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The Seat of Bob Parr's Pants 2: Intuition, programming and local cinema audiences

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Abstract:
This is the second of two articles examining relationships of exhibition through a study of Wallis Cinemas, a privately-owned cinema circuit in Adelaide. Both articles explore questions about the ways in which small multiplex exhibitors structure their businesses and the nature of their interactions with distributors and localised audiences. Having considered in the first article whether variations in the box-office performance of films in the different multiplexes can be related to the films' genre and censorship classification, this article consider the ways in which these variations might be linked to differences in the composition of the potential audience. We investigate the composition and cinemagoing practices of the audiences for Wallis' four multiplexes firstly through a demographic study of each venue's catchment area, and then through the analysis of a survey conducted in each venue over a two-week period. We conclude that cinemas have heterogeneous audiences, with overlapping and at times mutually exclusive tastes. Choosing where they see films predominantly on the basis of location and other spatial considerations, these audience groups cycle through a cinema on an approximately monthly basis, and successful programming, which remains a substantially intuitive process, has to accommodate these patterns of attendance.

Keywords: film exhibition, multiplex, programming, cinema audiences, audience preferences.

There is no shortage of evidence to make clear that even films intended for the mass market – and perhaps especially films intended for the mass market – do not produce uniform or predictable responses from their audiences.
Ian Christie[1]

In the first part of our study of the Wallis cinema chain in South Australia, we argued that economic models intended to intervene in decision-making in production or distribution make no accommodation for the micro-level variations of exhibition practice or audience taste that are the business life-blood of cinema operation. Using box office returns to study the cinemagoing preferences of audiences at the four Wallis multiplexes, we identified broad differences between the audience preferences at the two inner suburban multiplexes, the Piccadilly and Mitcham, and the two multiplexes, Mt. Barker and Noarlunga, situated in outer suburban areas over twenty kilometres from the Central Business District of Adelaide. This article extends those findings by asking additional questions about causal factors that might be employed to explain these differences, and also by pressing into service an empirical approach to studying audiences by asking them questions about their own behaviour.

Based on the significant variations in film preference, we initially hypothesised that the two types of multiplex draw audiences who may be demographically distinct from each other. In order to pursue this hypothesis, we have had to delineate, geographically, each cinema's potential audience – an exercise that in itself requires a second hypothesis about the size of the catchment area from which a cinema draws its audience.

Counting the Catchment

Predicting a cinema's catchment area is a matter of particular importance in deciding whether and where to build a new cinema complex, but information on the decision-making process underpinning the siting of multiplexes is relatively sparse. The notion of a catchment, in itself, suggests that cinemas will generally (but not exclusively) draw the bulk of their audiences based on proximity as a major factor. First run releasing in central business districts might have defied this logic, but suburban cinema has always relied on calculations of audience proximity. The increased dominance of suburban multiplexing has led analysts to entertain a variety of calculations concerning catchments. In 2000, developers in Britain were reported as looking for a catchment population of 250,000 living within a 20-minute drive time, while Peter Davis' 2006 US study concluded that 'geographic markets consist of at most 15-mile [24 km] circles around theaters', with a marked concentration within five miles [8 km].[2] Jehoshua Eliashberg, Anita Elberse and Mark Leenders cite a US industry rule of thumb that 'when the estimated movie-going frequency is 5.5 movies per year per person, one screen for every 10,000 people is needed'.[3] Eliashberg suggests that 'the local population is typically the most important factor' in the selection of new cinema sites, and that in this consideration, 'the age demographics and, to some extent, economics of local consumers play the substantial roles'.[4] The UK's Independent Cinema Office suggests 'a 10 or 15-minute' travel time for a cinema's 'inner catchment' where the majority of the regular cinemagoers live.[5] None of these sources, however, provide information about any demographic analysis informing these decisions, and any decision about potential catchment areas – whether for practical or analytical purposes – must accommodate the conditions determined by a cinema's surrounding

geography. In a metropolis the size of Adelaide, which has a population of approximately 1.3 million at an average density of just over 400 persons per square kilometre, applying the largest of these distances would be impracticable, because it would create significant overlap between each cinema's catchment. Mitcham is, for example, 20 km from Wallis' Noarlunga cinema centre as the crow flies, with Event Cinema's Marion 26-screen complex halfway between the two.[6]

Noting Davis' conclusion and approximating the industry rule of thumb, we limited our analysis of the demographic characteristics of each venue's catchment area to its most immediate surroundings by drawing a three-kilometre radius around each cinema. This relatively small radius was a rough starting point. It presumed that a high degree of localism is attached to cinemas, and it disregarded transport routes and other physical aspects of geography which might affect audience catchments. The benefit of this approach was that it allowed us to make productive use of the detailed demographic data provided by the Australian Bureau of Statistics (ABS) from the 2011 census, as well as avoiding overlaps with other cinemas and providing a catchment area for each cinema that was comparable in size. We then investigated these catchment zones to see whether they might contain significant demographic, or more broadly social, variations that might be suggestive of the different movie-going preferences observed in the box office figures of each venue. We recognised that this relatively arbitrary geographic restriction would clearly impose some limitations on any conclusions we might draw, and we address the consequent issues below. We modified the three-kilometre radii only once, in the case of the Piccadilly, where we truncated its zone at the Torrens River, so that it did not extend inside Adelaide's very clearly demarcated central business district, surrounded as it is by parklands. **Figure 1** illustrates the zones surrounding each cinema.

