Report to the UK Film Council

A study of cinema access and film consumption for audiences with sensory impairments

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Introduction

Since 2001 the cinema industry has been installing subtitling and audio description equipment in cinema venues to meet the needs of blind and partially sighted and deaf and hard of hearing cinema patrons. The UK Film Council set up a fund to meet some of the costs of doing this in 2003 with the balance met by the cinema industry. Around one third of all cinema sites now have this equipment and most mainstream film releases are now subtitled and audio-described.

The primary purpose of this research was to find out about audiences with sensory impairments for accessible films both at the cinema and on other formats, in particular to try and measure levels of awareness, patterns of attendance, what existing audiences think of the access services currently provided, barriers to access and crucially, how services could be improved. A second part of the research was to explore the potential market for British Sign Language (BSL) interpreted film.

Definitions

The definition of **blind and partially sighted** used in the report is that set by the Department of Health: an individual can register as blind if they can read the top letter of the eye chart from 3 metres or less and as partially sighted from 6 metres or less.

The formation **D/deaf** is used throughout the report. It is used to include those who are deaf as well as those who are part of the Deaf Community (which is normally capitalised). Deaf people who use British Sign Language (BSL) are now seen as a linguistic minority and this forms the basis of the Deaf Community, which consists of many people who share the same language and common cultural experience of being Deaf.

Executive Summary

The Market

There are nearly 9 million people in the UK with some kind of hearing loss and around 2 million who are blind or partially sighted. These disabilities are closely correlated to aging (see section 3.2 and 3.3) and although recent trends indicate that cinema admissions decline with age, there is still a market opportunity which remains under-exploited as well as significant numbers of the population who remain under-served.

- In the population at large, 72% attend the cinema at least once a year. The corresponding figure for D/deaf/hard of hearing is 27% and for blind/ partially sighted is 29% (with audio description).

- 25% of the population as a whole are frequent attenders (once a month or more) whilst only 12% of the blind/partially sighted and 6% of the D/deaf/hard of hearing fall into the same category.

- It has been calculated that approximately 600,000[1] blind and partially sighted people would benefit from audio description. If they attended cinema as often as the general population over £2 million in box office revenues would accrue. This research shows that little of this market is currently being served.

[1] This has been taken as blind or partially sighted people under the age of 75

- If D/deaf and hard of hearing people attended the cinema as often as the general population this would generate 6.4m annual admissions, or around £30m of box office[2]. The research shows that an extra £19 million of box office could be achieved if attendance of this group was increased from its present level to that of the general population.

Accessible screenings

Sites:

- Currently around a third of UK cinema sites have access equipment in at least one auditorium.
- There are around 1,000 shows with subtitles every month and 10,000 with audio description. This represents only a fraction of the total UK screenings (approximately 2% and 20 % respectively).
- The research shows that much of the equipment is under-utilised and only 3% of sites offer 4 or more screenings per week.

Films:

Most mainstream releases have audio description and subtitling files (73 of the top 100 films of 2005)
However, of the 500 or so films released in the UK each year, only 25% are accessible to people with sensory impairments.

[2] This is based on an average ticket price of £4.70

Accessible screenings increase attendance

37% of blind and partially sighted people and 22% of D/deaf and hard of hearing people have increased the frequency of their cinema attendance as a result of the introduction of access features

Awareness of and satisfaction with the service

- 68% of the D/deaf and hard of hearing are aware of the availability of sub titles but only 51% are aware that there is a cinema in their locality which screens them.
- 77% of attenders are aware of the audio description service compared with 57% of non-attenders.
- Satisfaction with the quality of services (where available) is high. 76% of blind/partially sighted attenders and 83% of subtitles users say they are completely satisfied.
- Areas of dissatisfaction such as the legibility of white subtitles on light backgrounds and identifying who is speaking when there is more than one character on screen can be overcome if the cinema industry adopts the best practice protocols already developed for TV broadcasters and the use of digital projection.

Barriers to attendance

The two main barriers to attendance identified in the research[3] were:

- lack of local provision of sub titles or audio description services
- lack of screenings at suitable times

Lack of staff awareness of how to provide an effective service was also referred to but this was a less significant factor.

Improved accessibility would increase attendance

- Both attenders and non-attenders indicated that they would increase their frequency of attendance very significantly if more films were available at more convenient times.
- 83% of D/deaf and hard of hearing attenders and 69% of blind or partially sighted attenders said they would visit 12 or more times a year if there were more screenings at more convenient times.[4]

British Sign Language (BSL) interpreted film

Around 50,000 people in the UK rely on British Sign Language as their primary means of communication although as many as 370,000 people are able to sign. There is currently very limited provision of BSL interpreted film at the cinema although some films are available on television. Most of what is available is ‘live’ for special events. There are few films around with ‘in vision’ BSL interpretation.

During our qualitative research, on the whole, the idea of BSL interpreted films at the cinema was not well-received even

[3] Cited by 40% of blind and partially sighted respondents and 53% of D/deaf and hard of hearing

[4] Even if these intentions are over-stated, it does appear that there is significant opportunity to grow this audience.

among fluent users. There is a small group of people, numbering perhaps 30,000 who would benefit from regular BSL interpreted cinema screenings, in particular children and BSL users for whom BSL is their first language.

During our qualitative research, in general, most people preferred ‘in-vision’ interpreted films rather than live.

Recommendations

General

Industry wide service standards need to be developed in relation to the provision of access features for cinemas. The aim of the standards would be to:

- increase the number of shows with audio-description and captions
- improve staff training and communication with audiences
- promote efficient utilisation of equipment, distribution of films and advertising of performances

Areas of good practice where the service works well should be identified in order to develop good practice models for widespread dissemination.[5]

Distributors of both mainstream films and specialised films who are currently not providing access features on their products should be encouraged to do so.

2. Audio description

There is good evidence from the research that better training for cinema staff could bring about improvements in access and audience perception of the service for blind and partially sighted people.

Key issues for the training are:

- maintenance and operation of hardware (headsets)
- awareness of audio description (AD) for front-line staff

The demographic profile of the audience for audio description is older than cinema audiences generally and they are often not in full time employment.

- The opportunity should be taken to promote cinema-going with audio description specifically targeted at the over 50s. This could involve selecting titles appealing to this market and screening times in the morning or matinee slots.[6]

The availability of audio-described screenings needs to be much better publicised to the blind and partially sighted community. This could include local promotion through voluntary organisations in order to try and build audiences. Audio described cinema screenings should be more widely publicised to general audiences who act as a conduit for information for blind or partially sighted friends and family. This could be done by advertising the availability of an audio-described version at the start of regular screenings or advertising in the cinema foyer and in listings magazines.

- Audio description equipment already installed should be used for all screenings since it is a closed system.

[5] For example Odeon Bath and Odeon Guildford have 5 or more accessible screenings each week)

[6] Recent research by the UK Film Council shows sustained growth in cinema attendance of the over-45 age group (Statistical Yearbook 2006/07, p.2)

This would radically increase the choice of films available to blind and partially sighted audiences.

3. Subtitles

- Consideration should be given to the establishment of industry standards relating to the number of subtitled screenings and the where they appear in the schedule. One suggestion made is that multi-screen cinemas should have 3 different titles across 7 shows each week.

- In the longer term, there should be further investigation of the potential for a ‘closed’ subtitling system (viewable as an option by those who require it) within the new digital environment. This would have the effect of increasing choice for the D/deaf and hard of hearing audience and removing the dependence on limited screening in off-peak slots

4. British Sign Language (BSL) interpreted films

- Consideration should be given to a pilot project aimed at assessing market for BSL interpreted films. This could involve the production of a small number of popular films which could then be distributed and market tested both for cinema and DVD.[7]

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[7] See section 6.10 below

1. Background to the research

1.1 The UK Film Council's cinema access programme

Since the late 1990s, the Disability Working Group of the Cinema Exhibitors Association (CEA) had been exploring ways in which cinema could be made more accessible to blind and partially sighted audiences and D/deaf or hard of hearing audiences. The Working Group comprises exhibitors, distributors, their trade bodies (the CEA and Film Distributors Association) the national voluntary sector organisations (RNIB, RNID, British Deaf Association, National Deaf Children's Society), equipment manufacturers (DTS and Dolby), Freeney Williams and yourlocalcinema.com[8]. At first the focus was on increasing the supply of hard copy subtitled prints (where the captions are burned onto the print) but soft subtitling (where the captions are projected onto the screen via a dedicated projector linked to the picture projector) soon became the industry standard. Today, hard copy prints with subtitles on new releases are very rare (other than for foreign language films where subtitles are used for the general audience). Digital soft titling and audio description require specialist equipment installed in the cinema and the cost of this is an issue for many exhibitors.

