number of new, purpose built cinemas although a substantial number of arts centres have undergone major redevelopment and refurbishment during the past 10-15 years. This custom build boom in Ireland has resulted in good ‘in theatre’ functionality with unobstructed viewing, excellent sound, and comfortable seating but a lack of distinctive style once beyond the entrances and foyers. While this is in line with worldwide trends, it contrasts with the design quality of theatre and music hall auditoria which often feature innovative and attractive interior design.

Similarly the exterior design of many new cinema buildings is unremarkable, with the exception of

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entrance areas. A few notable exceptions do exist where architectural and design innovation has been applied to excellent effect, resulting in distinctive buildings which are landmarks in the town.

An increasingly important issue for cinemas and other public buildings is the requirement to make venues properly accessible to people with a range of disabilities, particularly mobility and sensory impairments. Recently built or redeveloped cinemas have incorporated lifts, ramps, handrails, tactile signage, inductive loops, and in a few instances, audio description facilities. In contrast older buildings, including arts centres or multi-use venues built before 1990, often have significant obstacles for people with disabilities to overcome. Good, technically detailed advice is available to assist cinemas to adapt their premises if required, but several venues do not have the financial resources to make the necessary changes.

In the UK, public funding for new cinema developments is increasingly difficult to secure and private sector developers have scaled down their cinema development proposals substantially.[69] The main focus of attention for many cinema exhibitors is refurbishment of their existing venues. First and second generation multiplexes are being refurbished to the latest standards while independent exhibitors are continuing to redevelop their cinemas when possible.

In Ireland the impact of new capital funding from the Cultural Cinema Consortium is only beginning to be felt but it has the potential to provide a critical impetus to the wider development of cultural cinema in the country. In Wales the opportunity to participate in the UK Film Council's Digital Screen Network (and the accompanying non-theatrical fund) provides more limited but nonetheless important opportunities.

Cinema exhibitors face a variety of issues in respect of their planned or existing buildings, and while legislation and current best practice affect many of the functional aspects of the venue, there is little encouragement for inspirational and innovative design which might raise cinema buildings to a level similar to theatres, arts centres, and other civic buildings.

Recommendation D

It is recommended that a series of measures are adopted with the specific aim of encouraging high quality design and architecture for new and redeveloped cinemas.

These measures may include:

(i) An international conference focussed on the issue of future trends in cinema design. The intention would be to make Ireland and Wales, perhaps in collaboration with other Celtic, UK or European nations, the focus for debates and seminars about cinema design.

(ii) The establishment of an awards programme in the UK and Ireland for architecture and design in cinemas and multi-purpose venues which incorporate cinema exhibition. The awards could be made every four years and be backed by one or more significant cash prizes for the architects/designers and the cinema owners.

(iii) Commissioning of a monograph which builds on this study and focuses on contemporary trends in cinema architecture and design within Ireland and/or Wales.

(iv) Consideration given to one or more schemes which make additional architectural resources available to cinema owners and developers in order to enhance the design quality of new or redeveloped cinemas.

14.5 ACCESS

Specific attention has been given to issues of accessibility throughout the study. Though the Irish and Welsh legislative frameworks differ, both Sgrîn and the Arts Council are committed to achieving best practice and the widest access for audiences.

Whilst a number of cinemas in both Ireland and Wales achieve a good standard in terms of access, it is clear

[69] Dodona Research, and other industry observers, have pointed out that cinema building is cyclical and that although there is a lull in activity at present, an upswing is anticipated within another 2-3 years. See UK Cinemagoing 12, 2004.

from the research that there are still a considerable number of cinemas in both countries where access is poor. Many, though not all, of these tend to be traditional cinema sites built before 1975.

Dissemination of information and best practice in relation to access issues is also limited. Opportunities are sometimes lost to share information on effective upgrades, successful renovation and access innovations. This could be addressed through seminars, conferences, newsletters and other means.

Recommendation E

It is recommended that active measures to profile work around improving accessibility should be agreed through the Welsh and Irish Cinema Task Forces. These should be developed in association with lead bodies such as the Cinema Exhibitors Association in the UK and equivalent organisations in Ireland. Cinemas in Ireland and Wales should be encouraged to implement 'best practice measures' within their buildings for people with mobility, sensory and other disabilities. The Task Force should work with local authorities to assist local cinemas which require modifications to meet access legislation in order to ensure that these valued local amenities remain operational.

14.6 PROGRAMME DEVELOPMENT

Opportunities to broaden programme choice, particularly outside the capital cities, was one of the aims of this research. Current evidence suggests that 'specialised' or 'cultural' programming is limited in both Ireland and Wales and that the provision of cinemas dedicated to specialist programming is extremely poor. In Ireland, the funding provided through the Cultural Cinema Consortium is likely to go some way to redressing this imbalance.

Recommendation F

i) **Ireland – It is strongly recommended that the Cultural Consortium capital fund in Ireland should cinema be maintained for the foreseeable future. Key centres identified in the Developing Cultural Cinema in Ireland research document should continue to be developed.**
ii) **Wales – It is recommended that the Welsh Task Force and Sgrîn consider the merits of establishing a Welsh capital fund – which secures new resources for cinemas in Wales. This should be additional to existing funding and should be seen to enhance and complement existing support.**

This research suggests that support for arts centres, film societies and mobile cinemas results in expanded programme choice and wider cinema provision for audiences, particularly outside the capital cities.

Recommendation G – Ireland

It is recommended that funding for arts centres, film societies and mobile cinemas, particularly centralised service provision through organisations such as 'access CINEMA', should be maintained and, where appropriate, expanded.

Recommendation H – Ireland and Wales

It is also recommended that additional measures to expand programme choice should be investigated including the provision of funding to develop programme packages, tours and joint marketing.

Initiatives like the Wales One World Festival, which tours to a number of arts centres and venues in Wales, offers a possible model which could be expanded. Other models include the access Cinemas Network which could be extended or replicated in Wales. In addition, services could be accessed from the Independent Cinema Office in the UK. Tours could include specialised programmes, Irish and Welsh packages, expanded festival tours or a number of variations.

What is important about these initiatives is that they provide services from a hub to a number of venues or organisations. They also encourage partnerships, sharing resources, assist venues with limited expertise or

Recommendations

resources, offer opportunities to negotiate favourable terms with distributors, and provide 'centralised' expertise. In order to maximise the benefits of such efforts, any such schemes should be promoted to the whole sector.

