

film and video exhibition and distribution in London

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The Distribution & Exhibition of Film & Video in London

A Report to the GLC

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PREFACE

Earlier this year I prepared a report for the GLC on 'The Audio and Audio-Visual Media Industries in London' (Economic Policy Group Strategy Document no. 7, June 1983).

This estimated that – taken together – the film, cinema, TV, video and radio industries in London currently employ around 50,000 people and generate a turnover in excess of £1 billion at current prices.

This report has been prepared as a more detailed look at one part of this vast 'software' industry, namely the distribution and exhibition branches of film and video.

The reason for this focus is that the various systems of distribution/delivery of audio-visual output are economically and culturally *pivotal*. Control over their structures and policies is the main determinant in deciding which producers are to be linked with which audiences and by what means, and in deciding who reaps the benefits or pays the costs in each case.

Although broadcast television is now the central means for the circulation of audio-visual production, this report has been commissioned on the assumption that the shared public viewing of audio-visual material is an important facet of democratic cultural life. Hence the emphasis in what follows on the structure and changing political economy of cinema distribution and exhibition.

The report has been put together over the last 2 months, in time for it to be available as a contribution to the GLC's conference on Cultural Policy to be held at the Riverside Studios in mid December.

Simon Blanchard

November 1983.

SECTION

1

A The present structure of commercial film distribution & exhibition

The recent Report of the Monopolies and Mergers Commission (MMC) on 'the supply of films for Exhibition in Cinemas' (1) provides a useful review of the current structure.

There are 35 companies actively engaged in film distribution. The 6 largest, who receive over 90% of all film rentals are:

Columbia-EMI-Warner

United International Pictures (formerly CIC and United Artists)

UK Film Distributors (formerly 20th Century Fox and Disney)

ITC Film Distributors

Brent Walker Distributors

Rank Film Distributors

Out of the total film rentals paid by exhibitors in 1981 (just over £41 million), the major share went to:

	<i>% of total film rentals (1981)</i>
Col-EMI-War	39.2
UIP	27.2

This confirms the analysis made by the 5th Report of the Interim Action Committee on the Film Industry, who noted that '... the distribu-

tion industry in this country is dominated by consortia of mainly American owned distributors.' (2) The percentages show that US majors control not less than two thirds of film rental receipts in Gt Britain. (If UK Film Distributors were added – although the MMC gave no details of their share – this figure would probably rise to around 75%).

As the MMC put it, 'the outstanding feature' of the exhibition structure is that 'it is effectively dominated by 2 companies', namely EMI Cinemas (part of Thorn-EMI), and Rank Leisure (part of the Rank Organisation). There are in addition a number of 'mini-majors' owning smaller chains. The MMC reports the shape of this sector as follows:

	<i>% of total GB rentals paid</i>
EMI 119 sites / 308 screens	32.3 (1981)
Rank 89 sites / 225 screens	24.7 (1981)
Cannon Classic	8.0 (1980)
Star Group 49 sites / 126 screens	6.3 (1980)

(The balance of the rentals paid is accounted for by the many independent cinemas and minor circuits).

The control of distribution and exhibition by the majors is cemented by the system of 'alignment' of distributors with the main circuits. The MMC provide the following details for the main suppliers to EMI and Rank:

<i>1. EMI</i>	<i>% of rentals paid by EMI cinemas in 1980 to</i>
CIC	38.2
UA	2.7
CEW	30.7
Other distributors	28.4

<i>2. Rank</i>	<i>% of rentals paid by Rank cinemas in 1981 to</i>
Rank FD	11.3
CEW	21.1
CIC	5.4
UA	27.8
Other distributors	34.4

The interlocking oligopoly of distribution and exhibition that this structure represents ensures that the overwhelming bulk of the films seen in cinemas open to the public are supplied by the US majors, or by other distributors handling English language films in a 'Hollywood' idiom.



B The decline in commercial cinema exhibition

As the accompanying tables illustrate, cinema exhibition has undergone a process of almost unbroken decline from its post-war peak. Annual admissions have now dropped to just over 60 million for 1982 (3) – around 3.5% of the 1946 figure (just over 1.6 billion).

