

# Investigating COVID-19 impacts on independent cinemas, local film viewing habits, and demographics for the Westdale

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The Westdale Theatre

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By

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# Executive Summary

The Westdale Theatre, a not-for-profit charitable community organization in Hamilton, reopened in 2019 as a premier cinema and cultural event space. However, it faced challenges with declining attendance rates, particularly during the COVID-19 pandemic. To address this issue, The Westdale Theatre sought the assistance of the McMaster Research Shop to investigate changes in film-viewing habits, audience awareness, and preferences. The report presents findings from a mixed-method investigation, including a literature review, a survey of local residents, and key informant interviews with other Canadian independent cinema owners.

Literature review and interview findings reveal a significant shift towards digital streaming, reducing cinema attendance and impacting independent cinemas. Audience preferences are evolving, with a rising preference for streaming services. To combat these changes, Canadian independent cinemas are leveraging a cinematic experience that is unique from in-home viewing by involving the community through interactive events and thoughtful programming.

Survey results indicate a bifurcated local residential market consisting of roughly half younger short-term residents and post-secondary students, and older long-term residents. Unsurprisingly, surveyed residents are watching movies, but mostly at home. Those attending live performances are older and have lived in the area longer. Many residents were aware of The Westdale Theatre, but few were regular patrons, and a third—mostly students—had never attended to see a film. Most were unaware of The Westdale Theatre's mission and not-for-profit status but showed intentions of visiting the theatre after reading the mission statement. Though residents were generally interested in The Westdale Theatre's special programming, less than half were well-aware of the diversity of offerings.

Our recommendations for The Westdale Theatre are as follows:

1. Diversify the business model by focusing on live performances and space rentals to increase revenue streams.
2. Enhance the cinema experience by offering unique and interactive events such as special screenings, Drunken Cinema, and Film Talks.
3. Conduct targeted marketing, particularly to students and older, longer-term residents to expand the patronage base.
4. Fine-tune film programming by experimenting with more comedy films, catering to diverse demographics, and collecting data to identify trends.
5. Raise awareness of the Westdale's mission and not-for-profit status through effective marketing strategies to attract patrons who align with its mission.

6. By implementing these recommendations, The Westdale Theatre can better adapt to changing audience preferences and enhance its community engagement, ensuring a sustainable future as a vibrant cultural hub in Hamilton.

# Key Terms

For the purpose of this research report, the research team defined key terms that will be used and their intended meaning.

Independent cinema: An independently owned theatre that plays second run films in an indoor setting. The size of the theatre is smaller than that of a larger organization with less than 1000 seats and has no more than two screens.

Not-for-profit charitable organization: Organizations that provide services for the community, giving all money earned back into running the organization. Not-for-profits gain revenue through donations, grants, and memberships. Donors get a tax receipt for making contributions to not-for-profit charitable organizations.

Cinema representative: The person speaking on behalf of operations at the independent cinema for the purpose of an interview (e.g., owner, manager, executive director).

Local resident: Pertains to those who live within an approximate two-kilometer radius from The Westdale Theatre. The postal codes used to determine this location include L8S, L8P, and L8R.

# Introduction

## Overview

The Westdale Theatre, reopened in 2019 as a not-for-profit charitable community organization, markets itself as Hamilton’s “premier cinema and cultural event space.” Its business model includes screening second run (i.e., after mainstream cinemas) and arthouse films (approximately 80% of its operations) and hosting community events or live performances (approximately 20% of its operations). The Westdale Theatre approached the McMaster Research Shop after experiencing a reduction in attendance rates over the past few years, including during the COVID-19 pandemic. The theatre struggled to stay connected to the community during this time and relied on a government wage-subsidy program and grants to stay afloat. Theatre attendance seemingly has not returned to pre-pandemic ways of living since COVID-19 restrictions have been lifted. As such, the Westdale Theatre is concerned about the sustainability of its business model. The organization would like to re-engage with local residents to investigate changes in their film-viewing and cinema-going habits, their awareness of the theatre and its offerings, and what programming and marketing efforts might gain their previous patronage back and help them expand to new and diverse markets. The Westdale Theatre would also like to gauge the public’s knowledge of their status as a not-for-profit charity. This report presents findings from an investigation to answer these questions.

## Scope

We developed the following research questions for this project:

1. How, if at all, have people’s film viewing habits changed within the last few years (including the pandemic)?
2. How have independent cinemas responded to these shifts in viewing habits?
3. What are the demographics of the Westdale Theatre’s local audience?
4. To what extent are local residents aware of the Westdale Theatre’s presence and its offerings?
  - a. To what extent are they interested in its offerings?
  - b. What alternative offerings, if any, are desired?
  - c. Do they know the Westdale Theatre is a registered not-for-profit charity and to what extent is this appealing to its potential audience?

To answer these research questions, we used mixed methods including a literature review, a survey of local residents, and key informant interviews with independent cinema owners. The remainder of this report outlines the methods, findings, key takeaways and recommendations and is intended to help The Westdale and other independent cinemas better understand the market for independent cinema and evaluate their business strategy.

# Methods

## Literature Review

We conducted a brief and selective review of peer-reviewed and grey literature to help answer the first two research questions: 1) “How, if at all, have people’s film viewing habits changed within the last few years (including the pandemic)?”, and 2) “How have independent cinemas responded to these shifts in viewing habits?”. See Appendix A for our inclusion and exclusion criteria.

A major limitation to our review is that little was published about independent cinemas during COVID-19 compared to research available for major theatre chains. Similarly, little research discussed changes in people’s viewing habits during COVID-19. Our key informant interviews and surveys (discussed below) helped to fill these gaps, however.

## Key Informant Interviews

We conducted key informant interviews with other Canadian independent cinema owners to compliment the literature review, with a focus on understanding how other cinemas have responded to changes caused by the COVID-19 pandemic. See Appendix B for our inclusion and exclusion criteria and interview guide. Out of the 16 individuals we contacted for an interview, we conducted 5 interviews representing 7 independent cinemas (as some of the cinemas had overlapping ownership). We conducted and transcribed the interviews online using Zoom and thematically analyzed the resulting qualitative data.

The main limitation to the key informant interviews was that there was a small number of participants, likely due to the limited time for recruitment. Cinemas may have also not have wanted to participate because they didn’t have the time, didn’t see the value in participating, or believed themselves to be in competition with The Westdale Theatre and therefore did not want to share business strategies and plans. Lastly, with different research team members conducting the interviews, this could have led to differential emphasis on the questions and therefore differences in the quality of responses.

## Surveys

We used a survey (see Appendix C) to determine The Westdale’s demographics, as well as collect data for research question four (awareness and satisfaction with offerings). We defined local as those living within the L8S, L8P, and L8R postal code regions, or an approximate 2 km radius around The Westdale Theatre (see Appendix C). The research team distributed the survey using two methods:

1. In-person distribution: The McMaster Research Shop team created a pamphlet with a QR code to the online survey (See Appendix C). Members of the Research Shop team handed out the survey pamphlets door-to-door in mailboxes and handed some to people that were in their driveway or at their door within the postal code region. We distributed 800 surveys to people’s homes.

2. Online distribution: A member of the McMaster Research Shop team emailed departments at McMaster University by reaching out to administrative assistants to send an email with the survey link and pamphlet image to students. The QR code pamphlet image was also shared on a few McMaster University social media groups on Facebook. Finally, The Westdale Theatre posted the QR code pamphlet on Facebook and sent it out in their newsletter.

In total, the survey was open for responses from February 15 to March 22, 2023 and we received a total of 248 responses from local residents. We used descriptive statistics to summarize the resulting survey responses in Microsoft Excel. A third research team member conducted a thematic analysis of the survey's short answer questions. The team member created a codebook and grid in Google Sheets to categorize participant written responses into different themes for each short answer question.

While we are happy with the response rate of the survey, it's important to note not everyone may have had an equal opportunity to participate. Though we covered most homes within the targeted geography, it's possible we missed some. Also, current patrons of The Westdale Theatre may have been more likely to notice online ads for the survey, as they're more likely to follow the organization's social media accounts. Lastly, some participants may have opted out of the survey because they didn't know how to access the survey using a QR code. The latter may be especially true for older adults.