The provision of incentives or minimum guarantees should be explored where possible – with a clear return from participating venues in terms of marketing, publicity and a commitment to expanding programme choice - the Welsh Arts Council, *Night Out Scheme* may provide a model. Any such programme packages and initiatives must be supported by high level marketing and publicity and could be linked to training and development. The development of such packages could be advertised as a contract for services open to agencies and organisations including the Irish Film Institute, access CINEMA, the Independent Cinema Office, and others including commercial sector organisations. These initiatives should be explored more fully through the Cinema Task Group – see below.

14.7 FILM EDUCATION

This study found that education and programme enhancement linked to cinemas is underdeveloped in both Ireland and Wales. There are clearly a number of key organisations on the ground providing important services including the Irish Film Institute, Media Education Wales, Film Education in the UK and other organisations such as Valleys Arts Marketing and a number of festivals and other organisations. However, the reach of this work is limited, the understanding of formal and informal education within cinemas is underdeveloped and resources (funding) to support education work are limited. This clearly needs to be redressed.

A wide range of venues in both Ireland and Wales expressed an interest in developing education work – including arts centres, multiplexes and independent cinemas. Many felt that there was an untapped market for such work. However, this work is limited by lack of funding and resources and lack of connections and links with existing expertise and resources.

Recommendation I – Ireland & Wales

It is recommended that provision for education in both Ireland and Wales should be expanded. An education round table or working group should be established (separately in each country) tasked (on a time limited basis) with reviewing this area and developing practical proposals for expansion. This should include key individuals and organisations listed above, cinema representation and distributor involvement. It should link to the Irish government and Welsh Assembly work on education and curriculum development.

Similar contracts for services could be offered to develop a range of service, packages and materials but it is important that there is a breadth of provision across both countries. Consideration should be given to establishing 'hubs' which can support a number of venues or organisations rather than concentrating services in the capital cities which are distant from some venues.

14.8 STAFF DEVELOPMENT

The cinema sector is not a major employer in overall terms, but throughout Ireland and Wales there is a clear tendency to over-rely on a small number of committed, experienced, enthusiastic individuals, whether this is a dynamic marketing officer, an inspirational manager, a dedicated and knowledgeable projectionist, or any number of loyal and essential customer service ('floor') staff. During the audit we encountered many instances of a community, usually in less well resourced rural areas, relying on just one or two key individuals for their cinema provision.

In respect of technical knowledge, the considerable value of visiting service engineers was highlighted. In many smaller cinemas and arts centres, the technical staff obtain crucial training from the engineers during routine service visits or installation of new equipment. In a few instances in both Ireland and Wales, a multiplex has provided technical training and shared their expertise with another local cinema organisation.

The main issues facing the operators of cinemas, in all areas but particularly in small town and rural areas, are:

i) Recruitment and development of high quality cinema managers,

ii) Lack of access to appropriate training opportunities for a wide range of topics including new technologies, disability awareness, internet marketing, and working with schools and colleges, [70]

iii) Recruitment and retention of knowledgeable and experienced technical staff.

The major circuits are generally well equipped to provide high quality training for their staff but independent cinemas, including many not-for-profit organisations, do not have access to similar opportunities. This situation can be addressed in a number of ways and it is therefore recommended that:

Recommendation J

i) The major circuits are encouraged to work with the independent sector (commercial and not-for-profit) to provide high quality training to new recruits to the cinema sector.

ii) The national bodies – including SkillSet Cymru, Screen Training Ireland and the Independent Cinema Office – develop training courses and other schemes such as seminars or workshops specifically for the independent cinemas sectors. It may be possible to deliver some of these in collaboration with relevant equipment and service suppliers.

iii) An annual residential conference for the cinema sector should be organised in order to allow current issues to be debated and to allow training workshops to be provided[71]. In Ireland and Wales, and possibly extended to include Northern Ireland and Scotland where cinemas experience similar issues. In Wales, Sgrîn should take lead responsibility for organising the conference. The Irish Cinema Task Force should determine which agency should take lead responsibility for this initiative.

14.9 FILM DISTRIBUTION

Cinemas are the final part of the production-distribution-exhibition chain which brings creative endeavours to audiences throughout the world. Throughout this study, the relationship between distributors and exhibitors was a central concern of many cinema managers.

Although a considerable part of the relationship works well, the feelings of vulnerability that some exhibitors expressed as well as incomprehension over decisions made by distant head offices, recurred in both Ireland and Wales. The major grievances about distributors were:

i) For non-first run cinemas, an inability to secure a film booking sufficiently close to the national release date,

ii) For cinemas outside the major cities, the inflexible terms offered to cinemas which operate in a different environment from major multiplexes,

iii) For cinemas, the apparently high terms demanded for films which had yet to prove their box office potential (especially in respect of ‘franchise’ releases which in summer 2003 often failed to live up to expectations),

iv) A perceived inflexibility of attitude to specialist cinemas and not-for-profit exhibitors, many of which operate in remote and rural locations.

From the distributor’s point of view they have to consider the financial risks they are shouldering along with international distribution requirements and the fact that certain cinemas often return a minimal film rental.

The advent of digital film distribution along with the explosive growth in DVD sales and rental, points to a need to re-examine the distributor-exhibitor business model. It is widely believed that there is an increasing need to develop flexible and responsive methods of distributing, programming and marketing films which recognise that the cinema sector is not just one homogeneous industry.

Digital cinema technologies open up new possibilities for distributing films which otherwise have been broadly

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[70] The London-based Independent Cinema Office’s recent survey of cinemas throughout the UK found that 84% of respondents requested training in one or more areas, covering topics such as programming, education, disability awareness, and office technology

[71] The Arts Marketing Association’s annual 3-day conference in the UK or the South West (of England) Cinema Consortium conferences provide a useful models

Recommendations

ignored. Foreign language films, documentary films, special interest films, and locally produced films may all find a successful niche in the cinema marketplace[72]. Introducing additional programming strands from non-traditional distributors (including distribution directly by the film's producer) create challenges for the entire distributor-exhibitor model, including the role of the censor.

In recognition of the issues identified during this study and the changing circumstances brought about by digital cinema, it is recommended that:

Recommendation K

i) **The national cinema organisations (including the Society of Film Distributors, Cinema Exhibitors Association, UK Film Council) should facilitate a dialogue between distributors and cinema exhibitors in order to re-examine distribution practices with the aim of creating new, productive opportunities for cinemas in small town and rural areas. It would be appropriate to involve other UK film organisations in these debates.**

ii) **The opportunity to re-define the distributor-(censor)–exhibitor relationship for digital releases should constitute one of the key tasks undertaken by the Task Force outlined in Section 14.11 below.**

14.10 INFORMATION AND MONITORING

A striking aspect of this study has been the variability of the information available. There are many different sources of information, from box office performance, through to several different statistical surveys such as the UK Film Council's Statistical Yearbook, Screen Digest and Media Salles reports, and Dodona Research's annual Cinemagoing review.