Table 1. Number of cinemas in GB

Year	Number	Year	Number
1946	4,709	1966	1,847
1948	4,694	1968	1,631
1950	4,660	1970	1,529
1952	4,609	1972	1,450
1954	4,509	1974	1,535
1956	4,349	1976	1,525
1958	3,864	1978	1,519
1960	3,034	1979	1,564
1962	2,421	1980	1,562
1964	2,057	1981	1,514
		1982	1,432

Source: Dept of Trade

Table 2. Cinemas in GB – Number of persons employed

Year	Full-time	Part-time	Total
1950	51,719	34,000	85,719
1964	21,459	19,415	40,944
1966	17,135	17,631	34,766
1968	13,864	16,510	30,374
1970	12,005	16,084	28,089
1972	10,543	12,866	23,409
1974	8,232	12,027	20,259
1976	7,183	11,260	18,443
1978	7,086	10,244	17,330
1980	6,420	10,054	16,474
1981	5,884	8,827	14,711
1982	5,324	7,568	12,892

Source: Dept of Trade

This extended downward trend in the number of cinemas, the numbers employed in them, size of box-office takings etc., has now reached the stage in which the process of steady but stately decline which has been the sector's fate since the early 1960s looks set to accelerate into more or less complete collapse.

There now exists a distinct possibility that one or more of the main circuits could decide to cease operations altogether, or at least very drastically reduce its activities down to a core

Table 3. Cinemas in GB – Gross Box Office Takings (£ million)

1946	118	1966	59.4
1948	109	1968	57.7
1950	105.1	1970	59.0
1952	109.8	1972	59.4
1954	109.9	1974	69.3
1956	104.2	1976	75.8
1958	83.3	1978	118.2
1960	63.6	1979	126.8
1962	56.8	1980	135.7
1964	57.5	1981	135.8
		1982	106.8

Source: Dept of Trade

Table 4. Weekly average admissions to cinemas in Gt. Britain

Year	Millions	Year	Millions
1973	2.74	1978	2.45
1974	2.76	1979	2.15
1975	2.38	1980	1.92
1976	2.05	1981	1.69
1977	2.07	1982	1.26

Source: Dept of Trade

Table 5. Household expenditure on entertainments in GB 1953-54 to 1980

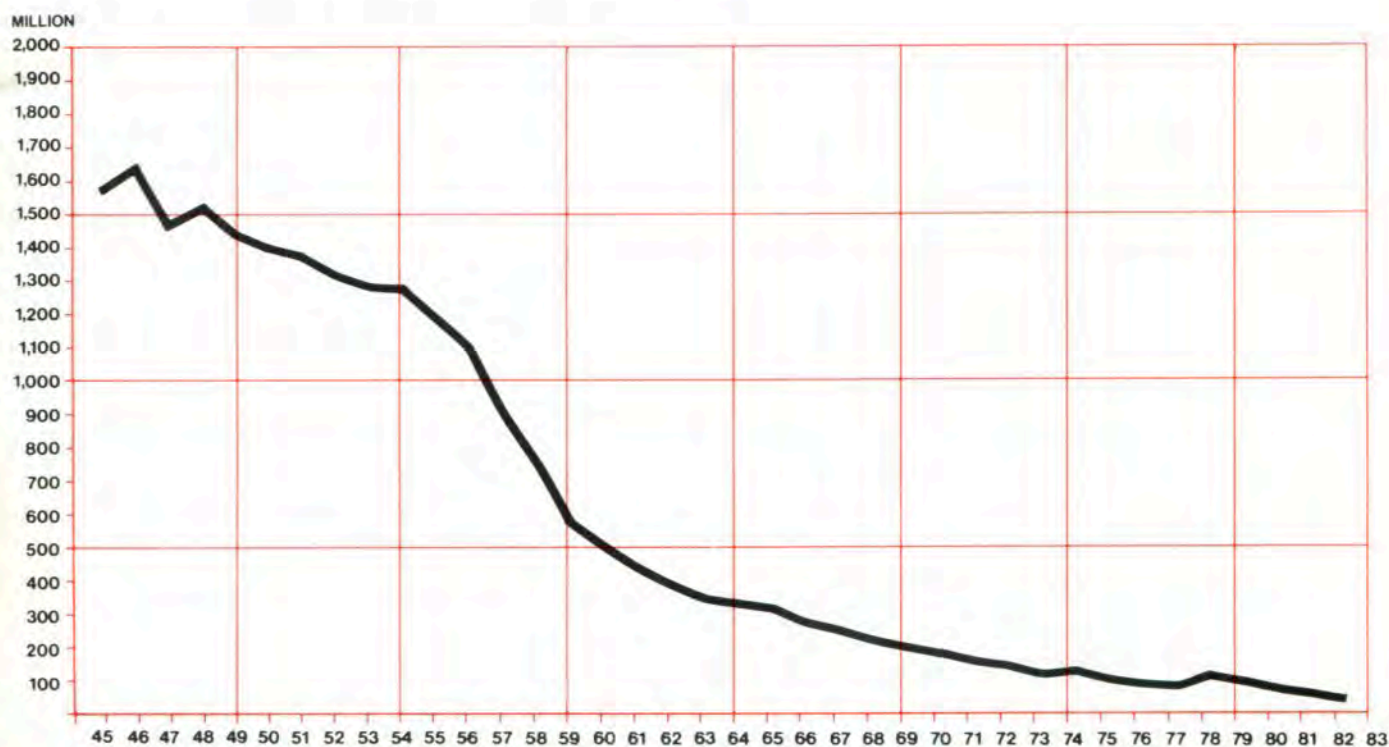
	%			
	1953-54	1965	1975	1980
Cinema admissions	0.99	0.32	0.13	0.11
TV licences & rental; radios, TV sets & musical instruments	1.13	1.90	2.77	2.40
Theatre, sport & other ents.	0.89	0.61	0.68	0.84