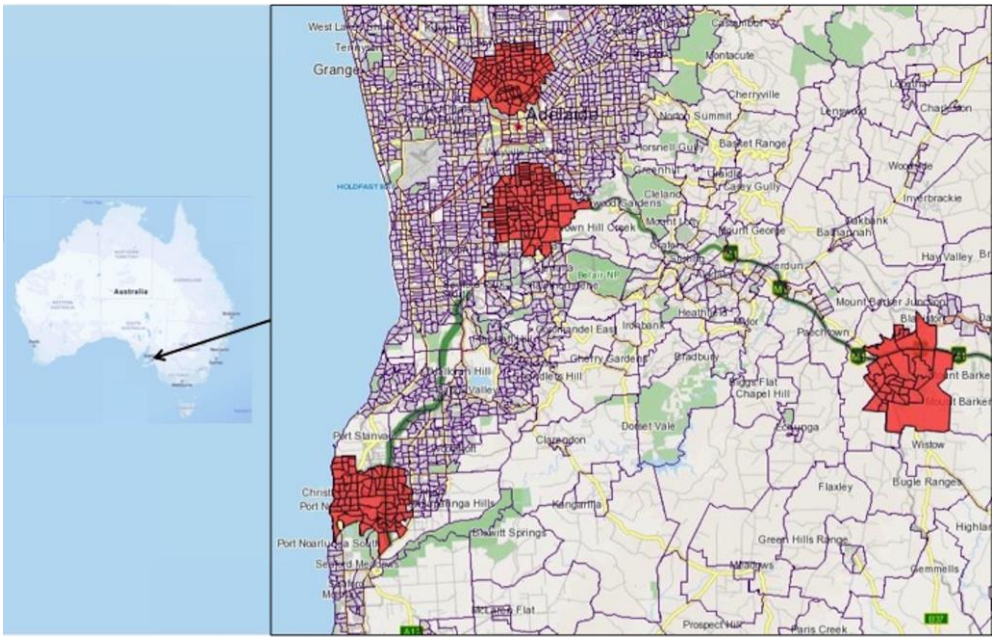


Figure 1: Catchment areas of Wallis cinema centres in the Adelaide environs.

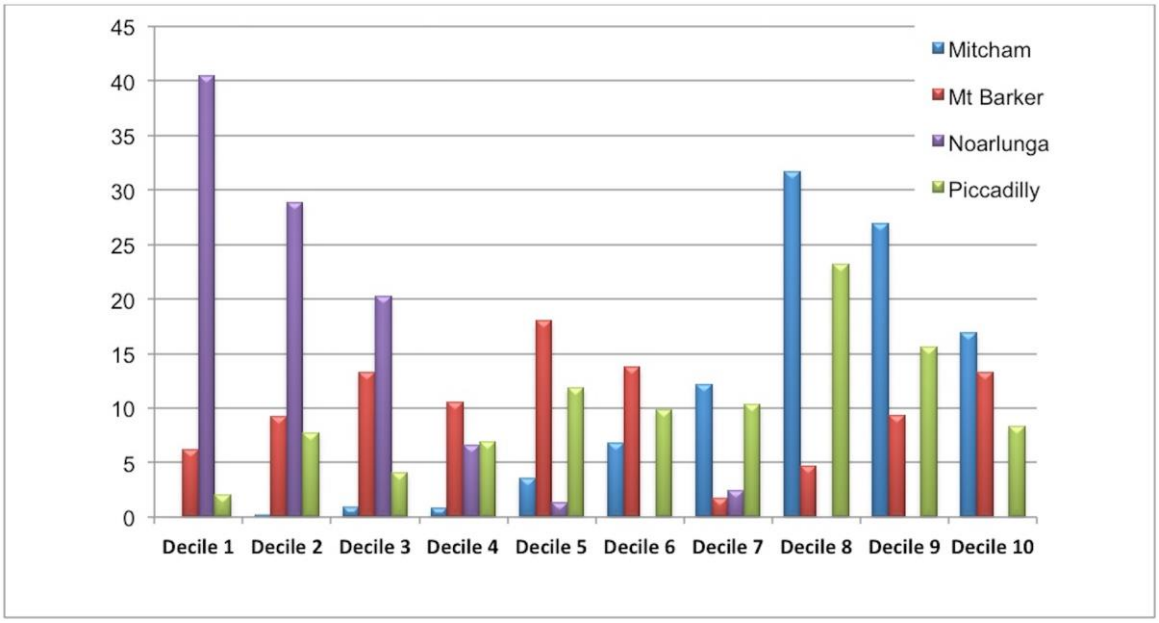
One limitation of our decision to restrict the catchment areas we investigated to a uniform three-kilometre radius is indicated by the variation in population density of the four delineated zones: while the Noarlunga and Piccadilly catchments are closely comparable, substantially more people live within three kilometres of the Mitcham complex and substantially fewer live within the same zone for Mt Barker. This suggests that the Mt. Barker development can expect to draw its audience from a larger catchment area. Regardless of the disparities in size, however, there are only small differences in composition by age and gender among all of the catchment zones.