## Findings

### 1. Film viewing habit changes since the start of the pandemic

#### A surge in digital streaming

Our literature and key informant interviews confirm what is by now common knowledge: COVID-19 drastically impacted the movie industry through cinema closures and production shutdowns, which in turn correlated with a surge in demand for digital streaming services. For instance, by the end of 2021, streaming services gained an estimated total of 385 million subscribers (Carey et al., 2022). A recent study suggests that, today, 96% of millennials subscribe to at least one video streaming service, with the average person holding 3.5 subscriptions. In a study comparing viewing habits over time (Statista, 2023), researchers found that 36% of adults preferred watching a movie for the first time using a streaming service in 2020, compared to only 15% in 2018, indicating a rising preference for streaming.

Independent cinema owners further commented on the shift to streaming. One cinema estimated a 30% reduction in audience members from pre-pandemic numbers. Other cinema owners have witnessed decreases in annual memberships. Cinema owners attributed this increase to a general shifting preference for accessible streaming



services, especially among older demographics, and that the pandemic “accelerated the streaming problem.” Two cinema owners discussed seeing increases to their audiences, especially among students and young adults, but not to pre-pandemic levels. Consequently, cinema owners have made staffing cuts and no longer use past statistics to project future income.

Future projections are hazy

Future projections for the film industry are modestly optimistic: 2022 revenues increased 65% from 2021, though this is still lower than pre-pandemic levels (Frater, 2023). Gower Street Analytics forecasts that the North American film market will experience a 12% increase in revenue from 2022 to reach \$8.6 billion in 2023 (Frater, 2022), though it is unclear what the market share will look like for mainstream vs. independent cinemas. Moreover, blockbuster film releases and exclusive theatre screenings have played a large role in revenue increases (Lang & Rubin, 2021), which may be unattainable strategies for small-scale cinemas limited to second-run films.

It's uncertain the extent to which viewers will prefer streaming movies rather than going to the cinema. Many streaming services are expected to implement price increases, which could influence user subscriptions. Netflix's new basic ad-supported tier, which requires users to view ads in order to access previous affordable subscription pricing (Levy, 2022), as well as restrictions on password-sharing are other changes that could possibly lower user subscriptions and correspondingly increase cinema patronage. Some cinema owners are not so optimistic, commenting on the entrenchment of streaming habits: “you have access to everything at home on a big screen in your pajamas and you can make your own popcorn for 50 cents.”

## 2. Independent cinema response to changing viewing habits

In this section, we review strategies independent cinemas are using to attract and retain audiences in a shifting market, combining insights from both our literature review and key informant interviews.

Event cinema

Cinema representatives universally agreed that they had success with “event cinema,” such as live music, film talks, drunken cinema, audience participant screenings, and sing along films. As one representative explained, “you can't replicate the experience of having a single long screening or something with a full audience singing along to the film.” One cinema representative discussed how event cinema profits can help compensate for less profitable movies.

### Promoting the cinema (social) experience

In a study interviewing managers and patrons of independent cinemas (Clark, 2022), the opportunity to have a shared movie-watching experience with others remains a significant attraction. Indeed, in three out of our five interviews, cinema owners discussed that the “cinema experience” is a much richer experience than what someone can get at home.

Part of the cinema experience is that it functions as a *social gathering space*. One cinema was successful pre-pandemic through having a “nice” lobby serving snacks and alcoholic beverages, encouraging audience members to come out early. Post-pandemic, they remarked that people are showing up later and more last minute to films, attributing this to people becoming disaccustomed to “mingling” during the pandemic. Another cinema owner highlighted that independent cinemas should leverage personal relationships between staff and patrons, perhaps in messaging that “people behind the counter recognize you.”

### Diversification

Diversifying income sources may be necessary in an economy where mainstream cinemas and streaming services capture a large market share for film viewing. Fundraising and leasing of spaces for private events have also been proven to be beneficial for independent cinemas by increasing revenue and improving awareness of the space (Hornaday, 2021). One cinema representative discussed in interview that they plan to focus more on space rentals after experiencing success during the pandemic. Examples of space rentals include private film screenings for community groups, but also to university groups or for conferences when they need a space to show something on screen.

### Thoughtful film programming

Two cinema representatives discussed the importance of understanding your audience and catering film programming to their tastes. This sometimes means that if there isn't something new that they want to play, a cinema will end up playing something older to meet the taste of their audience. One cinema representative mentioned that Oscar winning films are what do well for them rather than blockbuster movies.

One independent cinema representative mentioned that the advantage they have over multiplex cinemas is more freedom with curating their programming. They said, “we have one screen, and we can make sure that it's exactly what our audience wants to see.” Similarly, another cinema representative suggested that a benefit that they have over the multiplex cinemas is their flexible business model, which allows them to be more responsive to audience preferences. For example, one cinema observed that their

audience has become “less willing to sit through maybe challenging films” that are “emotionally difficult” or politically driven, and that they are “more into watching happy and uplifting films.”

#### Going digital

Independent theatres have also recognized the importance of digital spaces and social media, which they have used to cultivate more patrons (Gajewski, 2022). Cinema owners discussed in interview how online marketing and web schedules are more cost-efficient and enable greater flexibility in scheduling (compared to paper schedules). A major challenge in this shift, however, is facilitating online engagement among their older audiences.

#### Supporting local

One study, which interviewed managers and patrons of independent cinemas (Clark, 2022), outlines how the opportunity to support a local business continues to serve as a significant attraction for patrons. One cinema representative mentioned they get a lot of strength from their membership, which constitutes people who care about their mission and the quality of films they’re showing.

### 3. The Westdale Theatre’s local demographics

In this section we present local demographic insights from our survey research.

The Westdale Theatre’s local audience is younger and (slightly) more diverse

While The Westdale Theatre’s customers tend to be older overall, those in the age range of 18-24 constitute approximately a third of local survey respondents, compared to only 13% of non-local respondents (see Graph Set 1). This is not surprising given the high number of students filling out the survey (51% of local respondents compared to only 22% of non-local respondents). A high number of student respondents also may account for local demographics being more diverse than non-local demographics – over 25% of local respondents were non-white compared to less than 8% of non-local respondents. The highest category of non-white local respondents was Asian and Pacific Islander (11.8% of sample).



**Graph Set 1: local resident age, ethnicity, and student status differs from non-local residents.**

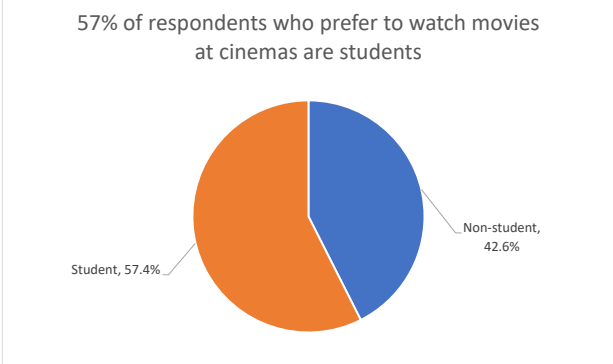
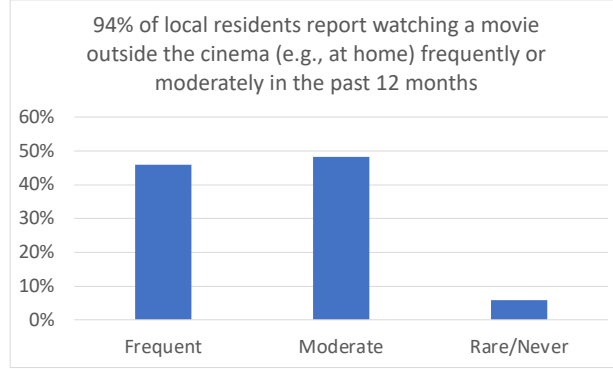
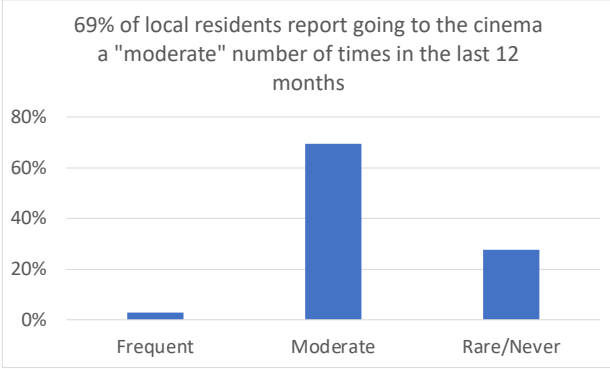
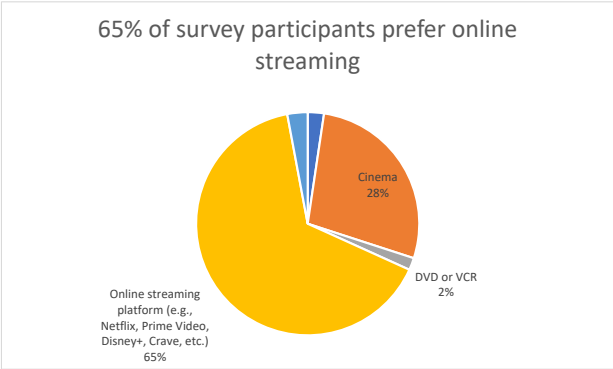
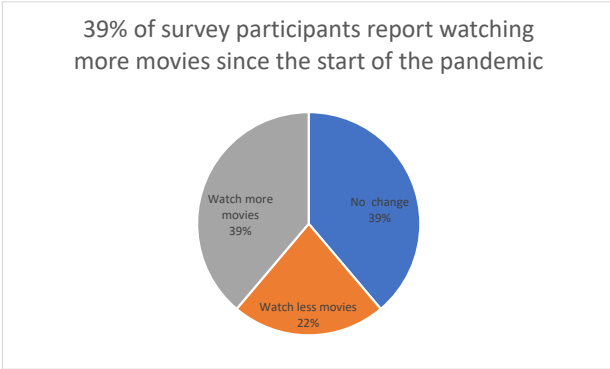
Locals roughly divided between short- and long-term residents

