

# SPATIAL JUSTICE STUDIO



## ACCESS TO MOVIE THEATERS

A PRELIMINARY EXAMINATION OF THE IMPACT OF ACCESS TO MOVIE THEATERS ON AUDIENCES AND COMMUNITIES IN WINSTON SALEM, NORTH CAROLINA.

May 1, 2019

Professor Joanne Moore, UNCSA



- I. INTRODUCTION/OVERVIEW
- II. WINSTON-SALEM FILM EXHIBITORS
- III. DEMOGRAPHICS OF COMMUNITIES
- IV. SOCIAL VALUE OF ACCESS TO THEATERS
- V. CONCLUSIONS/NEXT STEPS

## I. INTRODUCTION

Cinema has become a powerful vehicle for leisure, culture, education and propaganda around the world. But how many people have easy access to movie theaters and what, if any, are the benefits to such access for individuals and the community at large?

In 2018 there were nearly 40,600 screens in the United States, a slight increase from 2017. The majority of screens (89%) were located at venues with five or more screens. Three-quarters (75%) of the U.S./Canada population aged two or older, or 263 million people, went to a movie at the cinema at least once in 2018 (“moviegoer”), and roughly 1 in 8 (12%) could be deemed frequent moviegoers in claiming to attend at least once a month. These frequent moviegoers accounted for an estimated 49% share of tickets sold, roughly 4 times their population share.

Source: HIS Markit 2018.

### **Who Goes to the Movies?**

The gender composition of moviegoers was evenly split between men and women last year, but the age representation diverged more. Adults ages 25-39 in particular seem to be keen moviegoers. This bracket, which represents 21% of the 2+ population, comprised a larger 24% of moviegoers and 26% of tickets sold.

The 12-17 and 18-24 age groups are also more densely concentrated in the moviegoing than general population, while the 60+ segment under-indexes in cinema attendance.

On a racial and ethnic basis, the MPAA study reveals that Hispanics are avid moviegoers. At 18% share of the population, they represented 20% of moviegoers and 23% of ticket sales.

### Who Are the Frequent Moviegoers?

The study indicates that similar patterns apply to the frequent moviegoing population, which tends to be over-represented by teens, younger adults, and Hispanics.

For example, teens comprised 13% of frequent moviegoers last year, as compared to 8% of the population. And 18-39-year-olds collectively represented 38% of frequent moviegoers, as opposed to 30% of the population at-large.

Hispanics, for their part, represented almost one-quarter (24%) of the frequent moviegoing audience, a proportion one-third higher than their share of the population (18%).

Caucasians/Whites, by contrast, comprised a smaller share of frequent moviegoers (54%) than of the general population (61%).

### How Often Did They Go?

The typical moviegoer bought 4.7 tickets last year, meaning that average per capita attendance (counting those who did not go) was closer to 3.8 tickets.

Per capita movie attendance was higher among men (3.7 tickets per year on average) than among women (3.4). On an age basis, the highest per-capita attendance figures were reserved for teens (12-17), who averaged twice as many movies (4.9) as those ages 60 and older (2.5).

Not far behind, 18-24-year-olds averaged 4.7 tickets bought per capita, while 25-39-year-olds averaged 4.4 per person. Children (2-11) – as estimated in this case by their parents – averaged 2.9 tickets bought per child. As such, children represented a smaller share of tickets sold (10%) than of the general population (13%).

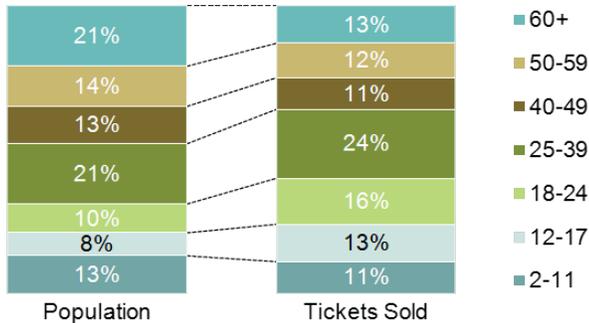
Non-Caucasian Americans are more frequent moviegoers than Caucasians. Asian and other ethnicities saw 6.1 movies per person, while Caucasians only attended 3.2. African-Americans and Hispanics were also above average movie attendees with 4.6 and 4.2 visits, respectively. The Asian and others ethnic category accounted for only 8% of the US population, but accounted for 14% of tickets sold. 62% of Americans are Caucasian, but they only bought 51% of movie tickets in 2016.