However, there is no comprehensive directory of cinemas such as exist for theatres, arts centres, and galleries. In large part this is due to the fact that the majority of cinemas are private sector commercial businesses who see little benefit in contributing information to such a publication or database. The major beneficiaries of such information are likely to be public sector organisations including local authorities who may be involved with cinema exhibition or are about to participate in this sector.

While information and data is relatively easy to obtain for the cinema sector in Ireland, it is much more difficult in Wales where the data is generally combined with the rest of the UK or with the adjacent West of England region. This makes it difficult for a Welsh cinema sector to be monitored and evaluated.

The trends and performance of the mainstream cinema sectors are generally well documented but there is much less detail available for the specialist and not-for-profit sectors, nor do these cinemas tend to use industry standard benchmarks to evaluate their own performance.

Recommendation L

It is recommended that the Irish and Welsh Task Forces give consideration to producing an annual digest of information about the cinema sectors in Wales and Ireland – from multiplex through to film societies, mobile cinema and film festivals. This could be produced as a joint venture or on a country specific basis. Such publication/s would have similarities to the UK Film Council's Statistical Yearbook with the addition of a directory section[73].

This process should be linked to strong evaluation of current support programmes, project and revenue funding support and could link to the development of benchmarks for future advancement of the sector.

14.11 DIGITAL CINEMAS

Digital cinema became a reality with screenings of George Lucas's *Star Wars: Episode 1* in July 1999. In the five years since that milestone event, only 200 or so cinemas worldwide have been equipped to screen feature films using high definition digital video technology. But the pace of development is quickening, especially in the UK as a result of initiatives funded by the Lottery and the UK Film Council, and in Europe as a result of the European DocuZone project and other

[72] See for example the European DocuZone project which aims to distribute documentaries to cinemas equipped with high definition digital projectors.

[73] In the mid-1990s Scottish Screen published a similar review titled 'Scottish Screen Data'

initiatives supported by the MEDIA programme. To date there are no cinemas in either Ireland or Wales equipped to screen films digitally and there is a risk that both countries could miss out on the leading edge developments taking place in the rest of the UK and in several European countries. At the same time, the potential benefits of digital cinema technologies for non-metropolitan cinemas need to be championed. Strategies to facilitate the appropriate implementation of these technologies outside capital cities could result in dramatically revitalised cinema exhibition sectors in many smaller towns and communities throughout Ireland and Wales.

If specialist films, or even certain mainstream titles, are distributed exclusively in the digital format it will be necessary for arthouse and specialist cinemas to be appropriately equipped or their programme will suffer. Film festivals and special events in particular are likely to experience difficulties if digital equipment is not available.

The progress being made in several European countries with digital distribution and exhibition is welcome and offers a viable alternative to the Digital Cinema Initiative controlled by the major Hollywood studios. Ultimately it is hoped that compatible equipment will prevail and that the studios will accept a hierarchy of technical standards so that cinemas of differing sizes and resources can participate in D-cinema.

It is therefore recommended that:

Recommendation M

i) The Cultural Cinema Consortium in Ireland should give guidance and provide funding, perhaps in collaboration with other organisations such as the UK Film Council, for digital cinema equipment to be installed in cinemas, including arts centres, wishing to develop their programme and take advantage of the flexibility and new opportunities available with these technologies.

ii) Sgrîn should similarly endeavour to ensure that a reasonable proportion of cinemas in Wales benefit from the Digital Screen Network and the Digital Fund for Non-Theatrical Exhibition operated by the UK Film Council.

iii) More broadly, the national bodies should work to ensure that film distributors and cinema exhibitors collaborate to develop appropriate new programming and booking models which allow the benefits of digital technology – flexibility of scheduling, ability to retain a print for as long as the cinema wants, new avenues of programming – to be delivered to audiences.

iv) A seminar or workshop for cinema owners, programmers, distributors, critics and marketing departments should be organised to explore the new programming opportunities offered by digital cinema and hurdles to achieving success with non-traditional approaches to programming cinemas. The seminar should take place in both Ireland and in Wales during 2004-05 and be organised by the Arts Council and Sgrîn respectively. The aim of these events would be to revisit the traditional, multiplex dominated, paradigm of cinema programming.

Appendix 1

Survey questionnaire and photographic record
The cinema visits were arranged in advance with cinema owners or managers. Each visit lasted approximately 60 minutes and consisted of:

- a tour of the cinema (exterior and interior) during which a series of photographs were taken to record the location, architecture, design and operation of the cinema
- a structured interview with the owner or manager, based around a detailed questionnaire
- obtaining promotional brochures, leaflets and other materials produced by the cinema.

Questionnaire outline
The survey questionnaire was split into two sections as follows:

Part A : Buildings
This section consisted of a range of questions related to the cinema building, its location, its history, and a description of the facilities. It was not expected that every section would be relevant to every cinema since the study included historic buildings, multi-use buildings, as well as newly created purpose built cinemas.

A certain amount of the information in this section is similar to that shown on a typical cinema web site such as SCOOT or in a cinema directory. The specific section headings were:

> Identification and location (name, type of building, address, location description),
> Ownership (past and present owner/tenant),
> Significance and designation (architectural and visual importance, listing designation),
> History (when built, when major alterations carried out, and proposed future works),
> Description (site, number and type of auditoria, foyers, bars/cafés, etc, seating capacities, technical equipment, disability access, decorative features, architectural style),
> Condition (a broad assessment of the major spaces – by the cinema operator as well as by the consultants – along the lines of 'excellent/good/average/poor).

Part B : Operations
This section looked at the normal daily or weekly type of operation and aimed to identify key indicators of economic, social and cultural impact. Specific headings were:

> Cinema type (commercial, independent, etc, standard operation description, nearest competitors, cultural importance),
> Company type/status (plc, limited company, trust, charitable status, publicly funded),
> Staffing (numbers of f/t, p/t, casual, trainee and voluntary staff, job title of person in multi-arts venues who is responsible for the cinema, training issues),
> Programming and marketing (programme style, specialist activities, marketing activities, foyer and entrance description),
> Audiences (typical number of performances per week, annual attendance per screen, brief description of audience catchment area and recent audience trends),
> Tickets and booking (description of ticket prices and booking methods),
> Education and outreach (description of activities in these areas),
> Local economy (nearby leisure, proportion of cinema's spend with local suppliers),
> SWOT (brief comments on strengths, weaknesses, opportunities and threats),
> Overall impact (comments from cinema managers about impact of the cinema locally as well as comments about external impacts on the cinema).