	0-13 years	14-17 years	18-24 years	25-34 years	35-49 years	50+ years	Total
Mitcham	7,529 (16.7%)	2,464 (5.5%)	4,219 (9.4%)	4,740 (10.5%)	9,505 (21.1%)	16,558 (36.8%)	45,015
Mt Barker	2,950 (20.8%)	821 (5.8%)	1,247 (8.8%)	1,718 (12.2%)	3,128 (22.1%)	4,260 (30.2%)	14,124
Noarlunga	5,084 (17.3%)	1,490 (5.1%)	2,694 (9.2%)	4,039 (13.3%)	5,682 (19.4%)	10,344 (35.3%)	29,333
Piccadilly	4,393 (13.1%)	1,354 (4.0%)	4,347 (12.9%)	5,285 (15.7%)	6,773 (20.2%)	11,429 (34.0%)	33,581

Table 1: Population by age within a 3km radius of Wallis Cinema Centres. Data Source: Australian Bureau of Statistics, 2011 Census of Population and Housing

The most significant difference that we discovered was in the zones' alignment with the ABS' Index of Relative Socio-Economic Advantage and Disadvantage (IRSAD). This index is based on 25 measures from census data, including low and high income, occupation and unemployment status, language spoken at home, car ownership, size of home and of mortgage or rent payments, the number of divorced people and single parents, level of education, disability status, and internet access. A lower decile indicates greater relative disadvantage and a lack of advantage in general.[7] Using this Index, we found very striking differences between some of our regions. It is particularly notable that in Noarlunga's catchment, just under 90% of the population are in the lowest three deciles, indicating substantial social disadvantage, while the equivalent figure for Mitcham is under 1%. These marked differences indicate the possibility of a correlation between social disadvantage and audience preference: that variations in the level of social advantage are a significant factor in producing the different audience preferences we observed. As a broad generalisation – something that Bob Parr might have got from the seat of his pants – the data suggest that lower-levels of social advantage skew towards the family and action-based films (which we identified in our first article at outer suburban Noarlunga and Mt. Barker), while on the other hand, a greater preference for drama-based films, including literary adaptations, are

linked to higher levels of education and consequently lower levels of social disadvantage as measured by the index.



Graph 1: Index of Relative Socio-Economic Advantage and Disadvantage (IRSAD) Deciles for Areas within 3km radius of Wallis Cinema Centres (as expressed as a percentage of population). Data Source: Australian Bureau of Statistics, 2011 Census of Population and Housing.

Asking the Audience

I used to love it at the Chelsea, I thought standing out the front when you're busy, talking to people, and standing at the end of the show talking to people and getting people to know you – that's what it's all about. Unfortunately, so many businesses today don't do that, it's mechanical and I don't think it needs to be mechanical

Bob Parr

Although the differences in social advantage between the four catchment areas are stark, the reliability of any conclusions that might be drawn from these data is obviously limited by the arbitrary assumption of the three-kilometre catchment around each cinema.The validity of any statistical analysis of the potential audience for each multiplex depends on our empirically establishing a correspondence between the catchment group and the actual audience. We endeavoured to examine this through audience surveys, including questions seeking demographic and location information, factors influencing their film choices, their travel to the cinema and other activities undertaken together with a trip to the movies. Academic analysis has been much slower to adopt this methodology than the cinema industry itself, which systematically employs market research firms to refine its assumptions

about the behavior of its audiences.[8] The Motion Picture Association of America, in its annual reports, includes moviegoer surveys, which in 2017 were incorporated into a report labelled THEME, or Theatrical and Home Entertainment Market Environment.[9] This report details moviegoing frequency in the United States as well as age, gender and racial demographic categories, producing results at a national level. Our own attempts to survey audiences were comparatively modest. Teams of students conducted over 500 surveys at all four Wallis cinemas over a two-week period, from April 30 to May 15, 2015. Our survey was necessarily situational, gathering information from the people who both attended and chose to respond, and therefore subject to the limitations on reliability and validity attendant on any audience survey of its scale. With that caveat, we can develop a number of hypotheses and conclusions from the survey data.

Mitcham (*182)

Suburb	% of Patrons from Suburb	*** Suburb Commute (km)	** Persons/ha
Fullarton	6.0	4.0	30.2
Blackwood	5.5	9.0	9.1
Goodwood	5.5	4.0	21.9
Clapham	4.9	3.0	21.1
Cumberland Pk	4.4	3.0	24.8
Melrose Pk	3.8	4.0	16.2
Adelaide	3.3	5.0	14.5
Kensington	3.3	9.0	16.3
Belair	2.2	7.0	3.0
Aberfoyle Pk	2.2	16.0	19.2
% Total of Top 10 Suburbs	41.2		
Average commute (Km)		6.4	
Council District Density People/Ha			8.3

Piccadilly (82)