*About the Data:* The results are based on a survey commissioned by MPAA and conducted by Opinion Research Corporation (ORC) International among a representative sample of 8,087 adults, comprised of 4,045 men and 4,042 women ages 18 and older. The online survey was fielded from January 4-31, 2018. Where the respondent indicated the presence of a child or children in the household ages 2-17, the respondents was asked to provide estimates of the frequency of each child's motion picture attendance, as well as the child's age and gender.

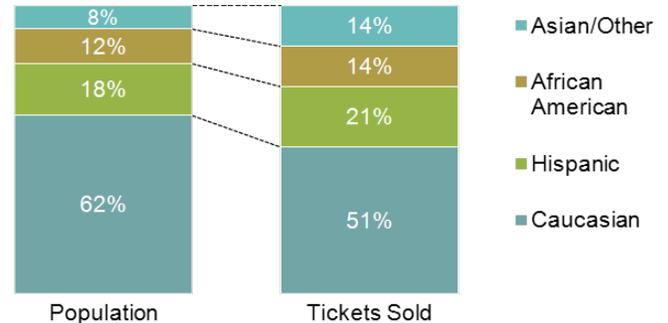


The charts below, based on data from the MPAA Theatrical Market Statistics 2016, summarize these trends:

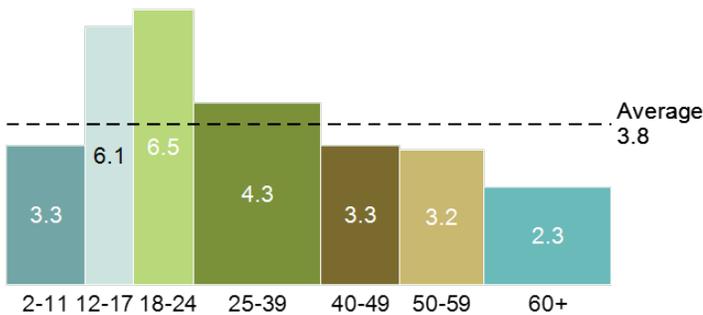
Age Group Share of Population and Tickets Sold



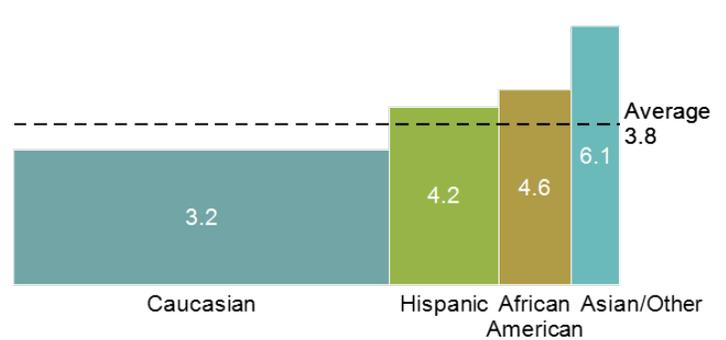
Ethnicity Share of Population and Tickets Sold



Number of Movies per Person by Age Group



Number of Movies per Person by Ethnicity



## II. WINSTON-SALEM FILM EXHIBITORS

There are five theaters within Winston-Salem. The largest being an 18-theater complex, the smallest with 4 theaters.

### 1. THE GRAND WINSTON-SALEM 5601 UNIVERSITY PARKWAY WINSTON SALEM, NC 27105

18 theater multiplex, Imax, Stadium seating, birthday party packages, wall to wall screens, recliner chairs, game room, digital sound, specialty café, 3D capabilities, free refill large corn and drinks, closed captioning, rewards program. VSS-Southern Theatres, LLC (“Southern”) is a portfolio company of Veronis Suhler Stevenson (“VSS”), a leading private equity firm. Southern was formed in May of 2003 by Mr. George Solomon who has been in the theatre business with his family for over 50 years. He launched Southern to develop and operate state-of-the art multiplex stadium-seating movie theatres. To date, VSS has invested over \$56 million in Southern. VSS is a private equity and mezzanine capital fund management company dedicated to investing in media, communications and information industries in North America and Europe. Southern Theatres is the sixth largest theatre circuit in The United States and is currently responsible for the daily operations of The Grand Theatres, AmStar Cinemas, and Movie Tavern. The company operates 40 locations with

458 screens in Alabama, Colorado, Florida, Georgia, Kentucky, Louisiana, Mississippi, New York, North Carolina, Pennsylvania, South Carolina, Texas and Virginia. Southern is well positioned for continued expansion in key markets throughout the United States. Southern is proud to be headquartered in New Orleans, LA.