Source: Family Expenditure Survey

of prime city centre sites. According to the MMC, Rank – for example – had closed 31 sites with 42 screens between October 81 and December 82. Rank provided the MMC with accounts to show the financial performance of all the individual cinemas in its circuit.

These showed that, to the year ended 31 October 82, the proportion of its cinemas which were in loss before head office overheads were taken into account was just over 26%. (As the MMC point out in passing, the conglomerate's film business is now in any case a very small part of its activities – providing 5.5% of trading profits in 1976).

Cinema attendances in Great Britain: 1945-82





C The main causes of this decline

1. Broadcast TV.

The rise to prominence of TV, both as a 'domestic capital good' and as the central object of 'leisure' time is a key aspect of post-war British politics. In the present context, its significance has been twofold:

a. It demonstrates the main paradox underlying the cinema's decline – namely its co-existence with the undiminished popularity of films as a category of audio-visual production. The British Film & TV Producers Association have calculated that in 1981 BBC and ITV broadcast a total of 951 films. (4)

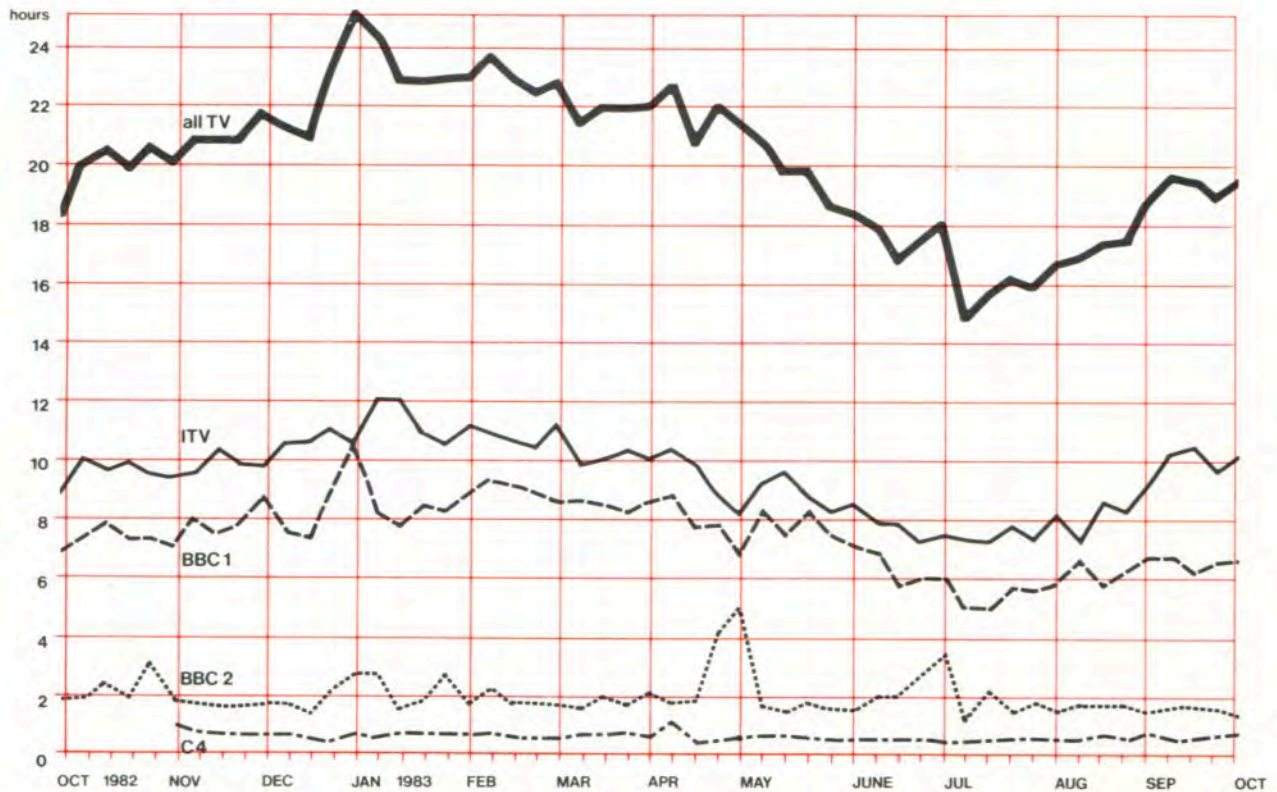
b. TV's capacity to attract the attention of the population for around 20 hours per week on the average is not only in large part the result of broadcasting films, but is also the clearest possible illustration of the pivotal role that distribution occupies in the circulation of audio-visual material. Whilst it may be a polemical simplification to say, as the Interim Action Committee have done, that '... Broadcasting is only a method of distribution', this is undoubtedly its most important characteristic. (5) Moreover, with TVs present in over 98% of all house-holds, broadcasting offers scale