A shortened version of the questionnaire was used for cinemas which were not visited by the consultants.

Photographic recording
Approximately 800 photographs were taken during the visits to the cinemas. Wherever appropriate, photographs were taken which illustrated the location of the cinema, the façade, the foyer, at least one auditorium, and the projection room. Additional photographs were often taken of concession sales areas and/or cafés; distinctive interior decoration; exterior views of the main bulk of the building; and specific features relating to disability access.

Organisation interviews
Interviews – in person or by telephone – were structured according to the organisation being consulted. The main areas of discussion were:
- Key strengths and weaknesses of the cinema sector in Ireland and Wales from the organisation's point of view
- Main threats and opportunities or challenges
- How do organisations think some of the main weaknesses can be overcome? What would make a difference in the medium to long term? What could be improved?
- Scope for partnership in future initiatives on cinema exhibition in Ireland and Wales

Local authorities
The role of local authorities in cinema provision is a key concern of this research project and a specific set of questions was submitted to arts officers (or equivalent) in both Ireland and Wales. The issues we sought information and comment on were:
- The range and quality of cinema provision in the local authority area,
- The architectural quality and condition of the cinema buildings,
- The opportunities for broadening the range of films shown in cinemas in the area,
- Details of any confirmed proposals for developing new cinemas or redeveloping existing cinemas,
- The potential for collaborative projects or networks to be established within each country and between the two countries in order to enhance the cinema sectors in both countries (e.g. training, marketing and architectural initiatives),
- Opportunities to develop film education activities for audiences of all ages,
- Any specific issues currently facing cinemas in the specific local authority area.

Supplementary issues
While the motives for this study are primary concerned with raising cinema up the cultural agenda in Ireland and Wales, several supplementary issues were of particular concern and were given attention during the field visits.

Architecture
A wide range of venues operate as full or part-time cinemas in both Ireland and Wales. The majority of venues visited were designed initially as cinemas although a number of conversions and adaptations were included – public halls, theatres, historic churches and barns.

In addition to a photographic recording of each venue, the research aims to identify examples of innovative and good practice in contemporary cinema design, whether for a single auditorium within an arts centre or other complex, or a multi-screen circuit multiplex. Exterior style and image, foyer and auditorium design, and distinctive features were documented wherever possible.

Access
The impact of disability access legislation is causing considerable concern for some cinemas and arts centres, especially those in older or adapted buildings which typically have a considerable number of staircases and structural problems to overcome in order to make the buildings properly accessible.

The audit survey included questions about the provision of facilities and services for people with mobility and sensory disabilities.

Training
Anecdotal evidence that a substantial number of cinemas in both countries relied excessively on a few highly experienced members of staff was investigated. Training initiatives and needs were explored with the cinema managers and owners.

Appendix 2

CINEMAS IN IRELAND							
Cinema	Town	County	Inter-reg	Type	Screens	Seats	Built
Ormonde	Arklow	Wicklow	Y	Commercial	2	260	
IMC	Athlone	Westmeath	N	Multiplex	6	1,078	1995-2004
The Reel Picture	Ballincollig	Cork	N	Multiplex	6	1,277	1995-2004
Abbey Centre Cinema	Ballyshannon	Donegal	N	Multi-use venue	3	524	1945-1974
UCI Blanchardstown	Blanchardstown	Dublin	Y	Multiplex	9	2,492	1995-2004
Cineplex	Bray	Wicklow	Y	Commercial	7	900	1995-2004
The Cinema Buncrana	Buncrana	Donegal	N	Commercial	1	281	
Cineplex	Bundoran	Donegal	N	Independent multiplex	6	926	1995-2004
Carlow Cineplex	Carlow Town	Carlow	Y	Commercial	3	520	1985-1994
Gaiety	Carrick-on-Shannon	Leitrim	N	Independent commercial	1	135	Before 1945
Mayo Movieworld	Castlebar	Mayo	N	Independent multiplex	7	1,020	1995-2004
Storm Cinemas	Cavan Town	Cavan	N	Independent commercial	4	775	
The Park Cinema	Clonakilty	Cork	N	Independent commercial	3	510	1995-2004
Omniplex	Clonmel	Tipperary - South	Y	Multiplex	5	782	1995-2004
UCI Coolock	Coolock	Dublin	Y	Multiplex	10	2,288	1985-1994
Capitol Cineplex	Cork City	Cork	N	Commercial	6	1,021	
Kino	Cork City	Cork	N	Independent commercial	1	188	1995-2004
The Gate Multiplex	Cork City	Cork	N	Independent multiplex	6	1,084	1995-2004
Phoenix	Dingle	Kerry	N	Independent commercial	1	152	Before 1945
Cinema World	Douglas Village	Cork	N	Multiplex	5	1,152	1985-1994
Omniplex	Drogheda	Louth	N	Multiplex	6	785	1995-2004
Irish Film Institute	Dublin City	Dublin	Y	Independent public funded	2	375	1985-1994
Savoy	Dublin City	Dublin	Y	Commercial	6	1,984	Before 1945
Screen	Dublin City	Dublin	Y	Commercial	3	783	1945-1974
Stella Cinema	Dublin City	Dublin	Y	Independent commercial	2	460	
Ster Century	Dublin City	Dublin	Y	Multiplex	14	3,568	1995-2004
UGC Cinemas	Dublin City	Dublin	Y	Multiplex	17	3,361	1995-2004
IMC	Dun Laoghaire	Dublin	Y	Multiplex	12	1,833	1995-2004
IMC	Dundalk	Louth	N	Multiplex	7	1,211	1995-2004
Ormonde	Dungarvan	Waterford	Y	Independent commercial	2	294	Before 1945
Broadway	Dunmanway	Cork	N	Independent commercial	1	280	1945-1974
Empire Movieplex	Ennis	Clare	N	Commercial	6	975	1995-2004
Slaney Plaza	Enniscorthy	Wexford	Y	Independent commercial	3	523	1995-2004