Just under half of The Westdale’s local demographics have lived there for less than four years, whereas nearly 40% have lived in the area for over 11 years. This is not surprising given the large number of students who filled out the survey.

Locals are watching more movies, but at home

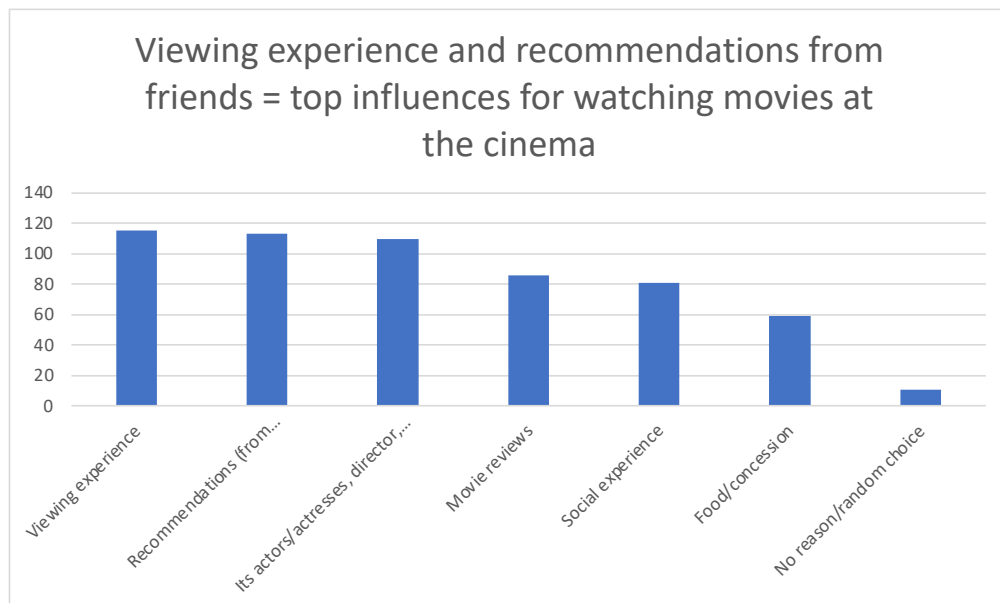
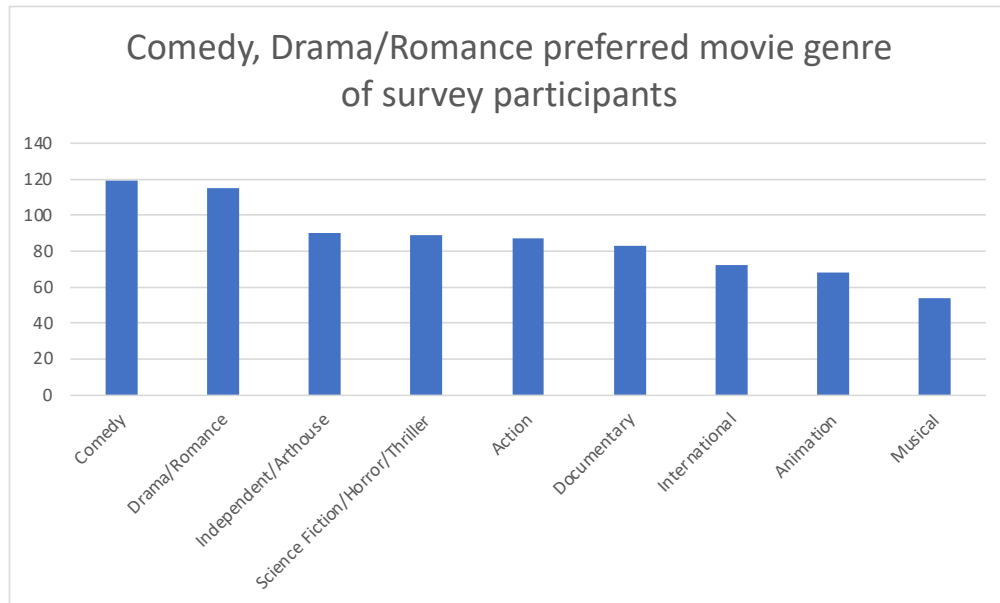
As seen in Graph Set 2, a good number of local residents reported watching more movies since the start of the pandemic, but 65% of these respondents report preferring to view their movies via online streaming platforms like Netflix. Of the small percentage (28%) preferring to watch movies at the cinema, over half were students.

Only a very small percentage reported “frequently” (i.e., once a week or several times a week) going to the cinema, whereas approximately 45% of respondents reported frequently watching movies online. About two-thirds of respondents report going to the cinema once a month or less, and almost a quarter report rarely or never going to the movies.



**Graph Set 2: Many respondents report preferring to (and actually) viewing movies at home since the start of the pandemic. Slightly more students prefer watching movies at the cinema compared to non-students.**

Most who go to the movies are looking to laugh and enjoy the “viewing experience”  
 As seen in Graph Set 3, local residents appear to prefer the “comedy” genre followed by drama/romance and independent/arthouse over the other genres. In terms of what influences local residents to experience a film at the cinema (as opposed to at home), the viewing experience, followed by information about the film (e.g., recommendations, director/cast) rank highest.