Suburb	% of Patrons from Suburb	*** Suburb Commute (km)	** Persons/ha
Ovingham	11.0	3.0	16.5
North Adelaide	9.8	0.5	18.3
Adelaide	8.5	4.0	14.5
Enfield	4.9	8.0	13.0
Lockleys	3.7	14.0	17.2
Golden Grove	3.7	21.0	15.1
Croydon	2.4	4.0	12.9
Woodville	2.4	7.0	20.3
Ethelton	2.4	20.0	13.0
Firle	2.4	6.0	21.2
% Total of Top 10 Suburbs	51.2		
Average commute (Km)		8.8	
Council District Density People/Ha			28.6

Mt Barker (125)

Suburb	% of Patrons from Suburb	*** Suburb Commute (km)	** Persons/ha
Mt Barker	18.4	0.5	0.5
Murray Bridge	10.4	45.0	0.1
Strathalbyn	9.6	24.0	0.1
Bridgewater	8.0	14.0	5.4
Aldgate	6.4	16.0	2.8
Echunga	5.6	9.0	0.2
Woodside	3.2	17.0	0.5
Littlehampton	3.2	3.0	0.5
Nairne	3.2	8.0	0.8
Mannum	2.4	70.0	0.1
% Total of Top 10 Suburbs	68.0		
Average commute (Km)		20.7	
Council District Density People/Ha			0.5

Noarlunga (125)

Suburb	% of Patrons from Suburb	*** Suburb Commute (km)	** Persons/ha
Morphett Vale	14.4	7.0	17.7
Seaford	12.0	9.0	8.8
Hackham	10.4	9.0	8.2
Aldinga	8.8	20.0	1.4
Noarlunga	7.2	0.5	6.5
Willunga	5.6	14.0	6.5
Hallett Cove	3.2	11.0	12.8
Old Reynella	3.2	8.0	14.8
Port Noarlunga	2.4	3.0	11.1
Tatachilla	2.4	30.0	0.5
% Total of Top 10 Suburbs	64.8		
Average commute (Km)		11.2	
Council District Density People/Ha			3.2

* Total number of patrons surveyed
** Data collected from profile.id.com.au
*** Distance measured from google maps road directions

Table 2: Number of patrons and population densities (persons/hectare) of the 10 most represented Adelaide suburbs

Our first question sought to establish the suburbs or towns from which audiences came. The results tabulated above (**Table 2**) show the top ten suburbs/towns for each cinema. They establish, once again, a major distinction between inner suburban (Piccadilly and Mitcham) and outer suburban (Noarlunga and Mt. Barker) cinemas.

The inner suburban audiences were dispersed across a greater number of suburbs, although, as with many other features of Adelaide's social organisation, there was a noticeably strong north-south divide. Mitcham, an inner southern suburb, drew no patrons from the northern suburbs of the city, while the Piccadilly, in North Adelaide, drew its audience from throughout the northern suburbs. The inner suburban areas have greater population densities, with the Piccadilly 28.6 persons per hectare, and Mitcham 8.3 as opposed to equivalent figures of 3.2 and 0.5 for Noarlunga and Mt. Barker respectively. Consequently, we learned that catchment measurements based on simple distances or travel times are not relevant, especially as patrons are prepared to travel much further to outer suburban cinemas, with Mt. Barker audience members travelling an average of 20.7 kilometres and Noarlunga audiences 11.2 kilometres. Although Mitcham and Piccadilly audiences travelled 6.4 and 8.8 kilometres respectively, these were still significantly in advance of our assumed figure of 3 kilometres. This suggests that we need to expand our sense of what constitutes localism in Adelaide, particularly given the pronounced preference, discussed in more detail below, for using cars as a means of transport.

The two outer suburban cinemas were also located on the city edge of their catchments, which then spread out to outer suburban satellite towns, suggesting that these venues act as relays to these increasingly sparsely populated satellite towns. The catchments of outer suburban complexes spread further away from cities towards satellite communities outside Adelaide. Mt. Barker draws most of its cinemagoers from communities in the hills outside Adelaide and even from the rural city of Murray Bridge, approximately 45 kilometres away, and Mannum which is 70 kilometres distant. The Noarlunga cinema draws many of its patrons from the McLaren Vale winegrowing districts. In these towns and suburbs, which are further from the city than the cinema, competition with other cinemas lessens and other opportunities for leisure activities are more sparsely located, particularly at night. Outer suburban multiplexes might be distinguished by the differing functions they fulfil for people who live in more sparsely settled areas that are not as well serviced by institutions that provide social interaction. This is borne out by the way that patrons of the two outer suburban cinemas were more emphatic that the Wallis cinema was their usual cinema. 80.8% of Mt Barker patrons and 64.3% those at Noarlunga agreed that these were their usual cinemas as opposed to the inner suburban cinemas, where there is a greater choice. 47.6% at the Piccadilly and 58.5% at Mitcham claimed that this was their regular cinema.