Cinema	Town	County	Inter-reg	Type	Screens	Seats	Built
Omniplex	Galway City	Galway	N	Multiplex	11	2,020	1985-1994
Screen by the Sea	Greystones	Wicklow	Y	Independent commercial	1	120	Before 1945
Cosey Midiplex	Kanturk	Cork	N	Independent commercial	3	248	Before 1945
Cineplex	Kilkenny City	Kilkenny	Y	Commercial	4	808	1995-2004
Cineplex	Killarney	Kerry	N	Commercial	4	848	1995-2004
Century Cinema	Letterkenny	Donegal	N	Independent multiplex	6	910	1995-2004
Cineplex	Lifford	Donegal	N	Independent commercial	4	714	
Omniplex	Limerick City	Limerick	N	Multiplex	12	1,832	1995-2004
Savoy 2	Limerick City	Limerick	N	Commercial	1		1985-1994
Classic Cinema	Listowel	Kerry	N	Independent commercial	3	249	
Cineplex	Longford Town	Longford	N	Commercial	4	681	1995-2004
The Reel Picture	Mallow	Cork	N	Independent commercial	4	446	1995-2004
Ormonde	Middleton	Cork	N	Independent commercial	2	328	1945-1974
Diamond Cinema	Monaghan	Monaghan	N	Independent commercial	4	770	
IMC	Mullingar	Westmeath	N	Multiplex	6	1,032	1995-2004
Dara Cinema	Naas	Kildare	Y	Independent commercial	2	450	
Diamond Cinema	Navan	Meath	Y	Independent multiplex	6	935	1995-2004
Ormonde Cinema	Nenagh	Tipperary	N	Independent commercial	2	270	
Oscar Cinema	Newbridge (Droichead Nua)	Kildare	Y	Independent commercial	3	338	1945-1974
Storm Cinemas	Port Laoise	Laois	N	Independent multiplex	5	709	1995-2004
Omniplex	Santry	Dublin	Y	Multiplex	10	2,262	1985-1994
Gaiety Cinema	Sligo Town	Sligo	N	Independent multiplex	12	1,381	Before 1945
Ormonde	Stillorgan	Dublin	Y	Commercial	7	1,018	1975-1984
UCI Tallaght	Tallaght	Dublin	Y	Multiplex	12	2,759	1985-1994
Capitol Cinema	Thurles	Tipperary - North	N	Independent commercial	3	401	
Excel Centre	Tipperary Town	Tipperary - South	Y	Multi-use venue	3	606	1995-2004
Omniplex	Tralee	Kerry	N	Commercial	4	919	
Omniplex	Tullamore	Offaly	N	Multiplex	6	970	1995-2004
Cineplex	Waterford Town	Waterford	Y	Multiplex	5	999	1985-1994
Cineplex	Wexford Town	Wexford	Y	Commercial	3	622	1985-1994
Regal Cinema	Youghal	Cork	N	Independent commercial	3	290	Before 1945
64 cinemas			**26 Y**		**328**	**59,732**	

Appendix 3

CINEMAS IN WALES							
Cinema	**Town**	**County**	**Inter-reg**	**Type**	**Screens**	**Seats**	**Built**
Coliseum Theatre	Aberdare	Rhondda Cynon Taff	N	Multi-use venue	1	600	Before 1945
Aberystwyth Arts Centre	Aberystwyth	Ceredigion	Y	Multi-use venue	1	125	1945-1974
Commodore Cinema	Aberystwyth	Ceredigion	Y	Independent commercial	1	410	1975-1984
Neuadd Buddug	Bala	Gwynedd	Y	Multi-use venue	1	283	Before 1945
Plaza Apollo Cinema	Bangor	Gwynedd	Y	Commercial	2	352	Before 1945
Theatr Gwynedd	Bangor	Gwynedd	Y	Multi-use venue	1	348	1945-1974
Theatre Royal	Barry	Vale of Glamorgan	N	Independent commercial	2	599	Before 1945
Neuadd Ogwen	Bethesda	Gwynedd	Y	Independent commercial	1	315	
Blackwood Miners Institute	Blackwood	Caerphilly	N	Multi-use venue	1	409	Before 1945
Blaenavon Workmens Hall	Blaenavon	Torfaen	N	Multi-use venue	1	81	Before 1945
Coliseum Cinema	Brecon	Powys	N	Independent commercial	2	328	
Odeon Bridgend	Bridgend	Bridgend	N	Multiplex	9	2,100	1995-2004
Public Hall	Brynamman	Carmarthenshire	Y	Independent commercial	1	838	Before 1945
Market Hall Cinema	Brynmawr	Blaenau Gwent	N	Independent public funded	1	320	Before 1945
Wyeside Arts Centre	Builth Wells	Powys	N	Multi-use venue	2	409	Before 1945
Chapter Arts Centre	Cardiff	Cardiff	N	Multi-use venue	2	284	1945-1974
Ster Century Cinemas	Cardiff	Cardiff	N	Multiplex	14	3,405	1995-2004
UCI Cardiff Bay	Cardiff	Cardiff	N	Multiplex	12	2,675	
UGC Cardiff	Cardiff	Cardiff	N	Multiplex	15	3,424	1995-2004
Theatr Mwldan	Cardigan	Ceredigion	Y	Multi-use venue	2	396	1985-1994
Lyric Theatre	Carmarthen	Carmarthenshire	Y	Multi-use venue	1	740	
Public Hall	Cross Hands	Carmarthenshire	Y	Multi-use venue	1	300	Before 1945
Theatr y Gromlech	Crymych	Pembrokeshire	Y	Multi-use venue	1	208	Before 1945
Cwmaman Institute	Cwmaman	Rhondda Cynon Taff	N	Multi-use venue	1	344	Before 1945
Scene Cinema	Cwmbrân	Torfaen	N	Independent commercial	3	310	
Theatr Gwaun	Fishguard	Pembrokeshire	Y	Multi-use venue	1	188	Before 1945
Theatr Ardudwy	Harlech	Gwynedd	Y	Multi-use venue	1	266	1945-1974
Palace Cinema	Haverfordwest	Pembrokeshire	Y	Independent commercial	2	500	Before 1945
Canolfan Ucheldre Centre	Holyhead	Ynys Môn	Y	Multi-use venue	1	170	Before 1945
Empire Cinema	Holyhead	Ynys Môn	Y	Independent commercial	1	160	Before 1945