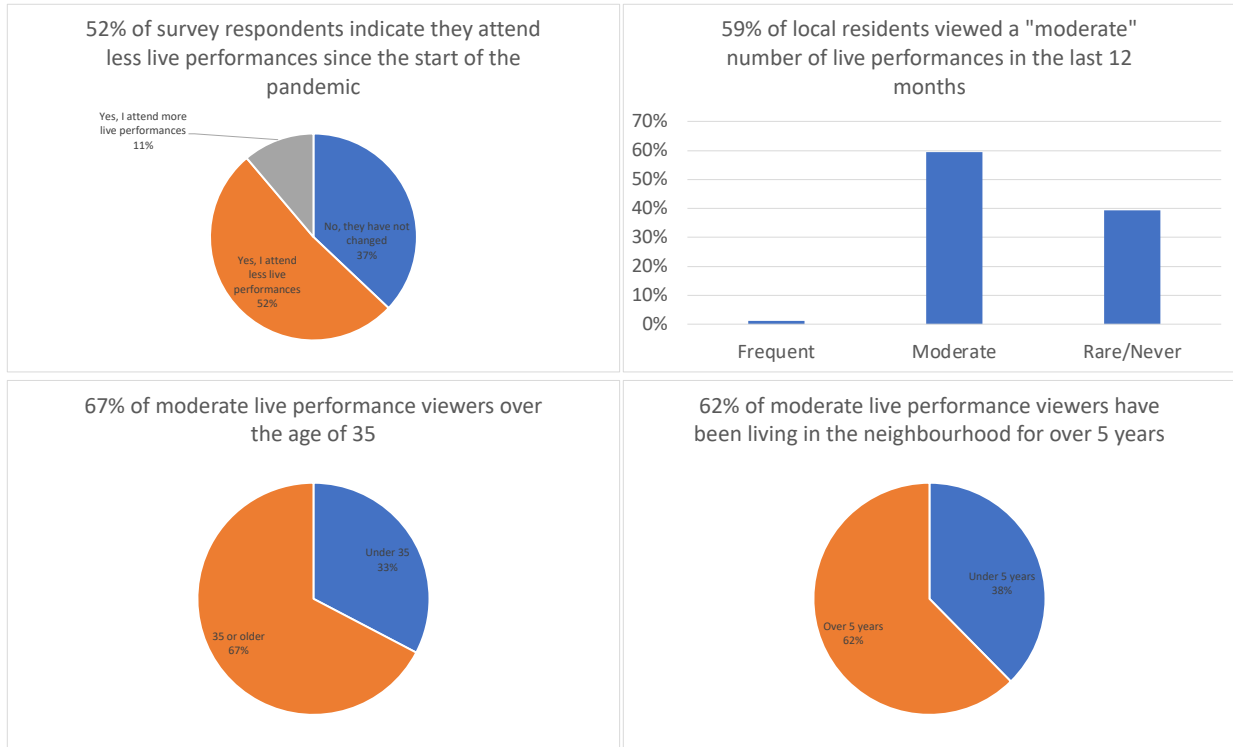


**Graph Set 3: Comedy and Drama/Romance most preferred genres. Most respondents go to the cinema for the viewing experience.**

Live performance viewings down - those that go are usually older and have lived in the area longer

Unsurprisingly, most local residents (92%) seem to prefer watching live-performances in-person at a venue rather than online. As such, it's not surprising that the majority reported attending less live performances since the start of the pandemic (see Graph Set 4). Of those who reported going to a "moderate" number of live performances in the

past 12 months, two-thirds are over the age of 35, and just under two-thirds have been living in the neighbourhood for over 5 years.

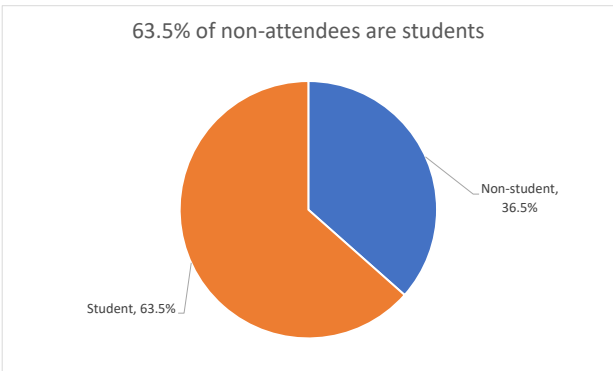
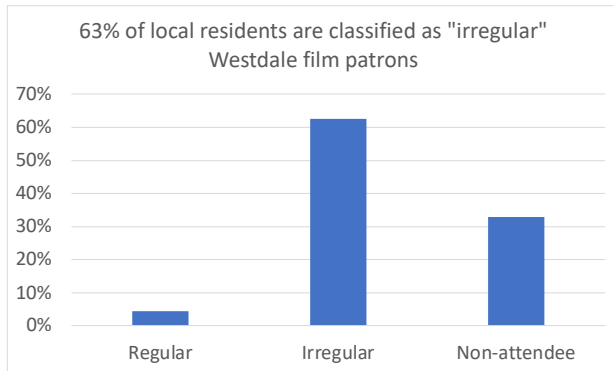


**Graph Set 4: Local residents have been going to less live performances, but those that do tend to be older and more established in the neighbourhood.**

#### 4. Local residents' awareness and patronage of The Westdale Theatre

Most local residents are aware of the Westdale, but few are regular patrons

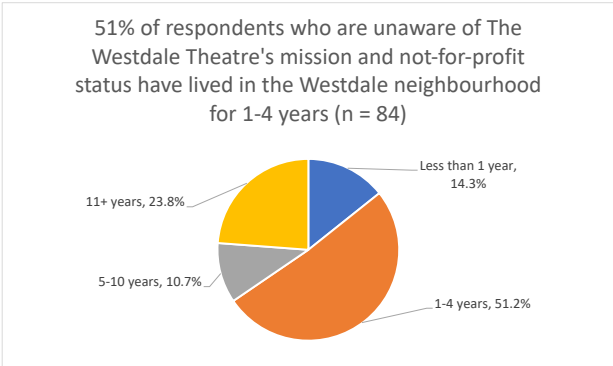
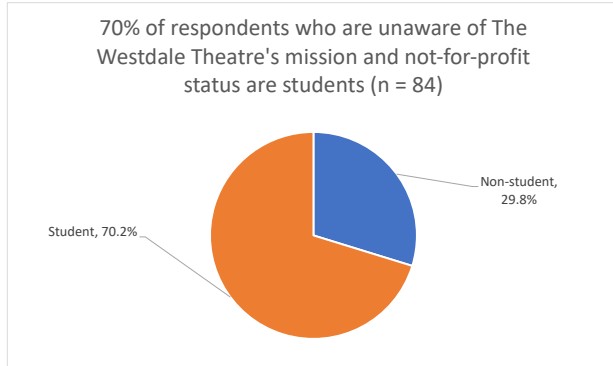
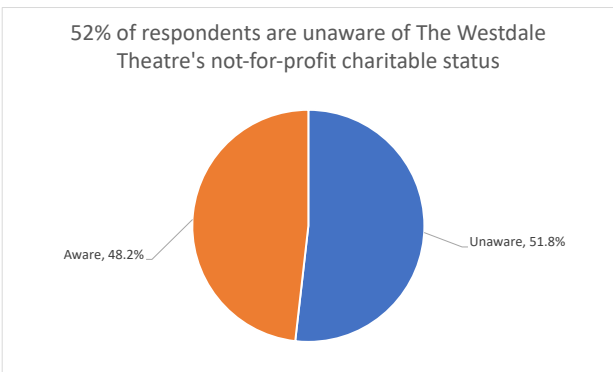
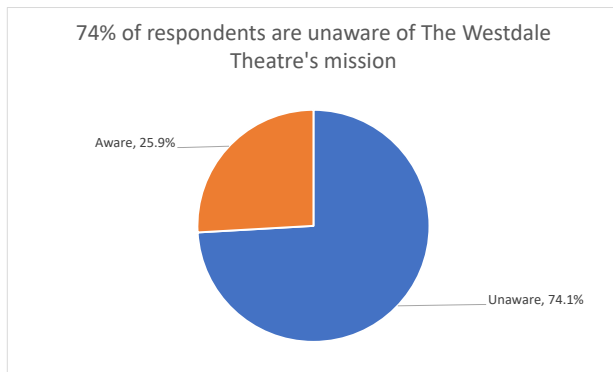
96% of local residents indicated they've heard of the Westdale theatre before, yet less than 5% are regular patrons and nearly a third have never attended to see a film (Graph Set 5). Of those who've never attended the Westdale, nearly two-thirds are students, highlighting a potential untapped market.



**Graph Set 5: Most local residents have heard of the Westdale, but very few are regulars.**

Most local residents unaware of the Westdale’s not-for-profit status and mission

As seen in Graph Set 6, though just under half were aware of the Westdale’s not-for-profits status, nearly 75% of local residents were unaware of its mission. Of those who are unaware of *both* the Westdale’s not-for-profit status and mission, approximately 70% were students and just over 50% have been living in the neighbourhood for 1-4 years, meaning students and new residents (who likely overlap) are targets for raising awareness.