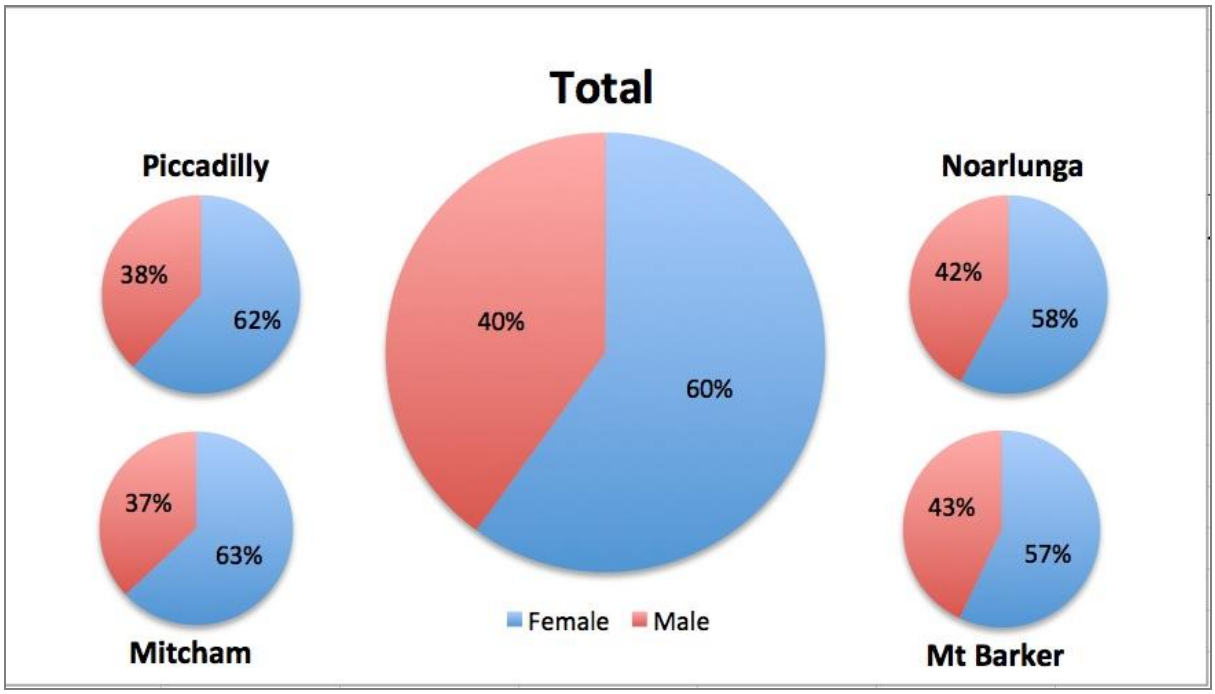


Table 3: Gender distribution

The demographic constituents of the audience were more uniform during the period of our survey. We consistently found that women constituted about 60% of audiences at all cinemas during these two weeks. The noticeably large percentage of women may well have resulted from the release of a female-skewing film, *Pitch Perfect 2*, in the first week of our survey period. *The Avengers: Age of Ultron*, which might have been expected to skew more towards a male audience, lost attendance very quickly after its first two weeks, which had immediately preceded our survey. On a nationwide basis, *Pitch Perfect 2* grossed over $A18 million during this two-week period, compared to just over $A8 million for *The Avengers: Age of Ultron*.[10] These kinds of fluctuation are a major element in multiplex programming. Patterns of wide release, in which a small number of films are showing on multiple screens and in multiple venues at the same time, will produce such skewing effects as a consequence of the dominant release in any week appealing disproportionately to one or other distinct audience grouping. The most visible likely consequence, captured in our data through *Pitch Perfect 2*'s release, is that some weeks' films will bring out male-skewing audiences, while other weeks will skew female. So, for example, in the last week of our survey period, another male-skewing action film, *Mad Max Fury Road*, was released, three weeks after the *Avengers* film, in order to bring action fans back into cinemas without competing too strongly with the preceding action film. Nevertheless, Bob Parr suggests that, in his experience, a long-held industry opinion about Classical Hollywood's audiences still holds true:

> Women are the instigators mainly of going to the movies. There's no doubt about that. So, if you've got a film that's a good crossover film where the guys

will go, that can be the winner, the ones that do very well. Real boy's pictures can fall over very quickly.

	Overall	Piccadilly	Mitcham	Mt Barker	Noarlunga
under 14	**1.4%**	0.0%	1.1%	0.0%	4.0%
14 to 17	**8.3%**	1.2%	6.6%	7.2%	16.7%
18 to 24	**23.9%**	24.7%	27.3%	22.4%	19.8%
25 to 34	**18.6%**	25.9%	19.1%	12.8%	19.0%
35 to 49	**22.9%**	23.5%	20.2%	24.8%	24.6%
50 to 64	**18.3%**	19.8%	19.7%	20.0%	13.5%
over 65	**6.6%**	4.9%	6.0%	12.8%	2.4%
median	**33.8**	33.5	32.0	38.8	29.2

Table 4: Age Distribution

Perhaps the most surprising result from our survey was that we found that the audience was consistently older than we expected, with an overall median age of almost 34.[11] This came as no surprise to the Wallis management. Marketing Manager Paul Besanko explained the distinctiveness of Wallis in the following terms:

> Predominantly we target older demographics. Our locations are at destination points … They are not necessarily in shopping centres but they are adjacent to shopping precincts. We do tend to target a 30 plus demographic … the majors [cinema chains] tend to play in the 16-30 age area.[12]

We found no clear age distinctions between inner and outer suburban theatres other than the greater fluctuations for the over-65 demographic in the outer suburbs, with Mt. Barker registering almost 13% of its patrons in this group, while Noarlunga's equivalent figure was only 2.4%. This variance did not correlate with the demographic data, but Bob Parr had assured us that Noarlunga was a 'family audience', and it had the lowest median age of all the cinemas, with the highest percentage of its audience under 17.