Cinema	Town	County	Inter-reg	Type	Screens	Seats	Built
Cineworld Llandudno	Llandudno Junction	Conwy	Y	Multiplex	9	1,600	1995-2004
Llanelli Entertainment Centre	Llanelli	Carmarthenshire	Y	Multi-use venue	3	948	Before 1945
Torch Theatre	Milford Haven	Pembrokeshire	Y	Multi-use venue	1	297	1975-1984
Theatr Clwyd	Mold	Flintshire	N	Multi-use venue	1	131	1975-1984
Savoy Theatre	Monmouth	Monmouthshire	N	Independent commercial	1	450	
Cardiff (Nantgarw) Showcase Cinemas	Nantgarw	Rhondda Cynon Taff	N	Multiplex	12	2,604	
City Cinema	Newport	Newport County	N	Independent commercial	3	706	1945-1974
UGC Newport	Newport	Newport County	N	Multiplex	13	2,851	1995-2004
Regent Cinema	Newtown	Powys	N	Independent commercial	2	248	
Pontardawe Arts Centre	Pontardawe	Swansea	N	Multi-use venue	1	340	1995-2004
Scala Cinema	Pontypool	Torfaen	N	Independent commercial	1	114	
Muni Arts Centre	Pontypridd	Rhondda Cynon Taff	N	Multi-use venue	1	355	
Apollo Cinema	Port Talbot	Neath Port Talbot	N	Multiplex	6	973	1995-2004
Coliseum Cinema	Porthmadog	Gwynedd	Y	Independent commercial	1	582	Before 1945
Neuadd Dwyfor	Pwllheli	Gwynedd	Y	Multi-use venue	1	354	Before 1945
Apollo Cinemas	Rhyl	Denbighshire	Y	Multiplex	5	743	1995-2004
St Donats Arts Centre	St Donats	Vale of Glamorgan	N	Multi-use venue	1	217	1975-1984
Taliesin Arts Centre	Swansea	Swansea	N	Multi-use venue	1	326	1975-1984
UCI Swansea	Swansea	Swansea	N	Multiplex	10	2,052	1985-1994
Royal Playhouse Cinema	Tenby	Pembrokeshire	Y	Independent commercial	1	479	
The Phoenix Centre	Ton Pentre	Rhondda Cynon Taff	N	Multi-use venue	1	322	
Park & Dare Theatre	Treorchy	Rhondda Cynon Taff	N	Multi-use venue	1	794	
Welfare Hall	Tylorstown	Rhondda Cynon Taff	N	Multi-use venue	1		Before 1945
Tywyn Cinema	Tywyn	Gwynedd	Y	Independent commercial	1	363	
Pola Cinema	Welshpool	Powys	N	Independent commercial	2	200	Before 1945
Odeon Wrexham	Wrexham	Wrexham	N	Multiplex	7	1,283	1995-2004
The Welfare	Ystradgynlais	Powys	N	Multi-use venue	1	345	
57 cinemas			**24 Y**		**173**	**40,564**	

Appendix 4

CINEMAS IN IRELAND

Venue	Operator	Town	County	Tel Admin	Tel Box Office	Web
Ormonde	Ward Anderson	Arklow	Wicklow			
IMC	Ward Anderson	Athlone	Westmeath	00 353 902 76655	00 353 902 76655	
The Reel Picture	Reel Picture Cinemas	Ballincollig	Cork	00 353 21 487 6300	00 353 21 487 6300	www.thereelpictures.com
Abbey Centre Cinema	Abbey Centre Trust	Ballyshannon	Donegal	00 353 71 9851375	00 353 71 985 2928	www.abbeycentre.net
UCI Blanchardstown	UCI Cinemas	Blanchardstown	Dublin	00 353 1 812 8383		
Cineplex	Michael Collins	Bray	Wicklow		00 353 1 286 8686	
The Cinema Buncrana		Buncrana	Donegal			www.thecinemabuncrana.com
Cineplex	Bundoran Cineplex Ltd	Bundoran	Donegal	00 353 71 982 9999		www.cineplexbundoran.com
Carlow Cineplex	Ward Anderson	Carlow Town	Carlow			
Gaiety	Gerry Kelly	Carrick-on-Shannon	Leitrim	00 353 71 96 21869		www.stormcavan.com
Mayo Movieworld	Ruth & Graham Spurling	Castlebar	Mayo	00 353 94 27777		www.mayomovieworld.net
Storm Cinemas	Storm Cinemas	Cavan Town	Cavan	00 353 49 437 2005		
The Park Cinema	Reel Picture Cinemas	Clonakilty	Cork	00 353 23 34141		www.theparkcinema.ie
Omniplex	Ward Anderson	Clonmel	Tipperary - South	00 353 52 27353	00 353 52 27722	
UCI Coolock	UCI Cinemas	Coolock	Dublin	00 353 1 848 5122		
Capitol Cineplex	Ward Anderson	Cork City	Cork	00 353 21 427 8777		
Kino	Michael Hannigan	Cork City	Cork	00 353 21 427 1571		www.kinocinema.net/
The Gate Multiplex	Cork Cinemas	Cork City	Cork	00 353 21 427 9595		www.corkcinemas.com
Phoenix	Michael O'Sullivan	Dingle	Kerry	00 353 66 9151222		
Cinema World	Cork Cinemas	Douglas Village	Cork	00 353 21 489 5900	00 353 21 489 5959	www.corkcinemas.com
Omniplex	Ward Anderson	Drogheda	Louth		00 353 41 44007	
Irish Film Institute	Irish Film Institute	Dublin City	Dublin	00 353 1 679 5744	00 353 1 679 3477	www.fii.ie
Savoy	Ward Anderson	Dublin City	Dublin	00 353 1 874 8811	00 353 1 874 6000	
Screen	Ward Anderson	Dublin City	Dublin		00 353 1 672 5500	
Stella Cinema	Tony O'Grady	Dublin City	Dublin		00 353 1 497 1281	www.stella-rathmines.net
Ster Century	Ster Century Cinemas	Dublin City	Dublin	00 353 6055705		
UGC Cinemas	UGC cinemas	Dublin City	Dublin	00 353 1 872 8444		www.ugc.ie
IMC	Ward Anderson	Dun Laoghaire	Dublin	00 353 1 280 7777	00 353 230 1399	
IMC	Ward Anderson	Dundalk	Louth	00 353 42 34843	00 353 42 932 0400	
Ormonde	Ruth & Graham Spurling	Dungarvan	Waterford	00 353 58 41021		www.ormondecinemadungarvan.com
Broadway	Barry Deane	Dunmanway	Cork	00 353 23 45181		www.broadwaycinema.net
Empire Movieplex	Aidan Woodford	Ennis	Clare	00 353 65 682 1742	00 353 65 682 0181	www.empiremovieplex.net