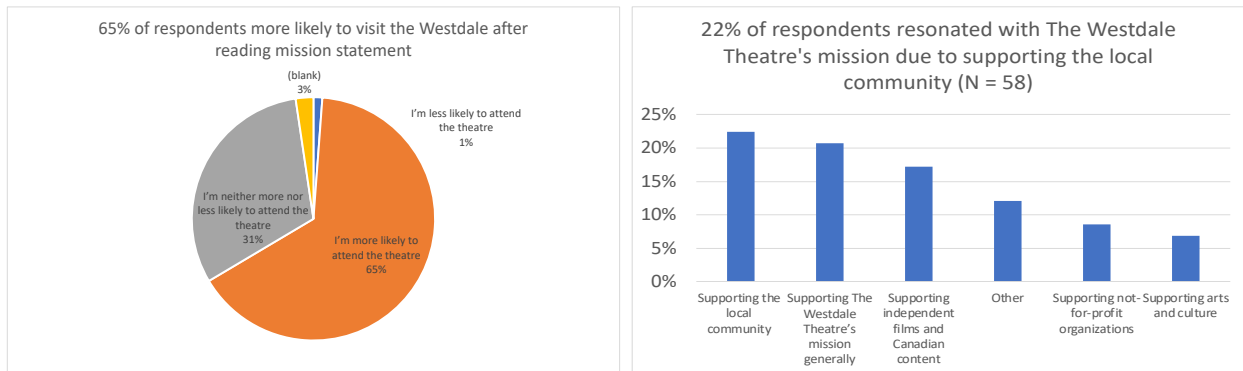


**Graph Set 6: Students and new residents largely ignorant of the Westdale’s not-for-profit status and mission.**



## Awareness of mission and not-for-profit status linked to intentions to visit the Westdale

As seen in Graph Set 7, 65% of residents stated they're more likely to visit the Westdale after reading its mission statement. The top three reasons provided by respondents include wanting to support the local community, supporting The Westdale Theatre's mission generally, and supporting independent films and Canadian content.



**Graph Set 7: Respondents resonate with the Westdale's mission and are more likely to visit after reading its mission statement.**

### Film selection and social experience tied to patronage

Nearly half of respondents highlighted film selection and programming as their reason for attending The Westdale, and 81% of that half had favourable comments about the film selection. For instance, they mentioned attending for Oscar-nominated films, themed Christmas or Halloween films, family films, film classics, and independent films. The specific film that was mentioned the most that has drawn people to attend The Westdale Theatre is The Rocky Horror Picture Show.

The remaining 10 (19%) respondents indicated that they have not attended The Westdale Theatre because of their film selection. For instance, they would prefer to attend a cinema that screens popular new releases and blockbusters that are typically shown at multiplex cinemas. Alternatively, they have never heard of the films that The Westdale Theatre screens.

### COVID-19 not a major concern

Interestingly, of those who commented on their reasons for not attending The Westdale Theatre, only 7% listed the health risks of COVID-19 as their reason. More people (10%) listed timing/being busy with work or children as their reason for not attending screenings.

## 5. Local residents' awareness and satisfaction with The Westdale Theatre's offerings

Residents are generally satisfied with offerings; some room for improvement

As seen in Graph Set 8, approximately 80% of local residents indicated they're satisfied or very satisfied with the Westdale's offerings. Residents were most satisfied with film offerings, followed by live performance and community event offerings, partially attributed to a higher proportion of respondents who felt neutral or unsure of these offerings.



**Graph Set 8: Respondents generally satisfied with the Westdale's offerings, especially their film programming.**

### Some demand for a wider variety of films

Critical feedback on offerings was divergent. In a previous question we identified divergent perspectives on film selection: while most had good things to say about current selections (which seem to favour critically acclaimed films, independent films, and classic films), a smaller pocket of respondents would prefer more popular new releases and blockbusters. Beyond these trends, when asked what would encourage them to visit the Westdale more, a handful of respondents requested a wider diversity of films, including:

- More international and culturally diverse films,
- More queer and BIPOC films,
- Themed film programming (e.g., movie marathons, films within a series or by a certain director, holiday themed screenings),
- Annual collections (e.g., independent animation collections).

When it comes to live performances, 19% of respondents who provided critical feedback on the Westdale’s programming commented, suggesting the Westdale host more concerts and musical events at their venue. This includes having live piano to accompany silent films.

The only feedback on community events were received were suggestions for more events catered to post-secondary students.

Local residents have mixed general awareness of Westdale special offerings

As seen in Graph Set 9, local residents are most aware of the Westdale’s live performances, special screenings, and space rentals, while least aware of community events, Hamilton Originals, and Drunken Cinema. 46% of residents were aware of four or more of these offerings, while the remainder (more than half) were only aware of 1 to 3 or none at all.

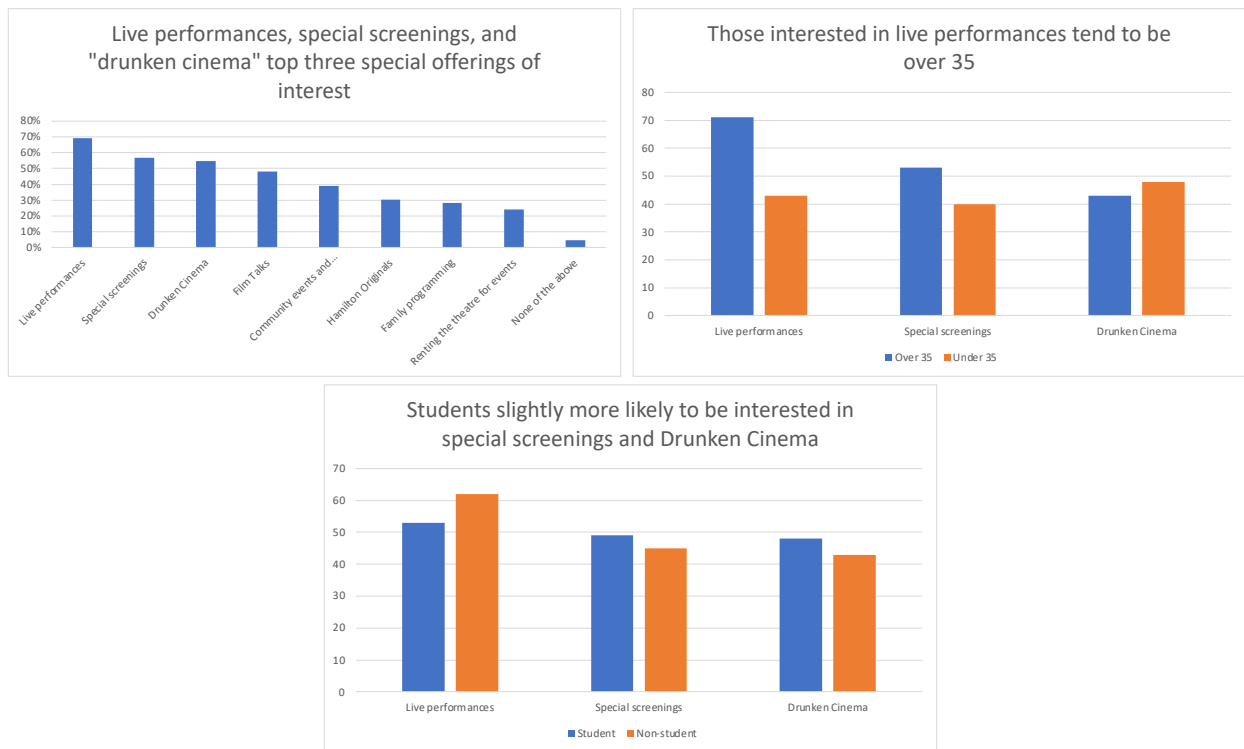


**Graph Set 9: Mixed general awareness of special offerings among local residents.**

Significant demand for live performances, special screenings, and Drunken Cinema

As seen in Graph Set 10, just under 70% of local residents indicated interest in live performances at the Westdale. Those interested in live performances tend to be over the age of 35. Over 50% of respondents also indicated interest in special screenings

and Drunken Cinema, with Film Talks not far behind. A slightly higher number of students were interested in special screenings and Drunken Cinema than non-students.



**Graph Set 10: General interest in special offerings among local residents.**

## Discussion and Recommendations

Our findings underscore a widescale shift to digital streaming, reduced cinema attendance, and the entrenchment of at-home film viewing habits. Though pessimistic towards a full-scale recovery of the cinema industry, our findings also highlight strategic options for small-scale independent cinemas like the Westdale to stay afloat. Below, we've crafted five data-grounded recommendations for the Westdale. We are not professional marketers nor have industry knowledge or expertise, and as such all our recommendations are tentative and meant only to inspire strategic discussions among the Westdale's leadership.