## 2. AMC Classic Winston-Salem 10 3640 Reynolda Rd Winston Salem, NC 27106

10 theater Cineplex with 3D & jumbo digital screens showing first-run mainstream films. Experience the difference of AMC amenities. From spacious rocking seats to luxury recliners, innovative menus and premium offerings like IMAX, Dolby Cinema, and Prime at AMC, AMC Theatres offers a range of ways to get more out of movies. It's showtime! AMC CLASSIC is here to serve up movie memories with friends & family. Come enjoy Coca-Cola Freestyle and delicious menu items like pretzel bites, movie nachos, and annual refillable popcorn buckets, all at a great value. These theatres, equipped with full kitchens, offer experiences ranging from full-service dining to express-pick up. You can enjoy a wide range of innovative menu items, drinks, and desserts—all from the comfort of your seat while taking in the latest film. When you join AMC Stubs you'll get great deals, rewards points, and exclusive offers, all for doing what you do best which is love movies! Get more when you use your AMC Stubs Membership rewards at any theatre from Classic to Dine-In!

## 3. AMC Classic Hanes 12 1501 SW Hanes Mall Blvd Winston Salem, NC 27103

12 theater Cineplex with 3D & jumbo digital screens showing first-run films, opera productions & sports events. Experience the difference of AMC amenities. From spacious rocking seats to luxury recliners, innovative menus and premium offerings like IMAX, Dolby Cinema, and Prime at AMC, AMC Theatres offers a range of ways to get more out of movies. It's showtime! AMC CLASSIC is here to serve up movie memories with friends & family. Come enjoy Coca-Cola Freestyle and delicious menu items like pretzel bites, movie nachos, and annual refillable popcorn buckets, all at a great value. These theatres, equipped with full kitchens, offer experiences ranging from full-service dining to express-pick up. You can enjoy a wide range of innovative menu items, drinks, and desserts—all from the comfort of your seat while taking in the latest film. When you join AMC Stubs you'll get great deals, rewards points, and exclusive offers, all for doing what you do best which is love movies! Get more when you use your AMC Stubs Membership rewards at any theatre from Classic to Dine-In!