Slaney Plaza	Ruth & Graham Spurling	Enniscorthy	Wexford	00 353 54 37066		www.slaneyplaza.net/nsmain.html
Omniplex	Ward Anderson	Galway City	Galway	00 353 91 566 771	00 353 91 566 311	www.filminfo.net
Screen by the Sea	Ruth & Graham Spurling	Greystones	Wicklow	00 353 01 2871143		www.screengreystones.net
Cosey Midiplex	Michael O'Riordan	Kanturk	Cork	00 353 29 50328		
Cineplex	Ward Anderson	Kilkenny City	Kilkenny	00 353 56 23111		
Cineplex	Ward Anderson	Killarney	Kerry	00 353 64 37007		
Century Cinema	Paul McGlinchey	Letterkenny	Donegal	00 353 74 9125050	00 353 74 9121976	www.letterkennycinema.net
Cineplex		Lifford	Donegal	00 353 74 914 1963		www.liffordstrabane.com
Omniplex	Ward Anderson	Limerick City	Limerick	00 353 61 305 007	00 353 61 305 305	
Savoy 2	Ward Anderson	Limerick City	Limerick	00 353 61 311 900	00 353 61 311 911	
Classic Cinema		Listowel	Kerry		00 353 68 22 796	www.listowel-cinema.com
Cineplex	Ward Anderson	Longford Town	Longford		00 353 43 45999	
The Reel Picture	Reel Picture Cinemas	Mallow	Cork	00 353 22 50099	00 353 21 487 6300	www.thereelpictures.com
Ormonde	Greene Cinemas	Middleton	Cork			www.ormondemiddleton.com
Diamond Cinema	Diamond Cinemas	Monaghan	Monaghan		00 353 47 84755	www.diamondmonaghan.com
IMC	Ward Anderson	Mullingar	Westmeath		00 353 44 48353	
Dara Cinema	Fran McCormack	Naas	Kildare	00 353 45 897 382	00 353 87 659 3369	www.daracinema.com
Diamond Cinema	Diamond Cinemas	Navan	Meath	00 353 46 907 4755	00 353 46 907 4756	www.diamondnavan.com
Ormonde Cinema		Nenagh	Tipperary	00 353 67 31363		www.ormondenenagh.com
Oscar Cinema	Michael Roycroft (Night Out Entertainments Ltd)	Newbridge (Droichead Nua)	Kildare	00 353 45 431 284		www.oscarnewbridge.net
Storm Cinemas	Storm Cinemas	Port Laoise	Laois	00 353 50 26 26 26		
Omniplex	Ward Anderson	Santry	Dublin		00 353 1 842 8844	
Gaiety Cinema	The Gaiety (Sligo) Ltd	Sligo Town	Sligo	00 353 71 916 2651	00 353 71 917 4001	www.gaietysligo.com
Ormonde	Andy O'Gorman / LAD Enterprises ?	Stillorgan	Dublin	00 353 1 707 4103	00 353 1 707 4100	www.ormondecinemas.com
UCI Tallaght	UCI Cinemas	Tallaght	Dublin	00 353 1 459 8500		
Capitol Cinema		Thurles	Tipperary - North		00 353 50 421554	www.capitol-thurles.net
Excel Centre	Tipperary Excel Heritage Co Ltd	Tipperary Town	Tipperary - South	00 353 62 80520		www.tipperary-excel.com
Omniplex	Ward Anderson	Tralee	Kerry		00 353 66 7127700	
Omniplex	Ward Anderson	Tullamore	Offaly		00 353 50 622800	
Cineplex	Ward Anderson	Waterford Town	Waterford	00 353 51 874595		www.filminfo.net
Cineplex	Ward Anderson	Wexford Town	Wexford	00 353 53 22321		www.filminfo.net
Regal Cinema	Harry Hurst	Youghal	Cork	00 353 24 91399		

Appendix 5

CINEMAS IN WALES

Venue	Operator	Town	County	Tel Admin	Tel Box Office	Web
Coliseum Theatre	Rhondda Cynon Taff County Borough Council	Aberdare	Rhondda Cynon Taff	00 44 1685 882380	00 44 1685 881188	www.coliseum-aberdare.co.uk
Aberystwyth Arts Centre	University of Wales	Aberystwyth	Ceredigion	00 44 1970 622882	00 44 1970 623232	www.aber.ac.uk/~arcwww/
Commodore Cinema	Michael Davies Partnership	Aberystwyth	Ceredigion	00 44 1970 612421		www.commodorecinema.co.uk/
Neuadd Buddug	Gwynedd County Council	Bala	Gwynedd	00 44 1678 520 800	00 44 1678 520800	
Plaza Apollo Cinema	Apollo Cinemas	Bangor	Gwynedd	00 44 1248 364807	00 44 9062 943456	www.apollocinemas.co.uk/bangor.html
Theatr Gwynedd	University College Wales, Bangor	Bangor	Gwynedd	00 44 1248 351707	00 44 1248 351708	www.theatrgwynedd.com
Theatre Royal	Circle Cinemas Ltd	Barry	Vale of Glamorgan	00 44 1446 735019		www.circlecinemas.co.uk
Neuadd Ogwen		Bethesda	Gwynedd	00 44 1248 600251	00 44 1286 676335	
Blackwood Miners Institute	Caerphilly County Brough Council	Blackwood	Caerphilly	00 44 1495 224425	00 44 1495 227206	www.lookinglocal.co.uk/blackwood/institute2.htm
Blaenavon Workmens Hall		South Wales Cinemas	Blaenavon	Torfaen	00 44 1495 792661	www.southwalescinemas.co.uk
Coliseum Cinema		Brecon	Powys	00 44 1874 622501	00 44 1874 622502	www.coliseumbrecon.co.uk
Odeon Bridgend	Odeon Cinemas	Bridgend	Bridgend	00 44 1656 663014	00 44 1656 647476	
Public Hall	Brynaman Public Hall Trustees	Brynamman	Carmarthenshire	00 44 1269 82 3232		
Market Hall Cinema	Blaenau Gwent County Borough Council	Brynmawr	Blaenau Gwent	00 44 1495 310576		www.blaenau-gwent.gov.uk/bgvew/cinema.htm
Wyeside Arts Centre	Wyeside Arts Centre Ltd	Builth Wells	Powys	00 441982 553668	00 44 1982 552555	www.wyeside.co.uk
Chapter Arts Centre	Chapter (Cardiff) Ltd	Cardiff	Cardiff	00 44 29 2031 1050	00 44 29 2030 4400	www.chapter.org
Ster Century Cinemas	Ster Century Cinemas	Cardiff	Cardiff	00 44 29 20550500	00 44 29 20550515	www.stercentury.co.uk
UCI Cardiff Bay	UCI Cinemas	Cardiff	Cardiff	00 44 29 20442200	00 44 8700 102030	
UGC Cardiff	UGC Cinemas	Cardiff	Cardiff	00 44 2920 667718	00 44 870 9070739	www.ugccinemas.co.uk
Theatr Mwldan	Theatr Mwldan	Cardigan	Ceredigion	00 44 1239 612687	00 44 1239 621200	www.mwldan.co.uk
Lyric Theatre	Lyric Theatre Trust (Carmarthen) Ltd	Carmarthen	Carmarthenshire	00 44 1267 238685	00 44 1267 236853	www.carmarthenonline.co.uk/lyric/
Public Hall	Cross Hands Public Hall Management Cmtt	Cross Hands	Carmarthenshire	00 44 1269 844441		
Theatr y Gromlech	Pembrokeshire County Council	Crymych	Pembrokeshire	00 44 1239 831455		
Cwmaman Institute	Cwmaman Public Hall and Institute Ltd	Cwmaman	Rhondda Cynon Taff	00 44 1685 876003	00 44 1685 887 101	www.cwmamaninstitute.co.uk OR www.cwmamantheatre.tk
Scene Cinema	South Wales Cinemas	Cwmbrân	Torfaen	00 44 1633 866621	00 44 1633 866621	www.southwalescinemas.co.uk
Theatr Gwaun	Pembrokeshire County Council	Fishguard	Pembrokeshire	00 44 1348 873421	00 44 1348 873421	www.theatrgwaun.co.uk