### Recommendation 1: Continue to diversify

Findings from our literature review suggest streaming is not going away anytime soon, and independent cinemas must compete for remaining audiences with mainstream theatres. To remain viable, we recommend the Westdale continue to diversify its

business model. Other independent cinemas have been successful with private space rentals (e.g., private film screenings) and other fundraising events to help boost operating capital. The Westdale's leadership should consider allocating more of its focus to live performances and space rentals (e.g., 60/20/20). Ideally, programming is curated to stay in line with the organization's mission, though deviations can be justified as cost recovery measures to sustain its community-based and cultural programming. Findings from the survey suggest there's particular interest in live performances, with 70% of participants indicating interest in this offering.

## Recommendation 2: Curate a unique and optimal cinema experience

The Westdale Theatre should focus on creating a cinematic experience that is richer than what can be experienced at home. Survey respondents highlighted the "viewing experience" as their top reason for going to the cinema. Our key informants discussed finding ways to make theatre-going much more unique and interactive than watching a film at home, such as Sing-alongs, Drunken Cinema, Film Talks, and live music. The Westdale Theatre currently takes part in some of the event cinema options mentioned above, though survey respondents seem to be most interested in special screenings (e.g., Rocky Horror Picture Show), Drunken Cinema, and Film Talks. If the Westdale has previously found these events to be profitable, our data supports hosting more of these events. Lastly, less than 40% of survey respondents were aware of Drunken Cinema, meaning the Westdale should consider boosting advertising for this popular offering.

## Recommendation 3: Conduct targeted marketing

Independent cinema owners highlighted that social media marketing is an effective way of keeping the audience up to date on programming and schedules and potentially attracting new audiences, though other forms of marketing (e.g., posters, hard copies of schedules) are likely still viable. The Westdale should consider using whatever marketing tools are at their disposal to garner new patrons. In particular, students seem to be an underutilized market, constituting almost two-thirds of those who have never been to the Westdale despite making up over half of local residents.

Local resident demographics seem to be roughly divided between younger students and short-term residents vs. older and longer-term residents. At a high level, the Westdale's marketing strategy should attend to both these audiences. Preferences are diverse among these two groups and therefore it's difficult to make more specific recommendations, however we did notice higher interest in live performances among

those over the age of 35. As such, live performance events and advertising should appeal to and target these demographics, and physical/hard copy advertisements (e.g., flyers) may be most effective if distributed to parts of the neighbourhood where older and more established residents live.

#### Recommendation 4: Fine-tune film programming

Overall, local residents seem to have diverse film preferences, making it difficult to recommend the right “mix” of programming. Comedy, however, seems to be the most popular genre – a finding echoed by one of our key informant – meaning the Westdale could experiment with allocating more screen time to these films and evaluating sales. Our survey findings also suggest local demographics are *slightly* more diverse than non-local audiences, presenting an opportunity to expand viewership by showcasing more films catered to, for example, the BIPOC community. The Westdale should consider conducting outreach with diverse social and ethnic community groups to co-develop and implement special programming.

Lastly, the Westdale, if it isn't already doing so, should collect and record ticket sales data for each screening alongside other relevant “metadata” such as the day and time, genre, and other relevant film information. In the long term, this “big” dataset can be analyzed to more objectively elucidate trends such as preferred genres and the times of the year (and day) certain films tend to do better.

#### Recommendation 5: Raise greater awareness of Westdale's mission and non-for-profit status

65% of respondents stated they are more likely to visit the Westdale after reading its mission statement, though roughly 75% of respondents were previously unaware of it (and over half its not-for-profit status). This disparity suggests the Westdale could boost patronage by better advertising its mission and not-for-profit status, though people's intentions are often different than their behaviour. Still, the Westdale should consider evaluating the effectiveness of marketing initiatives that incorporate information about the Westdale's mission vs. those that do not and further find ways to appeal to those who align with its mission.

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# Appendices

## Appendix A: Literature Review Inclusion and Exclusion Criteria

### Part 1

<b>Criterion</b>	<b>Inclusion</b>	<b>Exclusion</b>
Population of interest	Adults/students aged 18+	Non-adults/aged under 18
Study design or format	Systematic review, longitudinal study, cross-sectional study, film journal publication, grey literature	Opinion pieces
Publication date	Published in 2018 or after	Published before 2018
Language	Published in English	Not published in English, or not published in translated English
Geographic area	Published in North America	Published outside of North America

### Part 2

<b>Criterion</b>	<b>Inclusion</b>	<b>Exclusion</b>
Population of interest	Cinema owners	Non-cinema owners
Study design or format	Case studies, film journal publication, grey literature	Opinion pieces
Publication date	Published in 2013 or after	Published before 2013
Language	Published in English	Not published in English, or not published in translated English

Geographic area	Published in North America	Published outside of North America
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**Literature Review Search Keywords**

“Canadian/Canada”, “North America/American”, “cinema”, “film”, “film industry”, “Covid-19”, “movie theatre”, “film viewing”, “media consumption”, “viewing habits”, “movie watching”, “movie watchers”, “pattern”, “trend”, “cinemagoers”, “moviegoers”, “streaming platforms” “streaming services” “effects of Covid-19”, “coronavirus”, “pandemic”, “survival”, “independent cinema”, “arthouse cinema”, “2022”.

## Appendix B: Interview Research Instruments

### Interview Participant Inclusion/Exclusion Criteria

Inclusion	Exclusion
Plays second-run films	Plays ONLY new release films
1-2 screen theatre	Multi-screen theatre (>2)
Indoor theatre	Drive-in only
Independently owned (for-profit/ not-for-profit)	Owned by large corporations (for-profit)
Located in Canada	Located outside of Canada
Less than 1000 seats in cinema	More than 1000 seats in cinema

### Interview Recruitment Email

Good morning,

My name is [name]. I am reaching out to you today as a Research Associate with the McMaster University Research Shop. The Research Shop is a volunteer-based program that conducts research in partnership with local organizations. Our team is conducting research in collaboration with The Westdale Theatre located in Hamilton, Ontario. The purpose of this research is to better understand how people's film viewing habits have changed during the pandemic and how independent cinemas have responded to such changes.

If you're willing, we'd love to chat with you about your cinema, how you've been impacted by the pandemic over the past 3 years, and your future plans for the cinema. Participation is completely voluntary, and we will send you a copy of the results when we're finished.

If interested, we would like to organize a time within the next month that works for you for a phone or Zoom interview. The interview will take approximately 30 minutes to complete.

Please respond to this email if you are interested in an interview and we will connect with you to schedule a time. Please let us know if you have any questions or concerns.

Thank you for your time and consideration.

Best,

## **Interview Guide**

### **Interview Script**

Hello, my name is [introductions]. We want to thank you for agreeing to participate in this interview. We're volunteers with the McMaster Research Shop who are working on a research project with The Westdale Theatre in Hamilton, Ontario. The purpose of this research is to gain perspective from small independent cinemas on how, if at all, people's film viewing habits have changed during the pandemic, and how independent cinemas have responded to such changes. We'll be asking about your business model, the opportunities and challenges with running a small independent cinema, and finally how COVID has changed or impacted your business. The information we gather today will be used for providing insight into the sustainability of The Westdale Theatre's service model and inform small independent cinemas on ways to re-engage with their audience moving forward.

Do you have any questions about the project?

*Confidentiality-* Before we begin our discussion, I want to spend a few moments going over some basic ground rules for today:

- Your participation is voluntary. You can leave or stop participating in this interview at any moment you choose with no repercussions on yourself.
- You do not have to answer any questions that make you feel uncomfortable.
- The information which we collect from these interviews will unlikely be attributable (connected or associated) to you. If we decide we want to use a quote and attribute it to you, we would contact you ahead of time to see if that was alright.
- I will strive to protect the confidentiality of our discussion or your written responses. Keep in mind that we can be identified through the stories we tell when deciding what to tell me.

*Use of tape recorder-* with your permission, this interview will be recorded to increase accuracy and to reduce the chance of misinterpreting what you say.

- All audio files and transcripts will be securely stored in a Google Drive folder that only the Research Team of this project has access to.
- We will also be taking notes throughout the discussion.
- Only the Research Team will have access to transcripts from this discussion.
- The tapes and transcripts will only be used for this project and will be destroyed once the report is complete.

We ask that when using abbreviations or acronyms, you say the full name at least once to aid transcription.