It is notable that all cinemas had very small percentages of child admissions (under 14) and it is necessary to make the same point here as in the preceding section on gender. Our survey was conducted during school weeks; had it been conducted during school vacation periods we would almost certainly have obtained significantly different results. This conclusion was reinforced by discussions with Wallis management, who confirmed our observation that youth audiences, like gender-skewing ones, come in predictable cycles.

They recognise, in practice, that there is no single homogeneous audience, but rather a series of audiences that cycle through cinemas on a regular basis.

	Overall	Piccadilly	Mitcham	Mt Barker	Noarlunga
More than once per week	**0.6%**	0.0%	1.1%	0.8%	0.0%
Once per week	**9.5%**	17.3%	7.1%	9.7%	7.9%
Once per month	**66.7%**	65.4%	71.0%	63.7%	64.3%
Between once/month and once/year	**21.4%**	17.3%	19.7%	23.4%	24.6%
Less than once per year	**1.8%**	0.0%	1.1%	2.4%	3.2%

Table 5: Frequency of attendance

How frequent are these cycles? By far the most common response to this question was that among people who go to cinemas, monthly attendance is the most common frequency. The inner-city Piccadilly enjoyed the most consistent frequency of attendance, with approximately double the proportion of its patrons claiming to attend on a weekly basis than occurred elsewhere. Noarlunga showed a slightly weaker frequency of attendance. Cinemas have multiple audiences, and their tastes only sometimes overlap. To cater to the full range of the potential audience, they have to program accordingly, and to do so on a frequency of approximately once a month.

We asked Wallis' patrons their preferred day and time of day for cinemagoing. The results showed that a majority of patrons (51.1%) preferred to attend in the second half of the week, with only 15% indicating a preference for Monday to Wednesday, and 34% claiming no preference. A very strong majority (68.7%) preferred to attend after 5 pm; only 13.7% expressed a preference for attending earlier in the day. These preferences should come as no surprise, reflecting the extent to which cinema exhibition has traditionally been geared around weekend and evening attendances. Perhaps the most significant finding here is, again, the consistent variation between inner and outer suburban cinemas. Patrons of the two outer suburban cinemas demonstrated a greater preference for seeing films earlier in the week (Mt Barker 21.6% and Noarlunga 16.7% as against 10.4% and 12.3% for Mitcham and the Piccadilly respectively). Outer suburban patrons also expressed a greater preference for seeing films earlier in the day than their counterparts in inner suburbs (27.2% at Mt Barker and 18.4% at Noarlunga preferred to go before 5 pm as opposed to only 6.1% at the Piccadilly and 4.3% at Mitcham.

As multiplexes offer largely similar programming, and as pricing models derived from streaming services such as Netflix put pressure on prices, attempts to differentiate cinemas and to drive consumption increasingly depend on these factors in audience behaviour. Questions concerning day and time preferences have become more prominent in industry surveys as cinemas attempt to introduce selective pricing, raising prices at busy times and

offering discounts for matinees and on quieter days. Apps such Choovie in Australia base ticket prices on these kinds of estimations, making finer gradations in audience preferences increasingly necessary for cinemas.[13]

One of the most decisive aspects of audience behaviour for us remains the issue of how audience members get to cinemas. In our first article, we drew attention to the role of transport as a major explanatory factor in cinema exhibition. An even stronger claim can be made: that the major influence on changing patterns of exhibition has been the sequence of changes in patterns of urban transport, from the entertainment district clustering that linked first-run movie palaces and radial public transport systems prior to the 1950s to the increase in private car ownership that produced drive-in cinemas and then shopping mall multiplexes located on urban fringes.[14] One of the most categorical findings of our survey was the overwhelming pattern that emerged when we asked audience members how they had travelled to the cinema. All cinemas showed massive preference for cars as the means by which people travelled. Clearly, the cinema in Adelaide is something to which people drive. This explains the lack of cinemas in Adelaide's Central Business District, where parking is more difficult and more expensive. There is also a common understanding shared by cinema operators and municipal councils that the seating capacity of cinemas should be constrained by the availability of parking spaces. There were only relatively small variations in the massive majorities enjoyed by car drivers, and these were at the Piccadilly, the Wallis cinema located most adjacent to the CBD and without a dedicated parking lot. Yet even here over 80% of patrons drove to the cinema.