Table 6. TV Licences issued

	<i>Mono-chrome</i>	<i>Colour</i>	<i>Total</i>
1947	14,560		
1948	45,564		
1949	126,567		
1950	343,822		
1951	763,941		
1952	1,449,260		
1954	3,248,892		
1956	5,739,593		
1958	8,090,003		
1960	10,469,753		
1962	11,833,712		
1964	12,885,331		
1966	13,567,090		
1968	15,068,079	20,428	15,088,507
1970	15,609,131	273,397	15,882,528
1972	15,023,691	1,634,760	16,658,451
1974	11,766,424	5,558,146	17,324,570
1976	9,148,732	8,639,252	17,787,984
1978	7,099,726	11,049,192	18,148,918
1980	5,383,125	12,901,740	18,248,865
1982	4,293,668	14,260,552	18,554,220

Source: BBC

Barb weekly average viewing per head

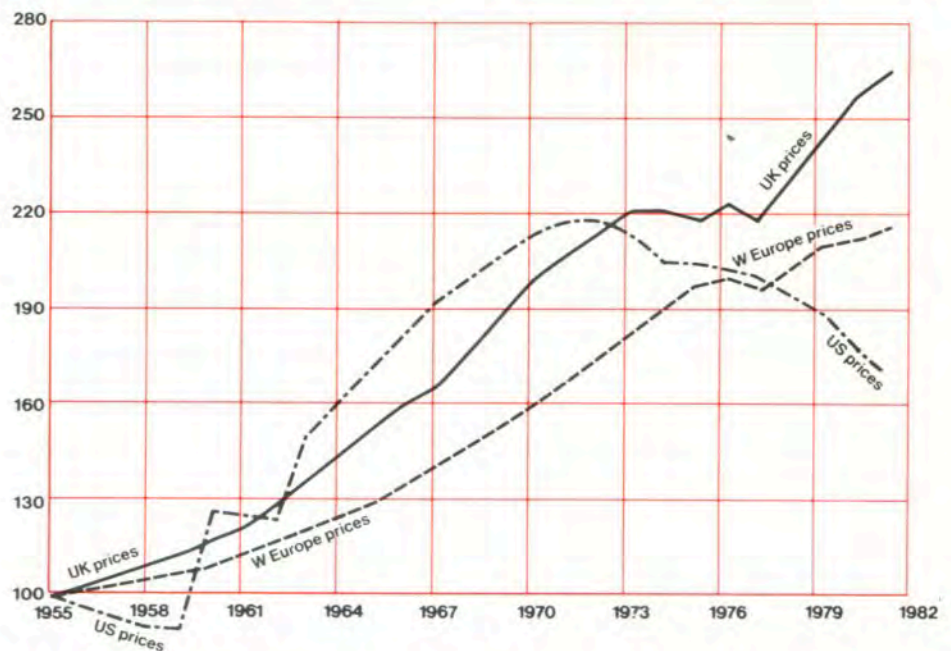


economies that cinemas cannot hope to match. It has been estimated that the cost to the average viewer of receiving BBC or ITV broadcasts is about 2 pence per hour. This is much the same as the costs of the set. (6) (In contrast, cinemas have not responded to this price competition by holding ticket prices steady or reducing them: since 1955, the real price of admissions in Gt Britain has risen over 2.5 times).

2. Changes in the composition of the audience.

Cinemagoing is no longer the largely unsegmented 'mass' activity it had become in the 1940s. The cinema's audience is now distinctly skewed in favour of the young, the better-off, and the male sex. Although different surveys produce some variation in

Indices of real prices of cinema admissions, relative to the representative retail price indices in Great Britain, the United States and Western Europe (West Germany, Holland, France, Italy and Belgium)



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results, the following breakdown shows the main pattern(7):

- a. The 15-34 age range accounts for 74% of the cinema audience. (It forms 34% of the population).
- b. So-called ABC1s form 48% of the cinema audience, C2DEs form 52%. (They form 39% and 61% of the population respectively).
- c. The average cinema audience is 53% men, 47% women. (The population is 52% women, 48% men).

It remains arguable to what extent distributors and exhibitors have been, on balance, the active promoters of these changes in the cinema audience. One arena in which their active role seems reasonably clear is bingo-clubs.

The passage of the 1960 Betting & Gaming Act provided the impetus for bingo-playing by stipulating that members of clubs could gamble. Since then, many cinema owners have taken the decision to convert their premises to this frequently more profitable line of