If at any point you feel tired or fatigued, please let us know and we can take a short break. We will also ask periodically if you would like to take a short break.

Do you have any questions before we begin?

Do you give your consent to participate in this interview?

## **Interview Questions**

### ***Background information***

1. Could you please tell me about the history of [name of cinema]?
  - a. How long has [name of cinema] been open?
  - b. How would you describe its business model?
2. What is your role and responsibilities in [name of cinema]?
  - a. How long have you been in this role?

### ***Changes caused by pandemic and response to changes***

1. How was business before the pandemic?
  - a. What were some of the biggest challenges and successes with running the cinema?
2. How, if at all, has the COVID pandemic impacted your business?
  - a. Prompt: Impact on sales/patronage? Did former regular members stop coming?
  - b. Prompt: Changes in audiences? Did you notice any change in patron demographics (e.g., race, ethnicity, proximity to cinema, students etc.)
  - c. Have you accessed any government grants due to the pandemic? Is this something you did prior to the pandemic?
3. Over the past year, since many of the lockdowns have lifted and theatres have been able to consistently remain open, how has business been?

- a. Prompt: Have you witnessed an increase, decrease, or no change in patronage to your cinema?
4. Have you noticed any changes to people's film viewing habits? (E.g., change in taste in movie genres and live performances or online streaming vs. cinema going. If yes, please describe.
  - a. What have you done or plan to do, if anything, in response to these changes in film viewing habits?
  - b. Prompt: Have you, or do you have plans to, change your programming or offerings?
    - i. Have you found any success or challenges with these new approaches?
5. Have you made any other changes to your business model as a result of the pandemic?
  - a. Prompt: Have you changed your marketing and promotions for the cinema? If yes, how so?
6. Within the next 5 years, what do you think will be the major opportunities and challenges for independent cinemas?
  - a. Prompt: Do you have any other business advice for small, independent cinema owners in how to navigate these opportunities and challenges? (e.g., changes to business model, offerings, marketing, etc.)
7. We are at the end of our questions. Is there anything else that you would like to add that we haven't covered? Do you have any questions for us? (e.g., how the data will be used)

### **Closing Remarks and Follow-up**

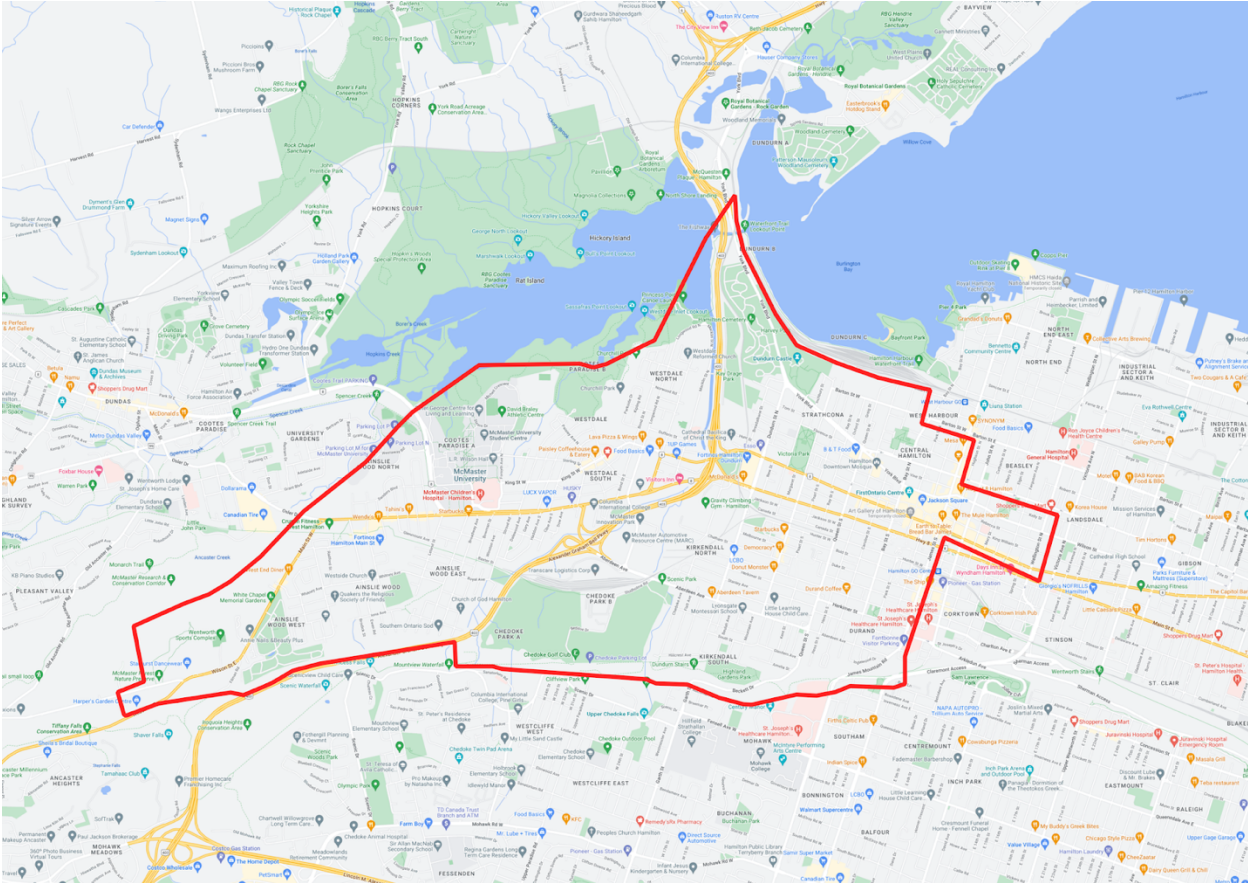
Thank you for taking the time today to meet with us and answer our questions.

Would you be interested in receiving a copy of the interview findings when they are available? (If yes) What is the best method of contacting you to share our results? If you want to follow-up with us, please contact us at [bossea1@mcmaster.ca](mailto:bossea1@mcmaster.ca).

Thank you again for participating, and I hope you have a great rest of your day.

# Appendix C: Survey Research Instruments

## Postal Code Map for survey distribution



Survey Pamphlet

Fill out our survey for a chance to win **1 of 10 movie & popcorn passes** at The Westdale Theatre.

It only takes 10 minutes or less to complete.



Scan the QR code to access it.



Office of  
Community Engagement



### Survey Consent Statement

The Research Shop at McMaster University is conducting research on behalf of The Westdale Theatre. By completing this survey, you will be helping The Westdale Theatre to better serve the community with cinematic, community, and live programming that is of interest to you, and others in your neighbourhood.

Every effort will be made to ensure the confidentiality of any identifying information, and all responses to the survey will be used solely for research purposes.



At the end of the survey, you will have the option to be entered into a draw for a chance to win 1 of 10 pairs of movie and popcorn passes at The Westdale Theatre.

By clicking "Next" you agree that you have read the above information about this study and that your participation is voluntary.

## Survey Questions

### Page 1: Demographic Questions

1. Do you currently live within one of the L8S, L8P, L8R, postal codes? (Includes a photo of the boundary)
  - a. Yes
  - b. No
  - c. Unsure
  
2. How long have you lived in the Westdale neighbourhood or surrounding area?
  - a. Less than 1 year
  - b. 1-4 years
  - c. 5-10 years
  - d. 11+ years
  
3. What is your age?
  - a. Under 18 years old
  - b. 18-24 years old
  - c. 25-34 years old
  - d. 35-64 years old
  - e. 65 years old or over
  - f. Prefer not to answer
  
4. Please specify your ethnicity: (Select all that apply)
  - a. Arab (Saudi Arabian, Palestinian, Iraqi, etc.)
  - b. Black/African/Caribbean
  - c. East or Southeast Asian (e.g., Chinese, Japanese, Korean, Vietnamese, Cambodian, Filipino, etc.)
  - d. Indigenous (Inuit/First Nations/Metis)
  - e. Indigenous outside Canada
  - f. Latin American (Costa Rican, Guatemalan, Brazilian, Colombian, etc.)
  - g. South Asian (East Indian, Sri Lankan, etc.)
  - h. West Asian (Iranian, Afghani etc.)
  - i. White/European
  - j. Prefer not to answer