Early in 2004, the UK Film Council set up a £300,000 fund to help cinema owners and operators meet up to 50% of the costs of purchasing and installing subtitling and audio description equipment. A total of 78 cinemas were awarded grants. In addition to this, a sum of £60,000 was set aside to help smaller distributors meet the costs of producing captioning and audio description for some of their titles. All UK Film Council funded productions must be produced with captions and audio description.

Since then, the number of sites with subtitling and audio description equipment has more than doubled without further public subsidy, as costs have come down and more and more releases become available with captions and audio description files.

1.2 Research Objectives

The primary purpose of commissioning this research was to find out about audiences with sensory impairments for accessible films both at the cinema and on other formats (e.g. DVD). The research sought to measure levels of awareness, patterns of attendance, what existing audiences think of the access services currently provided, barriers to access and crucially, how services could be improved.

A second part of the research was to look at the potential for British Sign Language (BSL) interpreted screenings, an area which has seen very little research up to now. A full copy of the brief is contained in appendix 1.

1.3 Research methodologies

The bulk of the research contained in this report took place during the three months between September and November 2006. Following preliminary desk research it comprised three core elements:-

1) Qualitative research in the form of three focus groups with D/deaf and hard of hearing people and a series of 14 in-depth, open-ended telephone interviews with blind and

[8] Yourlocalcinema.com is an online service promoting subtitled screenings and other D/deaf cinema events as well as audio described screenings for blind and partially sighted audiences.

partially sighted people. The results of the qualitative research informed the design of the quantitative phase (below). A full participant profile is contained in appendix 2 and discussion guides for both focus groups and in-depth interviews is contained in appendix 3. A summary of the findings from the qualitative research is contained in appendix 4.

2) Quantitative research in the form of e:surveys with D/deaf and hard of hearing people and e:surveys and personally administered surveys via telephone with blind and partially sighted people. We also made personal visits to a number of organisations for blind and partially people to administer around 40 surveys in person. Separate children's versions of both these surveys were also developed. Copies of all the surveys can be found in appendix 5. In total around 900 surveys were returned from the D/deaf and hard of hearing community and 121 surveys for blind and partially sighted people.

3) Two film screenings followed up by 3 focus group discussions with D/deaf BSL users about the viability of BSL interpretation in a cinema context. The screening schedule and discussion plan is contained in appendix 6.

A detailed description of the process used to recruit research participants is included in appendix 7 along with full participant profiles. This includes a note on the particular challenges of recruiting blind and partially sighted people to this – and any other – research project.

2. Cinemas and Distributors – what's available

Attendance at the cinema by any group is shaped by a combination of factors. As well as personal issues such as time, affordability and interest these factors include a range of issues which can be generically referred to as supply side issues: the availability of screens and venues; access issues within venues; releases and advertising of titles.

Key findings

- *Around one third of the UK's cinema sites have the equipment necessary to produce subtitles and audio description in at least one screen.*

- *Most mainstream UK film releases now have audio description and subtitling tracks although there are still a significant number of exceptions (see section 2 of this report). However, this headline figure masks the fact that of the 500 or so films released in the UK each year, only about a quarter are accessible to people with sensory impairments. If the cinema release is not audio-described then the DVD won't be.*

- *There are now around 10,000 audio-described screenings and around 1,000 subtitled screenings every month in the UK. This is a tiny proportion of all film screenings, thought to be somewhere in the range 2-20%*[9]

[9] There are currently no data collected on total numbers of screenings in the UK, this figure is based on an estimate of average weekly capacity x average numbers of auditoria x number of cinema sites.

- *For the 12 months ending September 2006, only five sites offered more than 200 subtitled shows (that's an average of 4 per week), 25 sites having no shows at all, and 84 sites having 50 shows or less. 63 sites offered an average of between 1 and 2 shows per week.*

Recommendations

Distributors who are currently not providing access features on their product should be persuaded to do so.

Reasons for the under-utilisation of equipment need to be established. Anecdotally, there appears to be a problem with disc distribution which makes it difficult to advertise screenings in advance.

A study of cinemas where the service works well (Odeon Bath and Odeon Guildford for example) should be undertaken in order to develop a model of good practice for widespread dissemination.

2.1 Installations [10]

At November 2006 there were 213 cinema sites in the UK (out of a total of around 660) with the equipment necessary to provide soft subtitling and audio description i.e. 32% (see appendix 9 for a full list).

[10] See appendix 8 for summary statistics on installations

Table 2.1 Number of titles without Audio Description or subtitles by distributor

Distributor	No	Titles
Entertainment	13	*A History of Violence, Assault of Precinct 13, Hostage, Hotel Rwanda, Keeping Mum, Monster-in-Law, Saw II, Son of the Mask, The Cave, The Wedding Date, Valiant, Wedding Crashers, White Noise*
UIP	4	*Boogeyman, Coach Carter, Four Brothers, Land of the Dead*
20th C Fox	3	*Cheaper by the Dozen 2, Sideways, Amityville Horror*
Pathe	2	*Crash, Oliver Twist*
Momentum	2	*Broken Flowers, Lord of War*
Sony	1	*Adventures of Shark Boy and Lava Girl*
Optimum	1	*Wolf Creek*
Red Bus	1	*Revolver*

Thirty five of these are in London and the surrounding area, 146 in the rest of England, 16 in Scotland, 7 in Wales and 9 in Northern Ireland (see appendix 10 for a full regional and national breakdown). 155 (73%) installations are at cinemas owned or operated by UK's three largest cinema operators (Vue, Odeon and Cineworld) – see appendix 11 for a breakdown by operator. Both Dolby and DTS have produced equipment which can project soft subtitles and transmit audio description: these systems are not interoperable and some distributors produce access files only for one of the two competing systems. See appendix 12 for a breakdown of installations by manufacturer.

2.2 Films

Lack of film choice is a common complaint among regular cinema goers with sensory impairments, in particular among audiences who prefer the smaller, more thought-provoking films produced away from the Hollywood mainstream.

Somewhere in the region of 500 feature films are released in the UK each year. Although between 70% and 80% of new UK releases now carry subtitles and audio description, this figure masks the fact that around 75% of releases are not accessible to people with sensory impairments. A list of all accessible releases in 2005 is included in appendix 13. Of the top 100 films of 2005, 73 were subtitled and audio-described. Of the 27 which were not, around half were distributed by Entertainment:

In the 3 months from July to September 2006, 51 different films were released with subtitles and audio description. In the last five years 470 films have been released with subtitles and audio description. However, not all films are compatible with both systems. In 2005, 15 releases were available for Dolby only, which is installed in only 33% of cinemas (see appendix 14 for breakdown of films according to availability on each system). This included some of the year's most popular 'specialised' releases including *Capote, The Wind that Shakes the Barley, Pierrepoint, TransAmerica, Memoirs of a Geisha, Vera Drake, Tsotsi, Volver, Ladies in Lavender and Bullet Boy.*

2.3 Shows

On average, there are around 1,000 subtitled and 10,000 audio-described shows in the UK every month. Data is not collected on the total number of cinema screenings each month across the whole of the UK but even if it was as low as two screenings per day on each of the UK's 3,357 cinema screens – an average of 46,998 each week – audio described screenings would amount to just over 20% and subtitled only 2%.

Yourlocalcinema.com analysis suggests that the 10,000 audio-described screenings are accounted for by a large number of screenings of the same film at a small number of cinemas i.e. the range of films on offer is still quite limited and many people do not have access to the service at a cinema near to where they live.

In the 12 months up to May 2007, despite a significant increase in the number of installations (approximately 25%), the number of subtitled and audio-described shows has remained static. The clear inference is that many new systems are not being used and that existing systems are not being used to their full potential.