business. The Gaming Act 1968 was subsequently passed to ensure closer control over what one commentator had called '... the greatest gambling boom outside the State of Nevada' – a boom in which bingo was only a part. The Gaming Board, set up under the terms of the '68 Act, sets the licensing framework within which bingo clubs operate, and monitors trends in the sector. (8)

At the end of 1982 there were 1,451 bingo clubs operating in Britain. For the year ending 31 August 1982, the total amount staked on bingo in these clubs was £469 million. (By comparison, the gross box office takings at cinemas in 1982 was £107 million.)

Both Rank and EMI now own a substantial number of bingo clubs. 5 major operators control some 25% of the clubs, and probably receive a rather larger proportion of the total revenues:

Club ownership of the 5 main operators (1980)

Mecca	123
Rank	69
EMI	103
Ladbroke	71
Granada	35

Source: Dixey & Talbot, 1982

The Gaming Board estimate that average daily attendances at the clubs in 1982 was 358,550 (equal to a weekly attendance of 2,509, 850).

In their recent survey, Rachel Dixey and Margaret Talbot have shown how the bingo-club audience is skewed in approximately the opposite pattern to that now found in cinemas. Their national survey was based on over 7,000 players in 9 regions around Britain. They found that 82.5 of the players were women, with an average age of 52.5 years. On average women players had started to play at the age of 38. For 71.2% of the sample bingo was the main leisure activity out-side the home.

Given this relative segmentation of cinema's audience, demographic trends are a more general source of pressure on attendances. According to the Office of Population Censuses and Surveys the number of people of pensionable age is projected to increase by 9% (800,000) between 1979 – 2011. Moreover, "... women, with their greater life expectancy now outnumber men at all ages higher than about 50, and the proportion of women in the population therefore increases with age. Generally some two thirds of people over the retirement ages are women." (9).

By contrast, OPCS projections at the other end of the age structure – 15 to 19 year olds – is for a decline of around 1 million by 1991 from the 1982 peak of around 4.7 million. (10)





3. Video

For a time, in the 1970s, it looked to some commentators as though cinemas had begun to find a stable minority position alongside broadcast TV: annual attendances went up (in 1974 and 1978) for the first time since the late 1940s. However, this slight levelling off was not sustained, and the downward spiral continued.