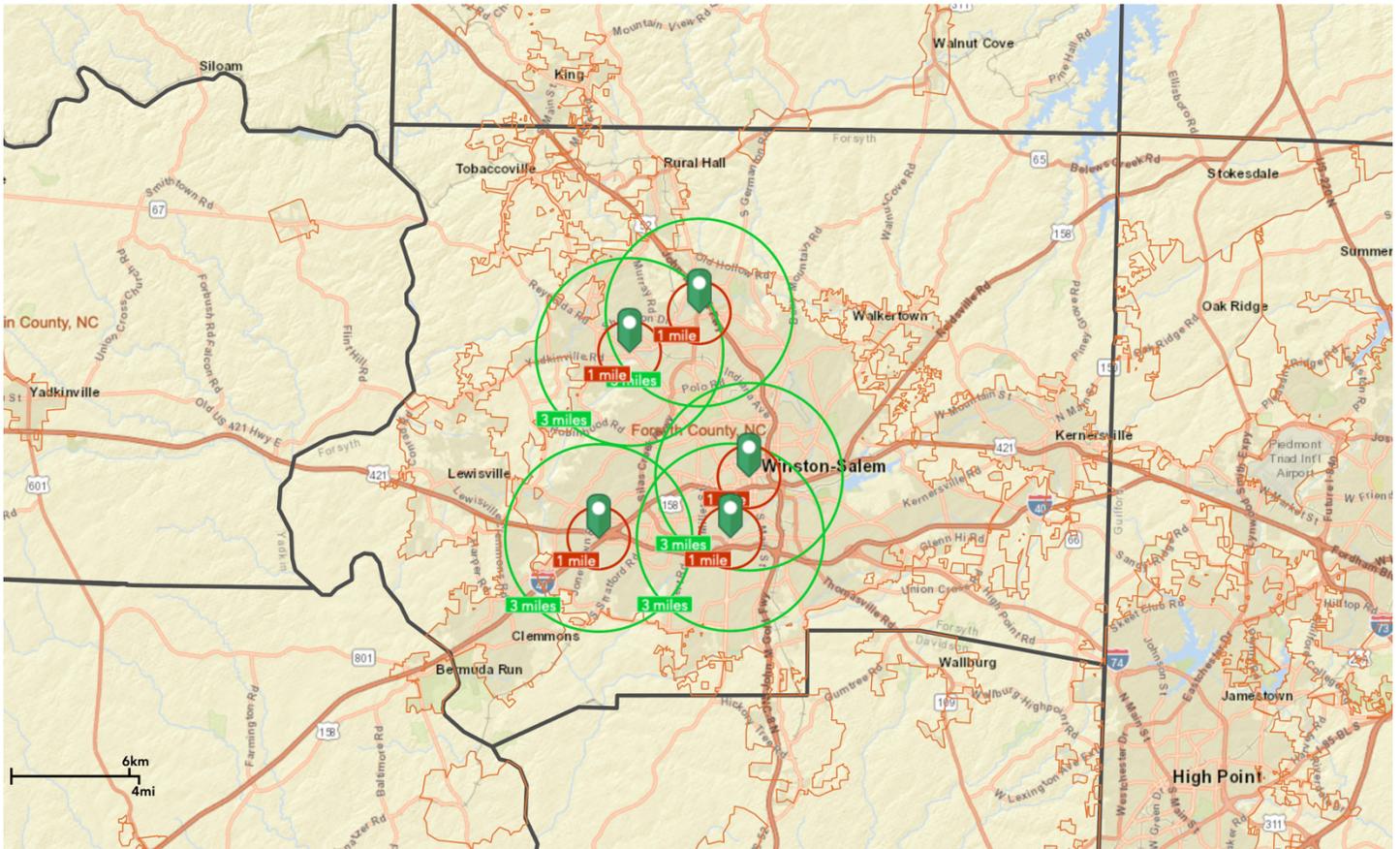
#### 4. A/PERTURE CINEMA 311 WEST FOURTH STREET WINSTON SALEM, NC

A four-theater complex. In January 2010, a/perture cinema opened as a small two-screen art house cinema with the purpose of showcasing independent, foreign, documentary, local and festival films. At the time of opening, a/perture became a destination for non-commercial and artistic films that were not offered elsewhere in Winston-Salem and the surrounding communities. Located in the heart of downtown Winston-Salem, a/perture revived the theatrical experience in the central business district. Over the past seven years, a/perture has become a space to enjoy and celebrate art on film while fostering social capital and shared experiences. In 2013, a/perture expanded to add two additional screening rooms and now on an annual basis provides the community a home for more than 4,000 film screenings and events per year, with over 700 titles screened to date. a/perture is open 365 days a year.

#### 5. MARKETPLACE CINEMAS 2095 PETERS CREEK PARKWAY WINSTON SALEM, NC 27127

The Marketplace 6 Cinemas was Winston-Salem's second multiplex theatre that opened on May 31, 1985 under Plitt Southern Theatres with a seating capacity of 1,700. At the time of its opening, the complex housed two 350-seat auditoriums, two 275-seat auditoriums, and two 200-seat auditoriums. Features included expanded concession stand, restroom facilities for those with wheelchairs and extending parking in front and on the sides of the cinema. The opening attraction for its grand opening was Chevy Chase in "Fletch" that played on two screens! The coming attractions were "Back To The Future", and "The Goonies". Lots of great memories!!! A lot of movie blockbusters got first-run billing here ranging from "Top Gun", "Batman", "Jurassic Park" and others. By 1988, Cineplex Odeon purchased this theater from Plitt until 1990, when Carmike Cinemas got a hold of this cinema from both Cineplex Odeon and Plitt Southern Theatres, but it was still a cash money making cow showing first-run films. Carmike closed this theatre in 1999, but it has reopened as a second-run discount movie house under an independent chain.