For example, in the week commencing October 13th 2006, only 52% of cinemas with access equipment showed a film using that equipment. The figures were affected by fact that the number one movie 'The Departed' was not available with subtitles and audio description although 8 of the ten films released that week were. However, it is fair to say that in general many sites with the equipment are not offering shows on a regular basis.[11]

In that same week, of the three largest operators Odeon and Cineworld utilised their equipment at around 50% of sites. Vue did much better with 70%. Other operators (the independents and smaller chains) performed worst with around 30% using the equipment. [12] Appendix 15 contains a table detailing the number of shows offered at the UK's sites (excluding NI) for the 12 months ending September 2006. Only five sites offered more than 200 subtitled shows (that's an average of 4 per week), 25 sites having no shows at all and 84 sites having 50 shows or less over the year. 63 sites offered an average of between 1 and 2 shows per week. If more than 200 (about 4 per week) was taken as a reasonable number of shows in a year, under 3% of sites are achieving this.

However, it is not just the numbers that matter. One of the main complaints about the screenings on offer is where they fall in the programme. Subtitled shows are often given the 'graveyard' slots – mid-week afternoons or Sundays for example. Our qualitative research shows that deaf people want not only a choice of films but to be able to see them at the same time most other people go to the cinema – on evenings and weekends.

2.4 Digital cinema and the Digital Screen Network

The film distribution and exhibition industry is in transition from traditional 35mm film stock to digital formats and it is anticipated that ultimately almost all 35mm projection systems will be replaced by digital projectors. Unlike 35mm film projectors, digital projectors may be able to insert subtitles on

[11] Note: as at May 2007 (after the initial findings were reported) systems installed in the last six months are now being utilised. There has been a 22% increase in subtitled and described shows since October 2006. 61% of cinemas had shows in the last week of March 07.

[12] Note: as above there have been improvements in the last 6 months. New averages: Odeon: 61%. Cineworld 94%. Vue 94%. Others fluctuate between 60 - 80% useage.

demand without the need for additional equipment, subject to the resolution of some technical challenges.[13] The process of installing digital projectors has already started with some 200 being installed across the country, many part-funded by the UK Film Council through the National Lottery as part of the Digital Screen Network (DSN) and in the longer term most or all cinemas will have digital equipment and therefore the potential capacity to show accessible screenings. See appendix 16 for a fuller technical explanation.

At the moment, there is a very short supply of digital film content available with the relevant files. One of the difficulties is that subtitles and audio description would need to be available at the post production phase for incorporation into the film. With the existing systems, subtitle and AD files can be added at a later stage in the process of the film's release. Arts Alliance, technical partners in the Digital Screen Network project, are working to resolve the software problems and think this can be done by creating a 'top up' package that can link into an existing digital film. Cinemas however, will be required to install infra-red systems in auditoria where they do not already exist so that the AD tracks can be heard through headphones.

[13] Note: at May 2007 since preliminary findings were reported there have now been a handful of digital releases with embedded subtitles and audio description. Some cinemas have utilized these features and screened subtitled shows on the DSN systems which seems to work. But of course cinemas need an infra red system and headphones to broadcast audio description.

3 Demographics and Audience Characteristics

3.1 UK general cinema attendance

The Film Council Statistical Yearbook 2005/06[14], reveals the following market factors, for the overall population:

- 72% of the population go to the cinema at least once a year
- 25% attend once a month or more
- Men and women attend in similar proportions
- A significantly higher proportion of younger people attend

Arts Council England figures[15] show that film attendance declines with age and drops off very significantly after 75. Whilst UK Film Council RSU Yearbook figures provide a single 'over 35' group, they do show that over 35s make up a very significant proportion of frequent attenders.

[14] RSU Statistical Yearbook 2005/06, UK Film Council

[15] Arts in England 2003 – attendance, participation and attitudes, Arts Council England, December 2004

Table 3.1 Percentage attending a film event in last 12 months by age

Age	% attending
16 – 24	88
25 – 34	79
35 – 44	73
45 – 54	61
55 – 64	45
65 – 74	31
75+	16
All	59

Table 3.2 Proportion of population seeing at least one film per year

Age	See at least one film per year – proportion of population
7 – 14	93
15 – 24	91
25 – 34	85
35+	61

Table 3.3 Percentage of total cinemagoers by age

Age	% of total cinema goers (one or more visits per month)
4-14	23
15-24	23
25-34	21
35+	33

(Source:Arts in England 2003, attendance, participation and attitudes)

Disabled people overall are under-represented in the cinema going audience. Disabled people account for 13.5% of the population aged 12-74 but only 7.4% of cinema attenders. Non-disabled people account for 86.5% of the population but 92.6% of cinema-goers. Retail video/DVD is the only method of film watching in which disabled people reflect or are higher than their population proportion, making up 15.2% of the market.

3.2 Blind and partially sighted people

Overall, RNIB estimate that two million people 'self-define' as having a sight-problem or seeing difficulty. This equates to 3.4% of total UK population.
There are 311,910 people within the UK population (0.5%) who are registered as blind or partially sighted. Of these, half are blind and half partially sighted. It would be reasonable to assume that the balance of the 2m people who are not registered are partially sighted rather than blind. This means that blind people make up 8% of the blind and partially sighted population and partially sighted people 92%. The behaviour patterns in relation to film consumption for these groups is different and we cross tabulated the data from the quantitative survey for blind or partially sighted respondents and have highlighted any significant differences in section 4.

The overall market for audio description services in cinemas is relatively small in size, probably in the order of 600,000 people (i.e. under 75 year olds who are blind or partially sighted). If blind and partially sighted people attended the cinema as often as the general population (72% go at least once a year), this would equate to 1,440,000 admissions, or £6.77million of box office. Even if over 75 year olds are excluded from the calculation, over £2 million in box office revenues could be generated, based on an average ticket price of £4.70. These are conservative estimates as they do not include frequent cinema-goers, accompanying friends and relatives or ancillary revenues from kiosk and bar sales. At the moment, it is thought that very few blind and partially sighted people are going to the cinema (cinema attenders were heavily over-represented in our sample).

By way of comparison, OFCOM[16] research into provision of access services in television also states that awareness and take-up of audio description is low.
In the OFCOM research around 37% of blind and partially sighted people said they were aware of audio description; only around a fifth (22%) of visually impaired respondents who

[16] Provision of Access Services, Research Study Conducted for OFCOM, March 2006

had heard of audio description say they use it at least sometimes when it is available.

3.3 D/deaf and hard of hearing people

There are an estimated 8,945,000 D/deaf and hard of hearing people in the UK and the vast majority of these (over 70%) are over 60 and of these most are mild to moderately deaf. Two million people wear hearing aids. There are also 23,000 deafblind people in the UK.
The following table shows a further breakdown for the 16-60 age bracket. This shows quite clearly how deafness is closely correlated to aging. However, there are nearly half a million D/deaf or hard of hearing people aged 40 or less.

The overall potential market for subtitling services in cinemas is large. If D/deaf and hard of hearing people attended the cinema as often as the general population (72% go at least once a year), this would equate to 6.4m annual admissions, or around £30m of box office based on an average ticket price of £4.70. Our survey indicates that around 27% are currently attending. This means that around £19m in box office revenues is still available. These are conservative estimates as they do not include frequent cinema-goers, accompanying friends and relatives or ancillary revenues from kiosk and bar sales. Our survey also indicated that young deaf people go to the cinema in equal or greater proportions than the hearing population.

Table 3.4: Deaf an hard of hearing aged 16 – 60 in UK[17]

Age	Mild/ moderate deafness	Severe/ profound deafness	Total
16-20	59,000	5,000	**64,000**
21-30	126,000	9,000	**135,000**
31-40	238,000	24,000	**262,000**
41-50	622,000	24,000	**646,000**
51-60	1,320,000	46,000	**1,366,000**
Total 16-60	**2,365,000**	**108,000**	**2,473,000**