A key aspect of this continued pressure on cinemas has been the rapid rise in the number of video-cassette recorders. VCRs are the most recent and widely discussed example of a much more general upward trend in the sale of consumer durables for the home, a trend which has been a marked feature of the late 70s/early 80s (spurred on by government measures such as the abolition of HP controls) (11):

	VCRs in GB	% of households
December 1980	0.5 million	20.5%
December 1981	1.5 million	7.5%
December 1982	3.2 million	15.9%
December 1983*	5.0 million	24.9%
December 1984*	6.5-7 million	34%

* estimate. Source: *The Economist*, February 1983.

As with so many 'facts' about the video business, 'trade intelligence' remains divided about the breakdown of VCR use between 'time-shift' (recording TV programmes, especially films, to watch later) and the viewing of pre-recorded cassettes. However, the proportion of time spent on pre-recorded 'software' is generally agreed to be increasing, even if time-shift use remains predominant.

According to the British Market Research Bureau there were 96 million transactions of rental of pre-recorded tapes in 1982 (including illegal copies): virtually all of this will have been feature films. In a sample week, April 11-18 '83, the top ten rental cassettes in the *Video Business Top 40 Chart* were:

Title	Publisher
Arthur	Warner
The Evil Dead	Palace
Conan The Barbarian	Thorn EMI
Fort Apache-The Bronx	VTC
Kramer VS Kramer	RCA/Columbia
Airplane	CIC
Annie	RCA/Columbia
Escape from N.Y.	Embassy
Death Wish 2	RCA/Columbia
The Shining	Warner

All the other 30 titles in the Top 40 were feature films. A cautious estimate of 2 people

seeing each cassette still suggests that the audience for films via VCR-TV is now larger than that for films in cinemas. Although the figures vary – particularly in guessing the size of the 'pirate' copying market – there is general agreement in putting the total turnover of blank and prerecorded cassettes (rental or purchase) in the region of £200 million (inc. VAT) in 1982.

As with film, video 'publishing' is dominated by the US majors. The following chart gives an indication of the leading labels' share of the market in early 1983:

Companies	Percentage of the market
RCA/Columbia	19.1%
Warner	17.4%
CIC	14.9%
Thorn EMI	7.8%
Embassy	6.6%
Polygram/Spectrum	6.3%
Video Tape Centre	5.3%
CBS/Fox	5.0%
Scripflow	4.7%
Guild	3.3%
Intervision	2.1%
Walt Disney	1.9%
Others	5.6%

Source: *Video Business*. (1st Quarter Chart Share Survey, Jan-Mar '83.)

On this basis, the top 3 US companies have over 50% of the market.

4. Channel Four.

With a budget of £123 million for 1983 (including that for the Welsh channel), this new TV network is an object lesson in government intervention. After 1 year of broadcasting some 45% of the population watch its programmes for an average of around 2½ hours per head per week. A major strand in its programming is feature films – old & new Hollywood, foreign – language, specially commissioned.

Although the so-called 'narrowcasting' aspect of C4 has been ludicrously over-stated (12) its viewer profile is intended (and has managed) to be slightly nearer that of the cinema's audience than ITV, and provides yet another source of pressure on exhibitors.

5. VAT and the 'Eady' Levy.

In 1982, VAT and Eady levy together accounted for 16.7% of gross and 19.25% of net box-office takings at cinemas in Gt Britain. Arguments about the removal, alteration or continuation of these statutory measures have been prevalent for some time, and cannot be reviewed here. Suffice it to note that, in a context of marginal profitability for many venues, their effects have clearly been a contributory (though arguably not decisive) factor in the 'cycle of diminishing returns'.





SECTION

2

The position in London

From a mainstream standpoint, London is the premier region for cinema distribution and exhibition in Britain. In 1982 cinemas in the GLC area accounted for just under 29% of the gross box office takings in Britain (£30.8 million). This was over 3 times the size of the next biggest regional share – Scotland with gross takings of £9.97 million.