# Forsyth County Movie Theaters

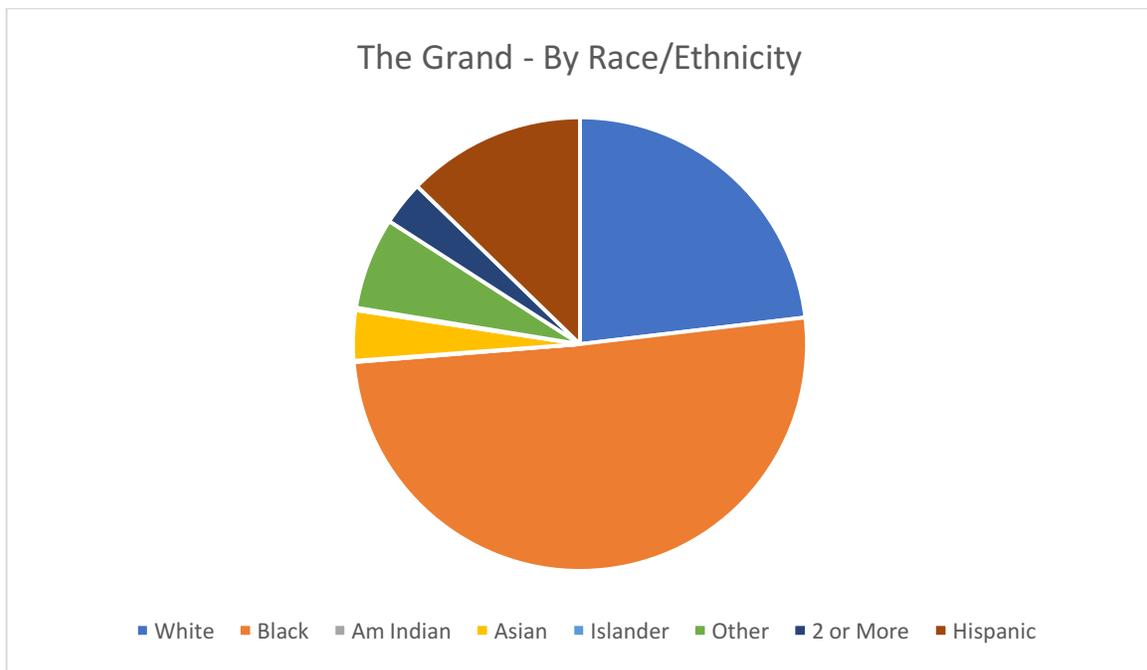
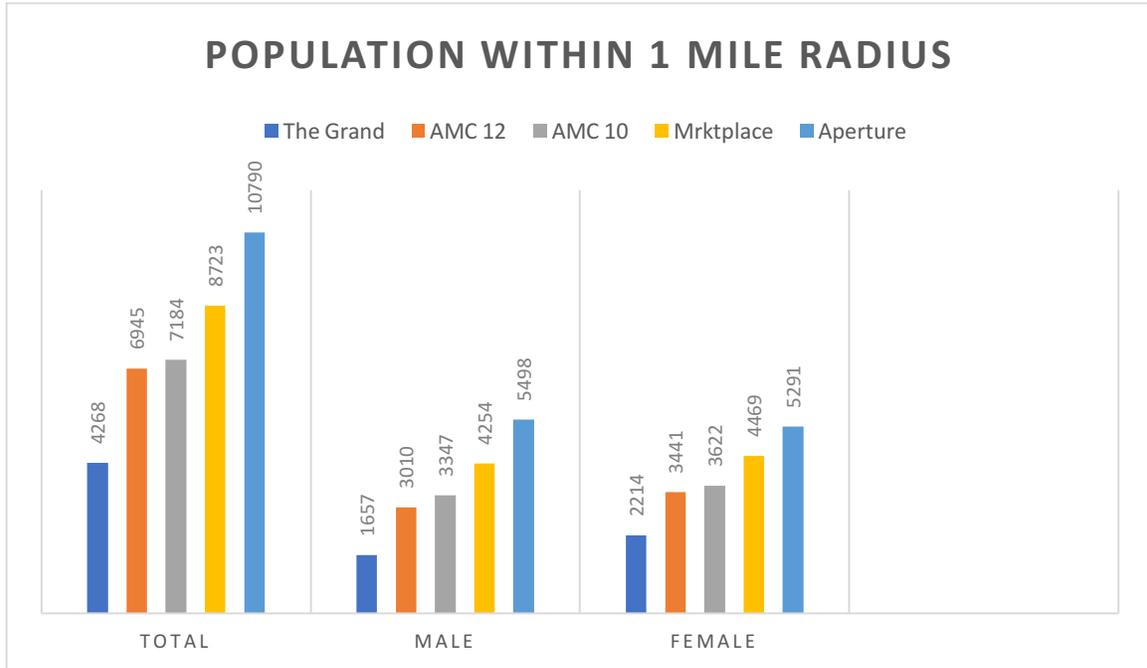