[17] Source: Medical Research Council
Figures rounded to nearest thousand

4. Film consumption by blind and partially sighted people

Key findings

- *The overall market for audio description services in cinemas is quite small in size, probably in the order of 600,000 (i.e. under 75 year olds who are blind or partially sighted). A total of 2m people (3.4% of the UK population) have some level of sight problem.*
- *Where audio description (AD) works well the experience of watching a film is completely transformed for a blind audience member with a very high level of satisfaction (75%).*
- *89% of attenders and 76% of those who have not attended in the last 12 months, do not watch audio-described films at the cinema as often as they would like*
- *For blind people a sense of social inclusion is one of the main factors motivating a visit to the cinema. Around a third are also motivated by the quality of the sound and picture at the cinema, and particularly the fact that the large screen makes images easier to see and this is particularly significant for partially sighted audience members.*
- *Partially sighted people are attending significantly more frequently than blind people. 14% of blind people are attending 12 times a year or more compared to 27% of partially sighted people.*
- *More than half of non-attenders (53%) are not aware if there is any local provision for screening audio-described films.*
- *37% of the sample has attended more frequently since more audio-described films have been available.*
- *The main barriers for attenders are*
    - *lack of information (26%),*
    - *lack of screenings at convenient times (19%).*
- *For almost a third of attenders (28%) and 14% of non-attenders, better promotion of audio-described screenings would increase attendance.*
- *DVD/video is an important means of accessing film for blind and partially sighted people.*
- *72% of non-attenders prefer to watch films either on television or DVD/video*
- *a third of both attenders and non-attenders had seen a film on video or DVD in the last 12 months.*
- *In the qualitative research it emerged that many blind people find the menus on DVDs difficult to navigate.*

- **Additional Points**

- There is good evidence from both the qualitative and quantitative research that better training for cinema staff could bring about improvements in access for blind and partially sighted people.
- Key issues are maintenance and operation of hardware (headsets) as well as awareness of audio description for front-line staff.
- As much of the audience is older and often not in full-time employment, there are opportunities to promote cinema-going with AD specifically targeted at the over 50s.

- The availability of audio-described screenings needs to be much better publicised to the blind and partially sighted community.
- This could include local promotion through voluntary organisations in order to try and build audiences.
- AD cinema screenings should be more widely publicised to general audiences. This could be done, for example, by advertising the availability of an audio-described version at the start of regular screenings, in the cinema foyer and in listings magazines. Many people find out what is on from friends and family, sighted audiences will be interested in what is audio-described and can pass on the information.
- Choice for blind and partially sighted audiences could be expanded by use of already installed equipment for every screening in that auditorium.
- Cinema operators should identify which screenings are audio described on their recorded telephone information lines or which cinemas have the equipment, instead of having to speak to the operator.
- Access options on DVDs should include a menu which is more accessible than existing menus. This will require development of an agreed industry standard.

Note on the Research Sample

The survey achieved a sample of 121 people from a target of 300. A more detailed account of how the sample was arrived at used is given in appendix 7.

Very few blind and partially sighted people go to the cinema and this research has tended to attract the participation of attenders in disproportionately high numbers. Demographics also play a part and many blind and partially sighted people are older. This means they often have disabilities which may affect their mobility and so be less likely to engage in cultural activity outside their home.

Of the sample,

- 61% have attended cinema in the past 12 months, compared to 71% of the population overall.
- The age profile of the sample also reflects the fact that, due to its self-selected character, it contains significantly more cinema attenders than we believe are found in the overall blind and partially sighted population.
- 74% of the sample are aged 16-64, compared to 20% of all blind and partially-sighted people falling into this age group.
- In comparison, an estimated 27% of all D/deaf and hard-of-hearing people attend cinema.

The survey evidence should be read in this context of these factors. However, where the figures do show very significant differences we believe they will reflect the market.

In the data tables, people who have not visited cinema in the previous 12 months are described as 'non-attenders' and those who have visited as 'attenders.

4.1 Behaviour and Attitudes to Film

The qualitative and quantitative research sought to explore a range of issues concerning the film viewing behaviour and preferences of blind and partially sighted people including frequency of attendance, and the question of where and how blind and partially sighted people prefer to watch films. It also explored whether attendance has increased since audio-described films have been more available and the reasons for any increase.

4.2 Preferred ways of watching films

There was strong evidence that people within the sample were keen to experience film: even given the self-selection of the group there is clearly a strong desire to participate in film culture and the mainstream film-watching experience. In common with the population as a whole, there is a strong bias (76%, rising to 90% for frequent attenders) toward watching films in mainstream, multiplex cinemas. Of those who have visited the cinema in the past 12 months, 50% prefer to watch at the cinema; 39% with audio description and 11% without. Of those who have not visited cinema in the previous 12 months, 36% prefer to experience films on television, 36% DVD/ video. Even amongst this non-cinema attending group almost 20% would still prefer to watch films in the cinema.

Table 4.2 Preferred Method of watching film

What is your favourite way to watch films?	Attender %	Non-attender %
On television	15	36
On DVD or video	23	36
Online	-	-
At the cinema - with audio description	39	2
At the cinema - without audio description	11	15
No preference	12	11

4.3 Why do blind and partially sighted people go to the cinema?

A sense of social inclusion is the key reason that blind or partially sighted people like watching films at the cinema. More than a third of our survey respondents cited this as a motivation and this was heavily borne out during the qualitative interviews :

"[When I watch Audio Described films at the cinema] I feel in the world. You get to watch films at the same time as everyone else"

"I just love it… it makes me feel part of society again… no exclusion, I become auto-independent"

Around a third are also motivated by the quality of the sound and picture at the cinema, and particularly the fact that the

Table 4.3 Benefits of watching films at the cinema

	Benefits of watching films at the cinema, rather than on television/DVD/video/online?	Attenders %
Social / inclusion	I like the social experience of going to the cinema to see a film	29
	I want to be able to discuss new films with other people	2
	I want to see films as soon as they are released	2
	Able to listen to audio description privately	5
Product / quality	Sound and picture is better at the cinema	34
	Can be seen better on a large screen	10

large screen makes images easier to see and this is particularly significant for partially sighted audience members.

4.4 Frequency of cinema attendance?

Whilst motivations for cinema attendance are similar to those of the population as a whole, blind and partially sighted people still attend cinema less frequently than the general population.

According to UK Film Council data, 25% of the population attend more than twelve times a year, whilst only 12% of the blind and partially sighted sample do. Similar proportions of blind (61%) and partially sighted cinema attenders (57%) are attending cinema at least once a year, and partially sighted people are attending significantly more frequently than blind people. 14% of blind attenders are attending 12 times a year or more compared to 27% of partially sighted attenders.

Table 4.4 Frequency of attendance of Blind / Partially sighted people

Frequency of films watched in last 12 months by BPS	0	1 or more	1 %	2-5 %	6-11 %	12+ %
Cinema - with audio description	71	29	9	12	5	3
Cinema - without audio description	50	50	7	26	12	5
Any cinema	39	61	6	27	16	12

4.5 How many people are aware of the service?

The UK Film Council's Cinema Access Programme was created on the hypothesis that audio description was a key accessibility modification for a group of people of significant size. The research wished to test this hypothesis and the level of awareness of audio-described films and access provision in cinemas following the substantial increase in provision which the cinema access programme gave rise to.

77% of attenders in the last 12 months are aware that cinemas now have the equipment to provide audio-described films, but this drops to 57% for non-attenders. Interestingly, a greater proportion of blind people (90%) are aware that audio-described provision exists and that cinemas have the equipment to screen audio-described films (84%), as compared to partially sighted people, where only 61% are aware of provision.

Awareness of local provision is however lower with only 52% of attenders knowing that there is a cinema nearby which screens audio described films and only 23% of non-attenders.

4.6 How satisfied are they with the service?

Satisfaction with audio description at the cinema is high **-** more than three-quarters of those who do attend are satisfied with audio description at the cinema:

"Well it is amazing. It is so different you can't imagine. You've had to put up with it for so long… the only way I can describe it [watching films without AD] is like reading a book where some pages have been torn out"
-qualitative research interviewee

"I can't fault Audio Description, I just wish there was more choice"
-qualitative research interviewee

Table 4.6 Satisfaction with last audio described film

Satisfaction with last audio-described film at cinema	% Attenders
Satisfied	76
Neither satisfied not dissatisfied	12
Not satisfied	11

4.7 Have access features increased attendance?

Overall, a quarter (25%) of blind and partially sighted cinema attenders have attended more often since audio-described films have become more widely available at the cinema.

37% of current attenders (in the last 12 months) have attended more often compared to 6% of non-attenders (not in the last 12 months).

Significantly more blind people have attended more often (35%) than partially-sighted people (11%). Clearly, audio description provides a stronger incentive for blind people than partially-sighted.

Of those who had attended cinema in the previous 12 months, 29% had used audio description.

Younger people (15-24) are more likely to prefer to watch films at the cinema without audio description (19%) than with (13%).

Both 25-34 year olds and 35-64 year olds are significantly more likely to prefer attending cinema with audio description than without. 45% of 25-34 year olds prefer with audio description compared to 5% without. 28% of 35-64 year olds prefer attending with audio description than without (9%).