- k. Other
5. Are you a post-secondary student?
- a. Yes
  - b. No

**Page 2: Questions about current movie/tv/performance viewing habits**

6. How often have you watched a movie **at a cinema** in the last 12 months?
- a. Never
  - b. Once a year or less
  - c. Less than once a month
  - d. Once a month
  - e. Once a week
  - f. Several times a week
7. How often have you watched a movie **outside of a cinema** in the last 12 months?
- a. Never
  - b. Once a year or less
  - c. Less than once a month
  - d. Once a month
  - e. Once a week
  - f. Several times a week
8. How often have you watched a live performance (e.g., concert, live comedy, etc.) in the last 12 months?
- a. Never
  - b. Once a year or less
  - c. Less than once a month
  - d. Once a month
  - e. Once a week
  - f. Several times a week
9. Have your movie watching habits changed since the beginning of the COVID-19 pandemic (March 2020)?
- a. Yes, I watch more movies
  - b. Yes, I watch less movies
  - c. No, they have not changed
10. What is your current preference for watching movies?
- a. Cable/Fibre/Satellite TV
  - b. DVD or VCR

- c. Online streaming platform (e.g., Netflix, Prime Video, Disney+, Crave, etc.)
- d. Cinema
- e. Other (Please specify):

11. Have your in-person live performance watching habits changed since the beginning of the COVID-19 pandemic (March 2020)?

- a. Yes, I attend more live performances
- b. Yes, I attend less live performances
- c. No, they have not changed

12. What is your current preference for watching live performances?

- a. In person at a venue
- b. Live television
- c. Online/Streaming
- d. Other (Please specify):

13. What influences your decision to watch a particular movie at the cinema? (Select all that apply)

- a. Recommendations (from websites, friends, or others)
- b. Its actors/actresses, director, plot, and/or trailer
- c. Movie reviews
- d. Social experience (e.g., watching with/around other people)
- e. Viewing experience (big screen, big sound)
- f. Food/concession (movie theatre popcorn)
- g. No reason/random choice
- h. Other (please specify):

14. What genre of movie do you like to watch? (Select all that apply)

- a. Action
- b. Science Fiction/Horror/Thriller
- c. Comedy
- d. Drama/Romance
- e. Documentary
- f. Musical
- g. Animation
- h. Independent/Arthouse Film
- i. International
- j. Other (please specify):

### **Page 3: Questions about The Westdale Theatre**

15. Have you heard of The Westdale Theatre before taking this survey?

- a. Yes
- b. No

**Page 4: If they answered “yes” to question 15 (Have you heard of The Westdale Theatre)**

16. How did you hear about The Westdale Theatre?
  - a. From a friend/family member
  - b. I saw it in the neighbourhood when passing by
  - c. Online (advertisement/social media)
  - d. Newspaper advertisement
  - e. Other (please specify):
  
17. How many times have you attended The Westdale Theatre in the last 12 months?
  - a. Only once
  - b. 2-5 times
  - c. 6-10 times
  - d. 11-15 times
  - e. 16-20 times
  - f. 21-25 times
  - g. More than 25 times
  - h. I have not attended The Westdale Theatre in the last 12 months
  
18. (Open-ended question) Please elaborate on your response above. For instance, if you have never been to The Westdale Theatre before, why not? If you have been a few times or regularly, what was your motivation? (Optional)
  
19. If you have been to The Westdale Theatre before, what for? (Select all that apply) (Optional)
  - a. Film
  - b. Live performance
  - c. Community event (e.g., fundraiser, festival, etc.)
  - d. Other (please specify):
  
20. To what extent are you interested in the following offerings from The Westdale Theatre? (Rate your degree of interest for each)
  - a. Film
  - b. Live performance
  - c. Community event (e.g., fundraiser, festival, etc.)

**Page 5: Questions about not-for-profit charitable status and mission (if answered “yes” to 18)**

21. Are you aware that The Westdale Theatre is a not-for-profit charitable organization?
- Yes
  - No
  - I don't know what a not-for-profit charitable organization is
22. Are you aware of The Westdale Theatre's mission/mission statement?
- Yes
  - No
23. The Westdale Theatre is a not-for-profit charitable organization with the following mission statement:
- "The Westdale Theatre, as Hamilton's community cinema and arts venue, will primarily screen independent and repertory films, providing an intimate, heritage-designated space for cultural performances and exhibitions, showcasing Canadian content."
- How, if at all, does hearing this information impact your likelihood of attending a movie, live performance, or other event at The Westdale Theatre?
- I'm more likely to attend the theatre
  - I'm less likely to attend the theatre
  - I'm neither more nor less likely to attend the theatre
24. (Optional) Please elaborate on your response.

## **Page 6: Questions about The Westdale Theatre's offerings**

25. Which of the following Westdale Theatre special event offerings have you heard of? (Select all that apply)
- Film Talks
  - Hamilton Originals
  - Drunken Cinema
  - Special screenings
  - Live performances
  - Family programming
  - Community events and fundraisers
  - Renting the theatre for events
  - None of the above
26. Which of the following Westdale Theatre special event offerings interest you? (Select all that apply)

- a. Film Talks (cinema classics and talk with movie enthusiasts after)
- b. Hamilton Originals (conversations with local musicians)
- c. Drunken Cinema (classic films with drink specials)
- d. Special screenings (with writers/directors/filmmakers Q&A)
- e. Live performances (e.g., concert, comedy, etc.)
- f. Family programming
- g. Community events and fundraisers
- h. Renting the theatre for events
- i. None of the above

27. How satisfied do you feel with The Westdale Theatre's programming offerings?

- a. Very satisfied
- b. Satisfied
- c. Neutral
- d. Unsatisfied
- e. Very unsatisfied
- f. Not aware of The Westdale Theatre's offerings

28. (Open-ended/optional): What, if anything, could The Westdale Theatre do to encourage you to attend more often? For instance, any specific types of movies, events, or live performances, etc. (Optional)

**Page 7: If they answer "No" to question 18 (Have you heard of The Westdale Theatre).**

29. The Westdale Theatre is located downtown Westdale and is a fully licensed and accessible theatre. Cinema offerings include a mix of independent films, documentaries, classic movies, and second-run (i.e., after major theatre) films. They also offer live performances, like musicians and comedic acts, and other special events. Based on this description, how interested are you in attending The Westdale Theatre?

- a. Very interested
- b. Interested
- c. Unsure/neutral
- d. Not very interested
- e. Not interested at all

30. (Optional) Please elaborate on your response.

31. To what extent are you interested in the following offerings from The Westdale Theatre? (Rate your degree of interest for each)

- a. Film
- b. Live performance
- c. Community event (e.g., fundraiser, festival, etc.)

32. Which of the following Westdale Theatre special event offerings would be of interest to you? (Select all that apply)

- a. Film Talks (cinema classics and talk with movie enthusiasts after)
- b. Hamilton Originals (conversations with local musicians)
- c. Drunken Cinema (classic films with drink specials)
- d. Special screenings (with writers/directors/filmmakers Q&A)
- e. Live performances (e.g., concert, comedy, etc.)
- f. Family programming
- g. Community events and fundraisers
- h. Renting the theatre for events
- i. None of the above

33. The Westdale Theatre is a not-for-profit charitable organization with the following mission statement:

“The Westdale Theatre, as Hamilton’s community cinema and arts venue, will primarily screen independent and repertory films, providing an intimate, heritage-designated space for cultural performances and exhibitions, showcasing Canadian content.”

How, if at all, does hearing this information impact your likelihood of attending a movie, live performance, or other event at the Westdale Theatre?

- a. I’m more likely to attend the theatre
- b. I’m less likely to attend the theatre
- c. I’m neither more nor less likely to attend the theatre

34. (Optional) Please elaborate on your response.

35. (Open-ended/optional): What, if anything, could The Westdale Theatre do to encourage you to attend? For instance, any specific types of movies, events, or live performances, etc.

36. Now that you have completed the survey, how likely are you to attend The Westdale Theatre? (Optional)

- a. Very likely
- b. Likely
- c. Unsure/Neutral
- d. Unlikely
- e. Highly unlikely

**Page 8: Draw entry**

If you would like to be entered into the draw for a chance to win 1 of 10 pairs of movie and popcorn passes at The Westdale Theatre, please fill in the information below. This information will not be associated with your survey responses and will remain confidential.

Name:

Phone number:

Email address:

Thank you for taking the time to complete our survey.