Source: ©2018 Esri. November 20, 2018

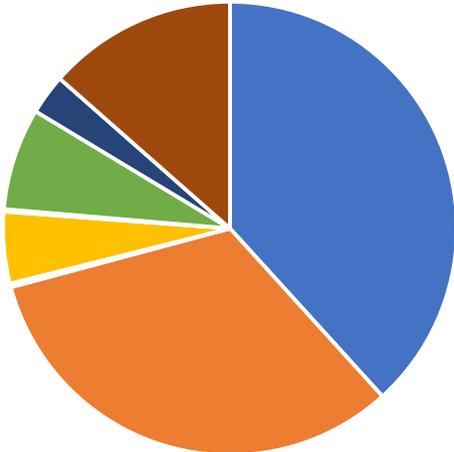


### III. DEMOGRAPHICS

Source: MapForsyth 2018 (U.S. Census Bureau, Esri forecasts for 2018)

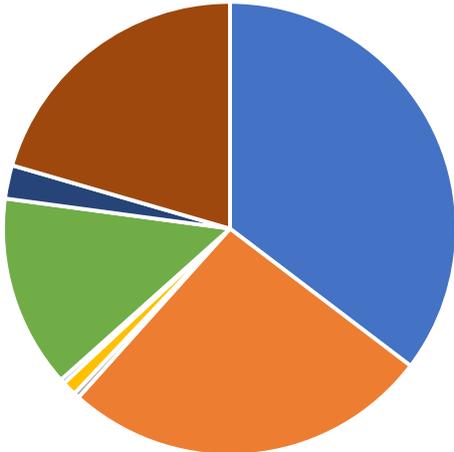


AMC 12 - By Race/Ethnicity



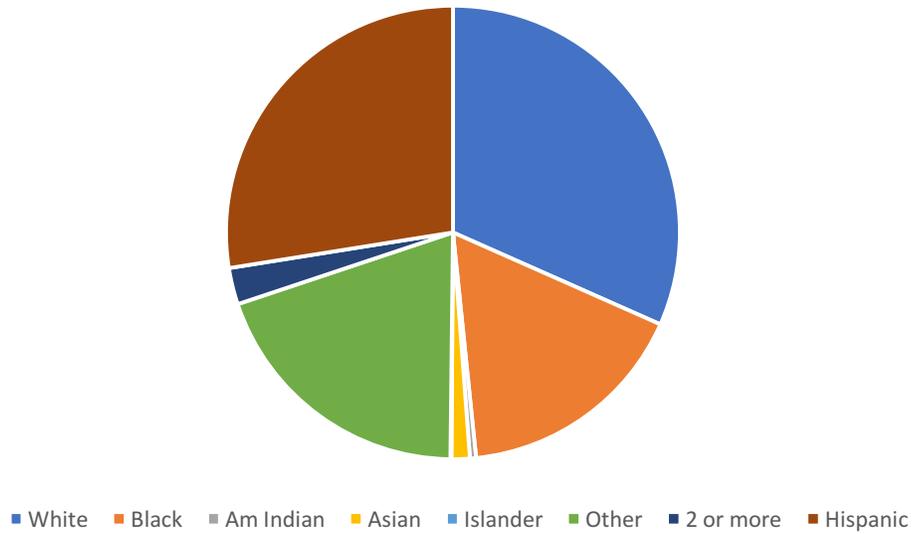
■ White ■ Black ■ Am Indian ■ Asian ■ Islander ■ Other ■ 2 or more ■ Hispanic