	Overall	Piccadilly	Mitcham	Mt Barker	Noarlunga
Car	**91.5%**	81.7%	94.5%	90.4%	94.4%
Car and public transport	**0.6%**	1.2%	0.5%	0.0%	0.8%
Car and walk	**0.6%**	3.7%	0.0%	0.0%	0.0%
Car and other	**0.4%**	2.4%	0.0%	0.0%	0.0%
Public transport	**3.3%**	4.9%	1.6%	5.6%	2.4%
Walk and public transport	**0.2%**	0.0%	0.5%	0.0%	0.0%
Walk	**3.1%**	6.1%	1.6%	4.0%	2.4%
Other	**0.4%**	0.0%	1.1%	0.0%	0.0%

Table 6: Modes of transport to cinema

The importance of transport factors was borne out by a subsequent question that asked cinemagoers to indicate the factors that had led to their choice of cinema. **Table 7** shows that travel-based factors (location, ease of access, and parking) filled three of the top four spots. Choice of films available remained fairly constant at around 20%. Individual theatre-specific qualities such as atmosphere and cinema facilities ranked comparative low, with only the older art-deco designed Piccadilly being an exception. It seems that what happens

at the cinema is not so decisive as what happens coming and going from the cinema. With wide release patterns ensuring that most cinemas screen the same films in the same week, it is not particularly surprising that the choice of which cinema to attend was influenced by spatial and locational factors rather than by screening options. This is not to say that audiences do not care about what happens at cinemas, but rather that under the prevailing patterns of distribution and release, cinemas can be more easily differentiated by transport factors rather than screening and content-based factors.

	Overall	Piccadilly	Mitcham	Mt Barker	Noarlunga
Location	**81.4%**	79.5%	75.7%	90.1%	79.5%
Easy to get to	**36.9%**	30.8%	44.9%	25.7%	30.8%
Choice of movies	**20.4%**	20.5%	16.8%	20.8%	20.5%
Parking	**18.0%**	12.8%	33.6%	9.9%	12.8%
Atmosphere	**17.4%**	38.5%	21.5%	8.9%	38.5%
Cinema facilities	**13.7%**	15.4%	18.7%	10.9%	15.4%
Service	**10.1%**	15.4%	10.3%	6.9%	15.4%
Other	**6.1%**	5.1%	8.4%	1.0%	5.1%

Table 7: Reasons for choice of cinema

A strong tenet of the New Cinema History is that the cinema should also be understood as a social practice rather than being examined solely within the framework of a textual analysis of what is on the screen. With this in mind we framed questions of cinema-goers not only about the means by which they reached the cinema, but also whether they attended as a means of interacting with other people, and whether they combined their film viewing with other activities.

	Overall	Piccadilly	Mitcham	Mt Barker	Noarlunga
Alone	**5.3%**	11.1%	3.8%	6.4%	2.4%
Pair	**52.0%**	51.9%	51.6%	50.4%	54.4%
Trio	**17.9%**	29.6%	17.6%	13.6%	15.2%
More than three	**24.8%**	7.4%	26.9%	29.6%	28.0%

Table 8: Number in group attending

There was remarkable uniformity, showing that the lone cineaste is a rare creature, and not one offering cinemas an economically viable existence. Just over 50% of patrons at all of the cinemas attended in pairs. These were not necessarily romantic couples on dates, but included family members and other groups. These results made it clear that for the vast

majority of the audience, movie-going is something that is done with someone else. At cinemas other than the Piccadilly, over a quarter of the audience attended in groups of three or more, while only a very small minority attended alone. It is worth recalling that in Table 5, the Piccadilly also had by far the largest percentage (17.3%) of patrons who claimed to attend on a weekly basis. While the Piccadilly conforms in many ways to the generalisations about all Wallis cinemas, and to the comments about inner suburban cinemas that we are making here, there are also aspects that demonstrate a degree of distinctiveness to its patrons.

When we asked about the purpose of their trip, a majority of all respondents (56.4%) indicated that they had come out simply to see a film, with only 43.6% planning to combine cinemagoing with other activities. Once again, however, the Piccadilly was an exception, with a majority (56.1%) indicating that their film-going was associated with other activities. The distinction here was not between inner and outer suburbs, as Mitcham and Mt. Barker registered almost identical scores. When we inquired into the nature of these other activities, eating was by far the most popular choice, registering in 35% of responses. It was here that the distinction between the inner-suburban Piccadilly and Mitcham cinemas and the outer suburban Mt. Barker and Noarlunga cinemas re-asserted itself. 45% of the Piccadilly's respondents and almost 39% of those at Mitcham indicated an intention to combine eating with cinemagoing, while the corresponding figures at outer suburban Mt Barker and Noarlunga were 34% and 24% respectively. This stronger preference for eating in the inner suburbs may harken back to our earlier observation about the correlation between outer-suburban cinemas and higher rates of social disadvantage. Another hypothesis would relate it to the availability of nearby restaurants, since the Piccadilly is located adjacent to a restaurant strip in North Adelaide.

Shopping was the next most popular activity, especially in the outer suburbs, with responses of 9.6% at Mt Barker and 7.2% at Noarlunga, compared to 2.4% at the Piccadilly and 3.2% at Mitcham. The comparatively low score for shopping is probably something that is distinctive of Wallis cinemas in general, as the circuit is not strongly associated with large shopping mall managers in the manner of larger Australian circuits such as Hoyts and Event Cinemas. Only one of the four complexes, Mitcham, is located inside a shopping mall, although the other three are close to commercial districts.