Theatr Ardudwy		Harlech	Gwynedd	00 44 1766 780667	00 44 1766 780667	www.theatrardudwy.co.uk
Palace Cinema		Haverfordwest	Pembrokeshire	00 44 1437 767675	00 44 1437 767675	www.palacehaverfordwest.co.uk
Canolfan Ucheldre Centre	Ucheldre Centre	Holyhead Friends Association	Ynys Môn	00 44 1407 763361		www.ucheldre.org
Empire Cinema	South Wales Cinemas	Holyhead	Ynys Môn	00 44 1407 761458		www.empireholyhead.co.uk or www.southwalescinemas.co.uk
Cineworld Llandudno	Cine-UK	Llandudno Junction	Conwy	00 44 1492 573218	00 44 1492 574910	www.cineworld.co.uk
Llanelli Entertainment Centre	Carmarthenshire County Council	Llanelli	Carmarthenshire	00 44 1554 774057	00 44 1554 774057	
Torch Theatre	Torch Theatre	Milford Haven	Pembrokeshire	00 441646 694 192	00 44 1646 695 267	www.torchtheatre.org
Theatr Clwyd	Flintshire County Council	Mold	Flintshire	00 441352 756331	00 44 1352 755114	www.clwyd-theatr-cymru.co.uk
Savoy Theatre		Monmouth	Monmouthshire	00 44 1600 772467		www.savoytheatremonmouth.co.uk
Showcase Cinemas Cardiff (Nantgarw)	National Amusements (UK) Ltd - Showcase Cinemas	Rhondda Cynon Taff Nantgarw		00 44 1443 844 437	00 44 1443 846 900	www.showcasecinemas.co.uk
City Cinema	South Wales Cinemas	Newport	Newport County	00 44 1633 224040	00 44 1633 224040	www.metro-cinema.co.uk
UGC Newport	UGC Cinemas	Newport	Newport County	00 44 1633 279673		www.ugccinemas.co.uk
Regent Cinema		Newtown	Powys	00 44 1686 625917		www.regentnewtown.co.uk
Pontardawe Arts Centre	Neath Port Talbet County Brough Council - Education, Leisure & Lifelong Learning Directorate	Pontardawe	Swansea	00 44 1792 863722	00 44 1792 863722	www.neathporttalbot.gov.uk/pon tardaweartscentre
Scala Cinema	South Wales Cinemas	Pontypool	Torfaen	00 44 1495 756038		www.southwalescinemas.co.uk
Muni Arts Centre	Muni Arts Centre	Pontypridd	Rhondda Cynon Taff	00 44 1443 485934		www.muniartscentre.co.uk
Apollo Cinema	Apollo Cinemas	Port Talbot	Neath Port Talbot	00 44 1639 897002	00 44 1639 895552	www.apollocinemas.co.uk
Coliseum Cinema	Coliseum Cinema - Independent	Porthmadog	Gwynedd	00 44 1766 512108		www.coliseum-porthmadog.co.uk
Neuadd Dwyfor	Gwynedd County Council	Pwllheli	Gwynedd	00 44 1758 704088		
Apollo Cinemas	Apollo Cinemas	Rhyl	Denbighshire	00 44 1745 353856	00 44 870 444 3146	
St Donats Arts Centre	St Donats Arts Centre	St Donats	Vale of Glamorgan	00 44 1446 799099	00 44 1446 799100	
Taliesin Arts Centre	University of Wales Swansea	Swansea	Swansea	00 44 1792 295238	00 44 1792 296883	www.taliesinartscentre.co.uk
UCI Swansea	UCI Cinemas	Swansea	Swansea	00 44 1792 644980	00 44 870 010 2030	www.uci.co.uk
Royal Playhouse Cinema	Royal Playhouse Cinema	Tenby	Pembrokeshire	00 44 1834 844 809		
The Phoenix Centre	Rhondda Community Business Ltd	Ton Pentre	Rhondda Cynon Taff	00 44 1443 425894	00 44 1443 485942	
Park & Dare Theatre		Treorchy	Rhondda Cynon Taff		00 44 1443 775654	
Welfare Hall		Tylorstown	Rhondda Cynon Taff		00 44 1443 730534	
Tywyn Cinema		Tywyn	Gwynedd	00 44 1654 710260		
Pola Cinema		Welshpool	Powys	00 44 1938 555715		
Odeon Wrexham	Odeon Cinemas	Wrexham	Wrexham	00 44 1978 310656		
The Welfare		Ystradgynlais	Powys	00 44 1639 843163		

Appendix 6

Arts Council – Revenue Funded Clients (Film) – Figures in Euros		
Organisation name	**2003**	**2004**
Resource organisation		
Access Cinema	87,400	110,000
Cork Film Centre	71,250	77,000
Film Base	117,000	137,000
Fis na Milaoise (Cinemobile)	-	15,000
Galway Film Resource Centre	90,780	95,000
Irish Film Institute	522,500	600,000
Screen Directors Guild of Ireland	-	10,000
Production Companies		
Young Irish Film Makers	49,000	60,000
Festivals		
Cork International Film Festival	160,000	190,000
Darklight Film Festival	12,000	12,000
Dublin International Film Festival	25,000	38,000
Dublin Lesbian and Gay Film Festival	5,000	8,000
Fresh Film Festival	12,000	18,000
Galway Film Fleadh	140,000	170,000
Total	**1,291,930**	**1,540,000**

ORIGIN DESIGN

Published October 2004
ISBN: 1-904291-11-2

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