AMC 10 - by Race/Ethnicity

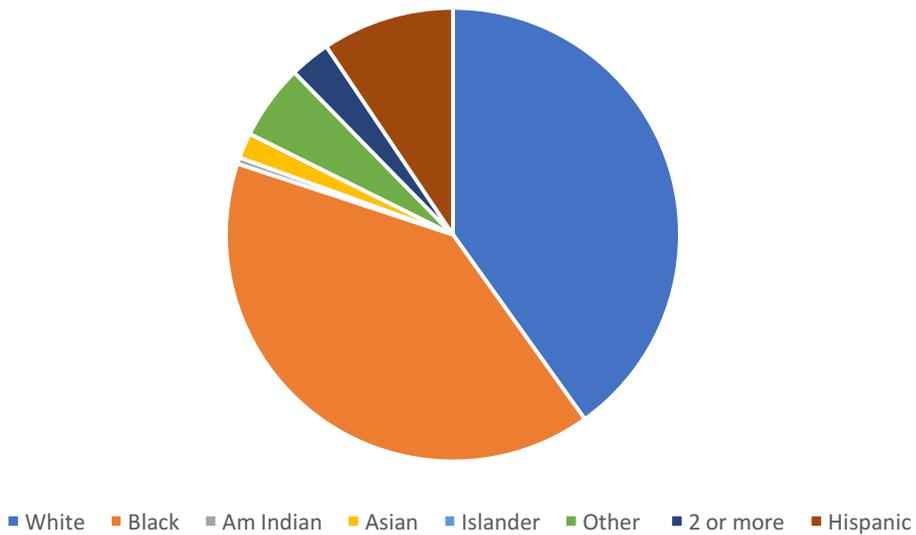


■ White ■ Black ■ Am Indian ■ Asian ■ Islander ■ Other ■ 2 or more ■ Hispanic

Mrktplace - by Race/Ethnicity



A/perture - by Race/Ethnicity



As the charts show, a significant number of potential moviegoers surrounding each theater are white, black or Hispanic, with the combined number of blacks and Hispanics outnumbering whites at every movie theater. This, coupled with the findings of the MPAA (Motion Picture Association of America) that Non-Caucasian Americans are more frequent moviegoers than Caucasians, suggests that further research should be conducted regarding the programming of each theater and whether it caters to the diverse local population.

## IV. SOCIAL VALUE OF ATTENDING THE CINEMA



While cinema attendance is not the only source of public engagement with film it remains the most widespread and influential. However, beneath the positive veneer, a recent study in Scotland suggests that audience access to film exhibition is defined by where you live with clear geo- demographic gaps in provision. Source: The Experiences and Impact of Local Cinema in Scotland, July 2016

Access to movie theaters can have a positive impact on the emotional well-being of movie-goers. In a 2005 paper by S C Noah Uhrig (University of Essex, UK) entitled, "Cinema is Good for You: The Effects of Cinema Attendance on Self-Reported Anxiety or Depression and 'Happiness'" the author describes how, "The narrative and representational aspects of film make it a wholly unique form of art. Moreover, the collective experience of film as art renders it a wholly distinct leisure activity. The unique properties of attending the cinema can have decisively positive effects on mental health.

Cinema attendance can have independent and robust effects on mental wellbeing because visual stimulation can queue a range of emotions and the collective experience of these emotions through the cinema provides a safe environment in which to experience roles and emotions we might not otherwise be free to experience.

The collective nature of the narrative and visual stimulation makes the experience enjoyable and controlled, thereby offering benefits beyond mere visual stimulation. Moreover, the cinema is unique in that it is a highly accessible social art form, the participation in which generally cuts across economic lines. At the same time, attending the cinema allows for the exercise of personal preferences and the human need for distinction. In a nutshell, cinema attendance can be both a personally expressive experience, good fun, and therapeutic at the same time.

In a rather groundbreaking study, Konlaan, Bygren and Johansson found that frequent cinema attendees have particularly low mortality risks –those who never attended the cinema had mortality rates nearly 4 times higher than those who visit the cinema at least occasionally (Konlaan, Bygren, and Johansson 2000). Their finding holds even when other forms of social engagement are controlled, suggesting that social engagement specifically in an artistic milieu is important for human survival."