Finally, there has been a longstanding debate about whether people go to the cinema to see a specific film or whether they simply go for the sake of going to the cinema: in other words, whether what is on the screen is particularly important.[15] **Table 9** shows that three-quarters of the audience consistently agree that they want to see a specific film, while only one in six admit that they go for the sake of going rather than for the film. On this question there is no significant difference between the different cinemas. While at first glance the answers to this question seem to be at odds with the answers in **Table 7** that only 20% of respondents chose the cinema on the basis of the films on offer, we would suggest that, considered together, these answers indicate that audiences tend to choose the

films they see on the basis of their temporal availability, but choose where they see them because of other, predominantly spatial factors.

	Overall	Piccadilly	Mitcham	Mt Barker	Noarlunga
Specific film	**74.6%**	75.6%	74.9%	73.6%	74.4%
Just to go to the movies	**16.5%**	19.5%	15.8%	14.4%	17.6%
Both	**8.2%**	3.7%	8.7%	11.2%	7.2%
Cannot say	**0.8%**	1.2%	0.5%	0.8%	0.8%

Table 9: Reason for attending

However, there remains the question of how deeply seated is the decision to see a specific film. **Table 10** shows that only a very small percentage of cinemagoers decide what to see after arriving at the cinema, although the decision might not be the product of lengthy consideration, as over 40% of the patrons at all cinemas (with a slightly larger score in the outer suburbs) make their decision in the day before they go. Further questions would be needed to distinguish between those who act quickly to see a preferred film and those who act impulsively to visit a cinema. If we contrast this with the data in **Table 7**, which strongly privileged location factors as decisive in the choice of a particular cinema, we might observe that in the age of saturation releases, the choice of a particular film is time-based (seeing a new film immediately while it retains its novelty) while the choice of a cinema is spatially-based (seeing it at the cinema that is most easily accessible by car).

	Overall	Piccadilly	Mitcham	Mt Barker	Noarlunga
In the last 24 hours	**44.4%**	42.7%	40.4%	51.2%	44.4%
From 1 to 7 days ago	**32.9%**	41.5%	36.1%	26.4%	29.0%
Over a week ago	**21.0%**	13.4%	21.3%	21.6%	25.0%
When I got to the cinema	**1.8%**	2.4%	2.2%	0.8%	1.6%

Table 10: Timing of decision to attend

Conclusion

Our research has demonstrated that despite the contemporary industry's practices of saturation release across supposedly homogeneously-designed and run multiplexes, audience preferences are far from uniform. The nuances of local audiences' tastes are poorly captured either by the relatively crude demographic divisions of distributors' "quadrants" or by equally simple classifications by genre. As we argued in the first article on

Wallis Cinemas, the capacity to identify the taste publics in the audience, and to select and program films that will appeal to these publics, continues to be a crucial skill possessed by veteran programmer Bob Parr and his fellow managers. Parr's seat-of-the-pants activities describe on the one hand the processes of building local audiences through venue-specific and sometimes film-specific forms of programming, and on the other the application of a complex, intuitive set of heuristics that are also closely attuned to the local circumstances of his cinemas and his audiences. Film exhibition still retains important local components in the knowledge of how audience preferences and behaviours interact with programming options. A cinema's catchment area is a significant factor in defining its audience's preferences and therefore programming decisions, but the catchment is also difficult to ascertain, particularly given the audience's dependence on transport. Identifying a multiplex's potential audiences is, we suggest, as much a matter of intuitive heuristics as programming is.

We have demonstrated that cinemas have heterogeneous audiences, with overlapping and at times mutually exclusive tastes. These different audiences cycle through a cinema on an approximately monthly basis, and successful programming has to accommodate these patterns of attendance. While our data indicates that choosing which film to go to is a decision based around temporal factors, choosing which cinema to go to is, in the age of saturation release, a decision based predominantly on spatial considerations.

Our research also suggests that in Australian capital cities, at least, there are two broadly different types of multiplexes: those in the more socially advantaged areas of inner suburban neighborhoods that fit in with a range of other leisure activities and compete with a range of other cinemas; and those in the further-flung outer suburbs associated with urban sprawl. Here, cinemas stand alone as more isolated relay points connecting widely spread groups to urban leisure facilities which are often more attuned to satellite communties than to central business districts. The differences between these cinemas are shown in the types of programming distinctions made by people like Bob Parr, but beyond this, their differences stem from their integration into their social and geographical place and function. Cities are not homogeneous spaces.This recognition indicates the increasing relevance of connections to cultural geography with its analysis of population densities, socio-economic and demographic analysis, and urban transportation patterns. As the figures on group attendance make clear, the cinema is not simply, and perhaps not even primarily, a site of textual consumption, but more importantly, a place of social interaction, as it always has been.

In order to capture this wider sense of the importance of cinema, we have attempted to incorporate a range of approaches that are only beginning to be included in the study of the cinema. These have involved talking to significant agents in cinema administration as well as the use of empirical methods such as statistical analysis and audience surveys. As a consequence, we know more about film-going – about who goes, and when and how they go – and we know this with greater precision, even if there are no real surprises in the data.

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