Table 4.7 Has audio description increased attendance?

From 2003 audio-described films have become more widely available at the cinema. Since then have you...?	Attender %	Non-attender %
Not attended any audio-described films at the cinema	41	87
Attended more audio-described films?	37	6
Attended about the same?	18	2
Attended less often	4	4

4.8 Planning a cinema visit?

Information sources
www.yourlocalcinema.com is the primary source of information for just under a fifth (18%) of the sample equivalent to word of mouth (18%) and followed by RNIB's cinema information email list (16%).

Use of information sources vary by age.

- 22% of 15-24 year olds use www.yourlocalcinema.com, compared to 40% of 25-34 and 10% of 35-64.
- 22% of 15-24s use other internet sites and 10% of 25-34 year olds but not over 35s.
- Over 65s rely on only three methods of information: RNIB's email list (40%); cinema operators' telephone lines (40%) and via organisations (20%).

Table 4.8 Main source of information about audio-described films

What is your MAIN source of information about audio-described films at the cinema?	Sample %
www.yourlocalcinema.com	18
Word of mouth	18
RNIB's cinema information email list	16
Cinema operators' websites	13
Cinema operators' telephone information lines	11
Via organisations	4
Talking newspaper	2
Advertisements in papers/magazines	4
Other internet sites/listings	7
Posters or information in the cinema	7
Teletext	-

4.9 What stops people going to the cinema?

89% of attenders and 76% of those who have not attended in the last 12 months, do not watch audio-described films at the cinema as often as they would like.

So what has put them off or prevented them? The main barriers for attenders are lack of information (for 26%), followed by lack of screenings at convenient times (19%). Around 10% of the sample felt they had some problems booking their cinema tickets. The problems included staff

Table 4.9 The most common problems with headsets

Problems with cinema headsets	% Attenders
Headsets often broken	33
Uncomfortable	14
Too loud	5
Batteries run down / not charged	10
Other	38

being uninformed about audio description and an inability to get the CEA discount when booking online.

"I wouldn't know where to ring [for information on what's on at the cinema]… it was just such a hassle that I just said 'forget it'. They just don't let you know. If local blind societies know then they can let their members know… but if we're not notified how can we know? And then they wonder why people don't use it [the AD service]"

"I prefer talking books. I don't go to the cinema or theatre anymore because finding out what's on was such a chore, I just gave up"
-qualitative research interviewees

Of those who had watched audio-described films, 28% reported mainly technical problems.
Quality of the hardware was the key problem in that the headsets are often broken (33%) or the batteries not charged (10%). 14% find them uncomfortable.

For non-attenders the key barriers are more access related such as actually getting to the cinema and home again (16%) and finding the way around the cinema (9%), lack of someone to attend with (11%) but also lack of information (13%).
Taking all of these factors together there is good evidence that better training for cinema staff could bring about improvements in access for blind and partially sighted people. Key issues are maintenance and operation of the hardware (headsets) as well as awareness of audio description for front-line staff.

4.10 What might persuade them go to the cinema, or go more often?

For almost a third of attenders (28%) and 14% of non-attenders, better promotion of accessible films being screened would motivate increased attendance. For attenders, another motivating factor is a greater range of films (19%). For non-attenders, greater accessibility in the cinema would increase attendance (12%).

Table 4.10 Motivations to attend AD films in the future

Motivations to attend audio-described films at the cinema at all or more often in future		Attenders %	Non-attenders %
Provision	More films have audio description	19	10
	More audio-described screenings (times)	10	12
	More local cinemas showing audio-described films	9	7
Promotion	Better promotion of audio-described films	28	14
Price	If it was cheaper to attend	3	-
Physical Access	More accessibility in the cinema	3	12
Customer Care	Better staff knowledge of audio description and how to deal with blind and partially sighted people	3	5
Audio description	Better audio description	1	2
	More comfortable headphones	-	-
	If I knew the headphones would work	-	-

Twenty five percent of non-attenders said they would not attend in future, as did 3% of attenders. Five % of non-attenders and 4% of attenders said they would attend "same as now".

The remainder said they would increase the frequency of attendance with 69% of attenders saying they would attend 12 or more times a year, as compared to just 20% of attenders attending 12 or more times a year in the last 12 months.

Similarly, 58% of non-attenders suggested they would attend 12 or more times a year.

These may be over-optimistic projections, further skewed by the small sample size but it does indicate that there is potential to increase attendance among current attenders.

The data suggests that it is those who are already attending relatively frequently (3 to 5 times a year and 6-10 times a year) who would increase their attendance most.

Table 4.11 How much more often would you go?

Potential attendance	Sample %	Attenders %	Non Attenders %
Not attend in future	11	3	25
"Same as now"	5	4	5
1 - 2	2	1	3
3 - 5	4	3	5
6 -10	6	6	5
11	-	-	-
12+	64	69	58
"More often"	8	13	-

Table 4.12: Barriers to attending Audio Described films

Barriers to attending audio-described films at the cinema			
		Attenders %	Non-attenders %
Provision: films	The films I want to see aren't audio-described	-	-
Provision: screenings	The films aren't on at convenient times	19	4
	Audio-described films are not on at the cinema most convenient for me	9	2
	Films which are advertised as being audio-described aren't always on when you get there	1	-
Promotion	Lack of information about what audio-described films are on	26	13
Price	Cost of attending the cinema	1	2
Access	I find it difficult to get to the cinema and home again	3	16
	Finding my way around the cinema is difficult	3	9
	No-one to go with	3	11
Customer Care	Previous bad experience at cinema	-	-
	Because of my blindness / partial sight I don't feel welcome in the cinema	-	-
	Staff not knowing anything about the audio description or headsets	10	-
	I don’t feel welcome in the cinema	-	2
Audio description	I don't think the audio description is good enough	9	-
Headsets	The headsets don’t always work	-	-
	The headsets aren’t of good enough quality	-	4
Other		7	29

5. Film Consumption by D/deaf and hard of hearing people[18]

Key findings

- Cinema attendance among D/deaf and hard of hearing people is low with only 27% having attended a screening at least once in the past 12 months compared to 72% in the wider UK population.
- Only 6% of D/deaf and hard of hearing people are defined as 'frequent attenders'[19] compared to 25% of the population overall.
- 22% of our sample say they attend the cinema more often than they used to since subtitles have been made more widely available.
- 62% do not visit the cinema as often as they would like.
- Around half our sample of attenders said they preferred to watch films at the cinema (as opposed to TV or DVD/video) and as many as 25% of non-attenders still expressed a preference for cinema films.
- D/deaf and hard of hearing people in the younger age groups are attending in equal or greater proportions than the population overall.
- 68% were aware of the availability of subtitling at cinemas although only 51% are aware of a local cinemas which screened them.
- The key barriers to attendance are: -
  - Films not screened at convenient times (31%)
  - lack of local provision (21%)
- Problems booking tickets were experienced by approximately 50% as a result of cinema staff having problems engaging with D/deaf/hard of hearing people.

Recommendations

1. There is a need for: -
   - more subtitled screenings
   - more films being subtitled
   - subtitled screenings being shown at more convenient times.

   Industry standards need to be established on the numbers of subtitled screenings available and where they fall in the schedule.

2. The need to raise awareness and provide training for front of house staff and venue managers should be addressed as a matter of urgency. Consideration should be given to: -
   - conferences for the exhibition and distribution sector of the film industry
   - training day(s) for venues managers
   - development of a training material for front of house staff, possibly on DVD,

   all of which should be directed to practical steps to increase and improve access for D/deaf and hard of hearing patrons.

3. Exhibitors need to ensure that their induction loop

[18] For a full report on quantitative survey findings please see appendix 17
[19] Those attending at least once per month

systems[20] and headsets are working properly. These items need regular checking and maintenance.

Distributors who are currently not providing access features on their product should be persuaded to do so.

There is still a feeling in some quarters that an open system, since it relies on scheduling mainly in off-peak slots, cannot provide the level of choice required by D/deaf and hard of hearing cinema patrons. There should be a further investigation of the potential for a closed subtitling system within the new digital environment. In the USA a Company called Georgia Tec are currently working on a personal caption device which is likely to be an improvement on the existing Rear Window systems.