Movies can effectively communicate concepts, ideas and stories. They allow audiences to be cognitively transported to a different time or place and experience life through different eyes-gaining new perspectives, inspiration and understanding. Famed director, Anthony Minghella (The English Patient) states "...fiction becomes this sort of cultural bank balance that we can draw from. We can momentarily be a young woman, an old woman, a black person, an Asian person, a Chinese person and look at the world and argue a position tht is not our own for a while—inhabit a position that is not our own."

Movies also allow audiences to identify themselves, finding shared experiences and role models in the entertainment available at the local movie theater. It is, therefore, vital that communities have access to movie theaters and that the programming caters to the diverse makeup of that community.

## V. CONCLUSIONS/NEXT STEPS

This cursory examination of the data regarding access to movie theaters in Winston Salem suggests that further research could be beneficial in coordinating the programming at the theaters with the surrounding communities and in identifying communities without easy access to movie theaters.

Research shows that the shared screen experience has a positive effect on mood, sense of belonging, socialization and empathy. To that end, the more people attending movie theaters in a community, the better off the economic and social welfare of that community.

The study suggests a number of potentially beneficial lines of follow-up inquiry, including, further research into the contribution of cinema to local economies, its impact on learning and training, the views of non-attenders, and the effectiveness of local cinema in reaching out to particular target groups within the population. Such research could be shared with the local movie theaters in their community outreach.

Additional research should also be conducted regarding areas with no easily accessible movie theaters with surveys taken regarding the impact of no access on those communities.

Surveys should be undertaken to determine the impact on the community in the following areas:

- **Culture.** Questions could be asked of movie-goers to give an indication of the depth of emotional response to cinema and highlight some of the intrinsic effects of local cinema in feeding new perspectives, stimulating interests, and reinforcing one's identity and a sense of community.
- **Wellbeing.** Research suggests that local cinema could be instrumental as a health asset, pointing to ways in which local cinema can help people to feel less alone, foster a more positive mood or outlook, and enable people to cope with everyday stresses. Survey questions could collect data towards this.
- **Community.** Surveys could demonstrate ways in which local film exhibitors are offering a focal point for the community, a safe and trusted place to go, and a way of bringing the community together and fostering pride in community.
- **Education.** Research hints at the role that local cinema can play in supporting learning and training, although this is an area that merits further examination. Movie theaters could champion the local communities' exposure to art, different cultures, history, politics, social issues, justice, etc.
- **Local Economy.** Further research could examine the ways in which local cinema can help retain and recirculate money in the local economy, as an important source of night-time entertainment and a means of attracting visitors, but also through its purchasing power and role as a local employer.



A simple online survey could be conducted at each movie theater using the following suggested questions:

**POTENTIAL ONLINE AUDIENCE QUESTIONS:**

1. Reasons for attending:
  - a. Pure entertainment/escapism
  - b. Thought provoking/moving experience
  - c. Spending time with friends and family
  - d. Treating/rewarding myself
  - e. Checking out the latest releases/FOMO
  
2. Number of visits in the last 12 months:
  - a. 0
  - b. 1-2
  - c. 3-5
  - d. 6-10
  - e. More than 10
  
3. Distance traveled to attend:
  - a. 1-3 miles
  - b. 4-10 miles
  - c. 11-20 miles
  - d. 20+ miles
  
4. Importance to local community:
  - a. Not important at all
  - b. Of limited importance
  - c. Somewhat important
  - d. Extremely important

5. Overall satisfaction with movie theater:
  - a. Very satisfied
  - b. Somewhat satisfied
  - c. Neither satisfied nor dissatisfied
  - d. Somewhat dissatisfied
  - e. Very dissatisfied
  
6. Satisfaction with accessibility: same criteria
7. Satisfaction with film choices: same criteria
8. Satisfaction with atmosphere/services: same criteria
9. Satisfaction with sense of community: same criteria
10. Satisfaction with proximity to local amenities: same criteria

**ACKNOWLEDGEMENTS:**

Thank you to the following for their assistance and guidance:

Dr. Russell Smith, WSSU

Dr. Denise Nation and her students enrolled in GIS Concepts and Techniques, WSSU

Dr. Joseph Sloop