Note on the Research Sample

In analysing the unweighted data for the deaf and hard of hearing population survey, it became evident that the sample was heavily biased towards those in this population with a propensity to attend cinema. In order to address this issue, where appropriate the data was weighted retrospectively to ensure that it was representative of the deaf and hard of hearing population generally. See appendix 19 for how the weighting calculations were made.

The data was also weighted to reflect the age breakdown of the deaf and hard-of-hearing population.

[20] see appendix 23 for a technical note on induction loops

5.1 Behaviour and Attitudes to film

The qualitative and quantitative research sought to explore a range of issues concerning the film viewing behaviour and preferences of D/deaf and hard of hearing people including frequency of attendance, and the question of where and how D/deaf and hard of hearing people prefer to watch films. It also explored whether attendance has increased since sub-titled films have been more available and the reasons for any increase.

5.2 Preferred ways of watching film

Almost equal proportions of deaf and hard of hearing cinema attenders prefer to watch films on television, DVD or video (45%) as prefer to watch films at the cinema (48%). Of non-attenders, 65% prefer to watch on TV, video, DVD although even within this group, 25% would still prefer to watch films at the cinema. Of those who prefer to watch films at the cinema, almost all prefer to watch with subtitles.

Table 5.2: Preferred ways of watching film

What is your favourite way to watch films?	Sample	Attenders	Non-attenders
On television	11%	8%	48%
On DVD or video	34%	37%	17%
Online		-	-
At the cinema - with subtitles	40%	47%	25%
At the cinema - without subtitles	6%	1%	1%
No preference	9%	7%	11%

5.3 Why do D/deaf and hard of hearing people go to the cinema?

Social inclusion is by far the most important motivation for watching films at the cinema, cited by 46% of attenders. This was borne out by the focus group participants:-

> *"When I go there it is very much a social event like she said. You go for the popcorn and there is the big screen there and the lights go down and you get this huge sound and this massive picture and that is great". Infrequent Attender*
>
> *"It is a really beautiful atmosphere when you go to the cinema. Especially when you go with your friends. And I feel that it could become a habit, whether you go with friends or by yourself just to see the film. I mean if you wait to see it on the TV or until it is released on DVD it is not the same. I like to see it on the cinema." Current* Attender

Table 5.3 Benefits of watching films at the cinema

Benefits of watching films at the cinema, rather than on television/DVD/video/online?		
Social / inclusion	I like the social experience of going to the cinema to see a film	46%
	I want to be able to discuss new films with other people	2%
	I want to see films as soon as they are released	17%
Product / quality	Sound and picture is better at the cinema	14%
	Some films are better to see on a large screen	9%
Other	Other	13%

5.4 How often do they go?

Not only do fewer deaf and hard of hearing people attend cinema, but those who do, attend less frequently.

The proportion of deaf and hard of hearing people who attend at least once a month is just 6%, compared to 25% of the overall population who attend at least once a month. However D/deaf and hard of hearing cinema attendance is sharply affected by age. This research suggests that deaf and hard of hearing younger age groups are attending in greater proportions than the population overall – 100% of 14 or under and 97% of 15-24s compared to 93% and 91% in the population. The fall off in attendance for deaf and hard of hearing people aged over 35 is dramatic. 61% of over 35s in the general population attends at least once a year, but in the deaf and hard of hearing population only 13% of 35-64 year olds and 3% at 65+.

Table 5.4 Ways of viewing film

Frequency of films watched in last 12 months	0 %	1 %	2-5 %	6-11 %	12+ %
Television	0	0	13	17	70
DVD / video	12	3	30	16	40
Online	0	0	0	0	0
Cinema: with subtitles	69	4	17	6	4
Cinema: without subtitles	82	4	9	3	2
Any cinema	73	3	12	7	6

5.5 Awareness of the Cinema Access Programme

The UK Film Council's Cinema Access Programme was created on the hypothesis that subtitles are a key accessibility modification for a group of people of significant size. The research wished to test this hypothesis and the level of awareness of subtitled films and access provision in cinemas following the substantial increase in provision which the Cinema Access Programme gave rise to.

Awareness that subtitled films exist is high (68%). It is higher among attenders (86%) than those who have not attended in the past 12 months (62%).

Just under three-quarters (71%) are also aware that cinemas now have the equipment to screen subtitled films.

Awareness is consistent across all age groups, apart from the over 65s, where 46% are aware that subtitled films exist and 46% that cinemas now have the equipment to screen these films. This is the age-group which is significantly less likely to attend.

Just 51% know that there is a cinema nearby which screens subtitled films, 25% believe there isn't, 24% don't know. This of course may reflect the uneven distribution of screens across the UK.

Awareness of cinemas nearby screening subtitled films is, understandably, higher among attenders than non-attenders. 74% of attenders are aware, compared to 43% of non-attenders.

5.6 Satisfaction levels with the current service?

Although there was comparatively high satisfaction with the technical aspects of subtitling (83%), there was a range of comments on the viewing experience – and for some these issues did form a substantial disincentive. The main problem

Table 5.7: Have access features increased attendance?

with subtitles is that they can be difficult to see (38%), primarily because they are white, which is sometimes difficult to read if the background is light in colour. (This is understandably worse for older people who may also have vision problems). All those aged 65+ cited subtitles being difficult to see because of their colour as a barrier. This problem will not arise with digital systems as a shadow effect can be placed on the subtitles.

Few respondents feel the subtitles should be literally word-for-word (3%). Stronger feelings about this were expressed in the qualitative research:

> *"I found that really annoying … I actually walked out halfway through and I didn't want to watch it anymore … They were making the text easier to read because like long words and stuff like that they thought deaf people wouldn't be able to understand them."*
> Young Attender

> *"The point of subtitles is so that you do get all the access to what is going on and if you are going to edit it then it means that you have not got full access to it. I think there should be full access and that is the end of it."*
> Infrequent / Potential Attender

However, these were not been borne out in the quantitative research.

5.7 Do they attend more often since the arrival of access features?

Deaf and hard of hearing people now watch more subtitled films at the cinema. Since subtitled films have become more widely available just over one-fifth (22%) of this audience has attended more films at the cinema.

Despite these increases in attendance, there is clear evidence that there is capacity for continuing growth. 62% stated that they do not watch subtitled films at the cinema as often as they would like. 65% of attenders felt this and 60% of non-attenders so there is unmet demand.

Table 5.7 Have subtitles increased attendance

From 2003 subtitled films have become more widely available at the cinema. Since then have you...?	
Not attended any subtitled films at the cinema	53%
Attended more subtitled films?	22%
Attended about the same?	16%
Attended less often?	9%

5.8 Planning a cinema visit?

Information sources

The overwhelming source of information about subtitled screenings is www.yourlocalcinema.com with 80% of the sample saying it was their main source of information.

> *"I would say the listings [www.yourlocalcinema.com] are fantastic. Regular, every Thursday, but (provision) is a lottery and it depends where you live."*
> Infrequent / Potential Attender during a focus group

Internet sources overall are the main source of information for 83%. However for over 65s, 84% rely on word of mouth

5.9 Is there anything that stops D/deaf people watching sub titled films?

Most D/deaf people (62%) do not watch subtitled films at the cinema as often as they would like.

So what has put them off or prevented them? The strongest barriers to attendance are lack of screening provision. This is primarily films not being on at convenient times (31%), but also a lack of local provision of subtitled screenings (21%).

Focus group participants made the following comments:

> "A hearing person … can go to the cinema when they want. They don't have to do all this coordination of um I'll go on the third Tuesday of the month at 3 minutes past five in the afternoon."
> Current Attender

> "Subtitles are on at specific times and so you can only go on those limited dates and so that is difficult."
> Infrequent/Potential Attender

> "I like to go to the cinema, but I can never really find much with subtitles on and I always have to give like a week's notice before they put on the subtitles, which is

quite annoying, because you don't really know if you want to go to the cinema in a weeks time."
Young Attender

A bad or disappointing cinema experience has a strong effect on the propensity to pay a repeat visit:-

"We asked why [an advertised subtitled film wasn't screened] and they said that the subtitled films are passed around and shared between cinemas and so there was a delay as to when they received that film. And I felt that they let me down really … I wouldn't go again."
Infrequent / Potential Attender

Customer care, in the form of cinema staff knowledge of and welcome to deaf and hard of hearing cinema attenders emerged as a strong issue in the qualitative research:

"It is very important that all staff … in cinemas have deaf awareness training, have some level of sign language ability and an end to this kind of, 'Oh you are deaf, you are hard of hearing, you will have to wait to speak to this person'. Or, 'you are not as important, we have got a load of people here trying to get through into the cinema, you will just have to wait for the headset, which isn't here it is over there and 3 miles away, and you have to wait 20 minutes."
Current Attender

Around half of attenders (46%) feel they have had some problems booking their cinema tickets. The primary problem is lack of staff knowledge in how to engage with deaf and hard of hearing people (25%).

Table 5.8 What are the problems booking tickets

Problems booking cinema tickets	
Communication problems with staff	15%
Staff are uninformed about provision	6%
Given incorrect information	5%
Staff don't know about CEA card	3%
Other	7%
None	54%

Table 5.9 What prevents people watching subtitled films at the cinema?

MAIN things that have put people off or actually stopped them watching subtitled films at the cinema		
Provision: films	The films I want to see aren't subtitled	4%
Provision: screenings	The films aren't on at convenient times	31%
	Subtitled films are not on at the cinema most convenient for me	21%
	There aren't enough screenings of subtitled films	2%
	Films which are advertised as being subtitled aren't always on when you get there	1%
	Subtitled films aren't always available as soon as the film is released	1%
Promotion	Lack of information about when subtitled films are on	9%
Price	Cost of attending the cinema	3%
Access	I find it difficult to get to the cinema and home again	0%
	Finding my way around the cinema is difficult	4%
	No-one to go with	4%
Customer Care	Previous bad experience at cinema	4%
	Because of my deafness I don't feel welcome in the cinema	2%
	Staff not knowing anything about the subtitles or the induction loop	0%
Subtitles	I don't think the subtitles are good enough	2%
Induction loop	The induction loop doesn't always work	0%
	The induction loop isn't of good enough quality	0%
Other	Other	16%

5.10 What would encourage increased cinema attendance?

Perhaps unsurprisingly, the main factor which would encourage growth in attendance is for more subtitled screenings (43%) and progress toward ‘normalisation’ of the D/deaf person’s cinema-going experience. A focus group participant commented:

“Oh definitely to have subtitles more often and to have it like everywhere that you can just go up and ask them to put it on and just go in there and watch it without having to wait a week or something like that.”

Other things which were mentioned in the focus groups were:

- More contextual / background information in subtitling
- Raising awareness of www.yourlocalcinema.com
- Raising awareness of Cinema Exhibitors Card

Table 5.10 What would encourage cinema attendance?

What would cause you to attend the cinema at all or more often in future?		
	Base No Reply	882 178
Provision	More subtitled screenings (times)	43%
	More cinemas showing subtitled films	17%
	Better variety of films with subtitles	6%
Promotion	Better promotion of subtitled films	15%
Price	If it was cheaper to attend	5%
Subtitling improvements	Better subtitling (size)	0%
	Better subtitling (colour)	0%
	Better subtitling (language used)	0%
	Better subtitling (detail)	0%
Induction loop improvements	Better induction loop system	2%
Customer Care	Better staff knowledge	

5.11 How much more frequently might they go?

62% stated that they do not watch subtitled films at the cinema as often as they would like. 65% of attenders felt this and 60% of non-attenders. Thus a large proportion of the potential market is not being catered for.

83% suggest they would attend more than 12 times a year. We believe this is highly unlikely given that only 25% of the overall population attend 12 or more times a year. However, it does indicate that there may be considerable untapped demand.

Table 5.11 What is the potential audience?

Potential attendance per year	%
0	2
1	0
2	2
3-5	8
6-10	4
12+	83

6. British Sign Language interpretation of films

Key findings

- *There are very few feature-length films available with in-vision BSL interpretation. Broadcasters appear not to make recordings of the BSL interpreted films that they offer to their audiences as these are broadcast with live signing.*

- *Around 50,000 people in the UK rely on BSL as their primary means of communication although as many as 370,000 people are able to sign*

- *During our qualitative research, on the whole, the idea of BSL interpreted films at the cinema was not well-received even among fluent users.*

- *During our qualitative research, in general, most people preferred 'in-vision' interpreted films rather than live*

- *There is a small group of people, numbering perhaps 30,000 who might benefit from regular BSL interpreted cinema screenings, in particular children and BSL users for whom English is a second language*

Issues

BSL interpretation of films is something which very few people have experience of. The best approach to finding out more about this market, production processes and costs (see appendix 22 for an indicative costing for a BSL interpreted feature film) would be to produce and pilot a signed version of two or three popular films and then attempt to distribute and market them both for theatrical exhibition and on DVD and then gauge audience reaction. This would have to be done in collaboration with an organisation with a track record of reaching the target audience or through a specialist agency. It should also be done in partnership with the TV broadcasters in order to maximise distribution possibilities and avoid duplication of effort.

In the short term, if an adequate level of interest can be demonstrated through a pilot project a reasonable ambition would be the release of a number of key titles each year for theatrical exhibition (probably in a 'bespoke marketed' setting rather than in general programmes) and on DVD as part of a full access package. This should focus on films aimed at children and young people as these age groups are more likely to have BSL as their first language.

6.1 Size and characteristics of the potential market

Estimates vary for the size of the Sign Community. The BDA and the RNID both quote a figure of 50,000 people who rely on sign as their principal means of communication while the top figure is 370,000 if you include all those who use sign language at least some of the time which includes hearing family members and people learning to sign.

Research undertaken for Sky Television[21] revealed that they had just 59 customers who had indicated a need for signed programming and take-up of their signed films on pay per view was consistently low. However, their market share as a pay service is probably too low to draw meaningful conclusions. A second piece of research conducted by MORI for OFCOM in relation to demand for access services on television[22] as a whole came to a somewhat higher figure:

'Usage of signing services is far lower than subtitling, both among the UK population as a whole and its target user group. Around 1.1 million (ranges from 900,000 to 1.3 million) people claim to have used the service at least once; of these approximately 66,000 (ranges from 36,000 to 130,000) are hearing impaired and are proficient in BSL 2. Low take-up of signing services appears to be driven by potential users' lack of proficiency in sign language, as well as broad preference for subtitles over signing. Of those who claim to have used signing on TV, only a small number have the ability to understand sign language and therefore to understand the signer output (for instance, the audience measurement suggests that the number of people in the UK who have a good knowledge of BSL – understand BSL and use it to communicate - numbers only 154,000 and ranges from 258,000 to 85,000).'

6.2 Demand for the service in relation to film

[21] All about access to Television through signing – research carried out by Deafworks for BSKYB, May 2006

[22] Provision of Access Services, Research Study Conducted for OFCOM, March 2006

The implications for cinema of the low level take-up of signed services on Sky television and the findings of the MORI research are that demand for signed films at the cinema and DVD is likely to be even lower than this.

During the course of this research we invited people visiting yourlocalcinema.com and people in the Sign Community to give their opinion on the idea of signed cinema. The responses from around 100 people were almost all overwhelmingly negative, with comments such as it would be 'ugly' or 'too distracting' and that subtitles on their own were quite adequate. This coincides with the findings of the Sky and MORI research too.

Even among our focus groups attended primarily by first language BSL users, there was surprisingly little appetite for it, although the sample was atypical in that most of them were bilingual in BSL and English and therefore able to follow subtitles easily.

That said, there are at least two groups who might be interested in signed films both at the cinema and/or on a format for home consumption i.e. DVD.

a) Children whose levels of literacy in English is not yet high enough to follow subtitles but who have a good command of BSL.

b) Adults whose first language is BSL for whom English is very much a second language. Within this group there will be some who are monolingual in BSL for whom subtitled screenings are completely inaccessible.

There is clearly some appetite for signed cinema screenings (see appendix 20 for a list of current supply) as demonstrated by the work of Talking with Hands. However, reaching and building its audience requires specialist promotion and marketing and it is very unlikely that the cinema industry would have the capacity to build an audience either for signed cinema screenings or BSL interpreted DVDs without considerable investment in communications with grass roots organisations and Deaf clubs.

6.3 Our research and methodology

On November 4th 2006 we held a one day programme of film screenings at De Lane Lea studios in London with an audience of BSL users and their friends and families to experiment with various styles of BSL interpretation and different genres of films both with and without interpretation and/or subtitles. We offered two different programmes, one aimed at children and young people and one aimed at adults. After watching a series of clips (see appendix 6 for the full programmes) the audience was invited to give their views in a focus group discussion. A total of three focus groups were facilitated. We were particularly interested in comparing live with 'in vision' signing as well as signing compared to subtitling.

Note on recruitment to the BSL interpreted screenings and focus groups

With the BSL interpreted screenings, information about the research and invitations to participate were widely circulated via D/deaf led organisations, existing Deafworks contacts as well as on yourlocalcinema.com.

It should be noted that this issue of cinema interpreting has rarely been previously discussed within the Deaf Community, therefore the focus groups attracted atypical membership. Also few people have seen live interpretation of a cinema film in a cinema auditorium and still fewer an in-vision signed film. Those who participated were:

- Mostly Deaf activists, bi-lingual in English and BSL (who therefore mostly favoured subtitles for their own viewing).

- Articulate, well-educated D/deaf children, of whom the older ones (8 years plus) mostly therefore preferred subtitling.

A different range of views would be obtained from: grassroots Deaf BSL users; younger and/or less well-educated D/deaf children. Therefore there is a need for canvassing their views in the future but this would require a very different research format.

6.4 Findings on BSL users from the quantitative research

The survey we conducted included a number of questions relating to use of BSL. In the sample BSL users accounted for 24% (167 people).

22% of BSL users say they use signing to help them understand films, but none of them ONLY use signing (presumably due to the lack in supply of films). Most (69%) only use subtitles.

BSL users are slightly more likely to

- prefer watching films at the cinema (36% BSL users - 29% non-BLS user)
- or have no preference (17% BSL user - 8% non BLS user).

Conversely they are less likely to watch film on TV / DVD/ video (47% BSL user – 62% non-BSL user).

BSL users are less aware that many films are now released with subtitles (only 58% of BSL users were aware as opposed to 72% of non-BSL users). BSL users were also less aware than non-BSL users that many cinemas now have the equipment to screen subtitled films (58% compared to 75% of non-BSL).

BSL users are more likely than non-BSL users to have increase their film attendance since subtitled films have been available (35% BSL users to 19% non-BSL users). This confirms their reliance on subtitles alone to understand films. A higher proportion of BSL users (55%) feel they watch subtitled films at the cinema as often as they would like, compared to non-BSL (27%).

BSL users are significantly more likely to watch films at both mainstream and independent cinemas than non-BSL (52% to 30%) or to watch ONLY at independent compared to non-BSL (20% to 12%).

Table 6.4 Communication used by BSLs user to help understand film

BSL users are more likely to have booked their tickets at the box office in person than non BSL users (75% to 53%) suggesting BSL use is not a barrier to booking.
For additional information on BSL interpretation of film see appendix 20.

Means of interpretation	%age
Signing ONLY	0%
Subtitles ONLY	69%
Signing and subtitles	13%
Signing, subtitles and induction loop[23]	7%
Signing, subtitles and lip-reading	1%
Subtitles and lip-reading	8%
Subtitles and induction loop	1%

6.5 Signing vs subtitles

Almost all responses in this research to the idea of signing films have been negative although it should be noted that the samples are unlikely to represent the Deaf Community as a whole (see note on sampling above). Most people have indicated a preference for subtitles, principally because they are accustomed to them and find them adequate for understanding the film. For children there is the added benefit that subtitles enhance their learning of English.

[23] See appendix 23 for a technical note on induction loops

In our research screenings we showed signed films both with and without subtitles. Some people found having to watch three things at once (the action on screen, the signer and the captions) just too much to take in, and this would be especially tiring to do for the length of the average feature film. However, there were others who found a film which is only signed, hard to follow as they use the captions as a back-up to comprehension. There was another smaller group who wanted signing without subtitles because they prefer to focus entirely on the signer and become fully absorbed in that.

On balance, where a film is signed the majority seemed to want subtitles as well.

6.6 Live vs in-vision

The audience for the signed screenings held on November 4th were by no means unanimous in their preferences for in-vision signing but the balance seemed to favour in-vision and this coincides with other audience research (see above).

"I prefer the subtitles. But live interpreting I find it very hard to watch the film and watch the live interpreting at the same time so I have missed the picture."

"I think we should ban live interpreting it's no good. No good. no good."

On an ergonomic note, people found the in-vision signers easier to look at because this involves less movement of the head and eyes. The issue of the size of the signer relative to the screen was also raised:

"imagine if you were in a big cinema, a huge cinema and a huge screen and a little interpreter in the corner how on earth will you watch the film it's almost impossible."

However, the live signer was extremely popular (Ramon Woolfe has a large fan base) and live signing offers a number of other advantages such as sending out a message to deaf audiences, children in particular, that deaf people can have meaningful and properly remunerated work and careers. It is also possible with live signing to cover things outside the main feature such as advertising, trailers, pre and post screening discussions (such as those which took place at the London Film Festival signed screenings in 2006).

Blocking was an issue with in-vision signing as the signer sometimes obscured the action on screen. Other styles of in-vision signing – shrinking the picture and putting the signer in a border or designing the film so that there is space for the signer to appear without blocking overcome this difficulty although are less satisfactory on other counts.

It is unlikely in the short term that in-vision signing could be available for brand new releases due to the preparation time involved and the need to get the final version of the film to the signers in advance, but it should be possible to provide signing for films as little as a week after their main release.

In-vision signing offers the obvious advantage that the film can then be widely distributed and with the advent of digital technology and satellite distribution, there is the potential to do this at low cost. For a single small investment in additional post production costs therefore it would be possible to have a signed film widely available. However, the distribution possibilities are nothing like as wide as they would be for an English language film due to regional and national variations in sign (see below).

6.7 Deaf vs. hearing interpreters

There is a strong preference within the Sign Community for Deaf interpreters. This seems to be mainly because deaf people are usually more fluent in Sign as they use it more frequently for everyday communication. However, there is also a strong feeling that hearing signers should only pick up the work which a deaf person cannot do for practical reasons. However, most people recognise that there are poor Deaf interpreters and good hearing interpreters and are prepared to accept hearing interpreters if they can provide a high quality interpretation.

6.8 Regional dialects/overseas territories

"I found it a little bit difficult to pick up some signs on 'Hard Sell' as it has some regional signs. I am from Northern Ireland so I found it quite hard so I had to look at the subtitles."

Like English, BSL has regional variations. These are more akin to regional dialects than accents and it can be difficult for a signer from London to understand someone from, for example, Newcastle. There does not appear to be a universal form of BSL readily understood by all and there would be strong resistance to the idea of developing a single 'official' version of BSL:

'It's the same with hearing people. Why can't they all speak one dialect for the whole of England? They would not like it, they would feel they have lost their identity, it's the same with Sign Language."

Most countries have their own Sign Language. ASL (American Sign Language) is quite different to BSL and so in terms of distributing films with in-vision signing, a BSL version would not be saleable across all English speaking territories or even across the whole of the UK.

Further research into BSL

During the research it proved extremely difficult to track down any films recorded with BSL interpretation. We found out about two such films, only one of which could we locate. Whilst broadcasters including the BBC and Sky both screen BSL interpreted films, we were told that these go out live and that no recordings are made of these screenings. There may be an opportunity here to get these films recorded and to build a library of BSL interpreted films.

BSL interpretation of films is something which very few people have experience of. Despite our best efforts, this research project did not poll those most likely to benefit as they are very hard to reach and did not come forward. Since the market is tiny (perhaps 30,000) and the costs high, any further work in this area needs really to be addressed by public policy and funding interventions, rather than the industry.

One approach to finding out more about this market and production processes would be to produce and pilot a signed version of two or three popular films and then attempt to distribute and test market them - both for theatrical exhibition and on DVD to gauge audience reaction.

In the short term, if an adequate level of interest can be demonstrated through a pilot project, a reasonable ambition for public funding would be the release of a number of key titles each year for theatrical exhibition (probably in a 'bespoke marketed' setting rather than in general programmes) and on DVD as part of a full access package. This should focus on films aimed at children and young people as these age groups are more likely to have English as a second language.

With regard to BSL interpreted films, other questions which need to be considered are: -

- What would be the attitude of rights holders generally to the creation of signed versions of their films?

- What percentage of BSL users would buy BSL interpreted DVDs?

- What percentage of BSL users are not fluent in English and what are their characteristics e.g. their leisure consumption patterns; their geographical distribution; and what are their actual and possible viewing patterns?

- Is there a solution to the regional dialect issue? The BBC's approach to national signed broadcasts could be of assistance.