All the major distributors and cinema chains have their head offices in the GLC area (mostly in Wardour St), as well as their 'show-case' West End venues. The size of the cinema public in London meshes with the London

'Superman II' (EMI release): Deployment of prints

Week	GB total	Birmingham	Glasgow	Leeds	Liverpool	Manchester	Newcastle	London suburbs
1	222	2	1	1	1	2	4	54
2	238	3	1	1	1	2	3	54
3	241	3	1	1	1	2	3	51
4	221	3	1	1	5	20	3	36
5	192	7	1	1	6	20	5	27
6	144	7	1	1	7	18	5	11
7	139	6	2*	2	4	5	7	9
8	116	3	13	2	2	7	—	2
9	72	3	11	2	1	2	—	1
10	41	1	3	1	—	1	—	1
11	23	1	3	1	—	—	—	1
12	31	1	1	—	1	1	—	1
15	46	2	2	—	—	2	—	—

*Denotes two prints or two screens in use at the same cinema.

Source: MMC study.

RANK FILM



bias of national press and broadcasting organisations, and the promotional campaigns of distributors to make this area the most strategically decisive for film circulation. Put crudely, how 'well' or 'badly' a film works in London largely decides its chances elsewhere around the country.

A measure of the overwhelming importance which distributors and exhibitors attach to London's cinema audiences can be seen in the table published by the MMC showing the print release pattern for 'Superman II'. This was the most successful film of 1981 in terms of box office takings.

As the table shows, Columbia-EMI-Warner – the distributors – had over 240 prints of the film in circulation around Gt Britain by the 3rd week, with over 50 of this total deployed in the London suburbs alone. It should be noted that the MMC defined 'London suburbs' as 'cinemas in the GLC area, but outside the West End'. In other words, the GLC share of the 240+ peak print allocation will have been higher than 54.

Trends in London

London's strategic significance has not, however, insulated it from the long-term trends outlined above. As the accompanying tables show:

- The audience for films in London's cinemas has dropped by nearly 69% (1970-82)
- The number of people employed in cinemas has declined by 45% (1972-82)
- The total seating capacity of the remaining auditoria has been reduced by over two thirds (64.5%, 1970-82)

In 1982 alone, attendances went down by 24% of the 1981 figure, 16 screens closed and over 300 jobs were lost.

Table 7d – Cinemas – GLC Area

	No. of Persons Employed		
	Full-Time	Part-Time	Total
1972	2230	2142	4372
1973	1937	1804	3741
1974	1826	1874	3700
1975	1711	1779	3490
1976	1573	1855	3428
1977	1511	1686	3197
1978	1553	1712	3265
1979	1394	1907	3301
1980	1413	1522	2935
1981	1313	1389	2702
1982	1289	1110	2399

Table 7a – Cinemas – GLC Area

	Total Seating Capacity
1970	275,000
1971	264,400
1972	215,000
1973	181,400
1974	163,600
1975	144,500
1976	139,100
1977	130,000
1978	122,300
1979	120,500
1980	113,000
1981	102,900
1982	97,500

Table 7b – Cinemas – GLC Area

	No. of Cinemas	Admissions
1970	231	44,435,000
1971	232	40,999,000
1972	208	35,152,000
1973	223	29,097,000
1974	228	30,291,000
1975	234	25,419,000
1976	235	22,635,000
1977	246	22,341,000
1978	257	26,629,000
1979	261	23,815,000
1980	253	20,777,000
1981	258	18,239,000
1982	242	13,880,000

Table 7c – Cinemas – GLC Area

	<i>Box Office Takings (gross, inc. VAT)</i>	<i>Average Admission Charge (pence)</i>
	17,247,000	93 (old pence)
1971	18,046,000	44
1972	17,897,000	51
1973	16,997,000	58
1974	20,012,000	66
1975	20,405,000	80
1976	21,544,000	95
1977	24,272,000	109
1978	33,049,000	124
1979	38,160,000	152
1980	38,169,000	184
1981	38,429,000	211
1982	30,800,000	222

Video in London

The main branches of video as a 'software' business (i.e. excluding tape manufacture etc) are:

- 1 'Software' publishing
- 2 Cassette duplication
- 3 Wholesale distribution
- 4 Retail outlets

All these activities are now well developed in the London area, which has become – in the same way as (and largely because of) film – the main location of almost all the major companies operating in Britain. In my previous EPG Report I estimated the structure of this sector as follows:

<i>Branch</i>	<i>No. of people employed</i>
'Software publishing (approx. 65 companies)	1,000
Cassette duplication (approx. 20 companies)	350
Wholesale distribution (approx. 10 companies)	150
Retail outlets (approx. 2,000 sites)	4,000

Assuming that the illegal 'pirate' sector takes 50% of the market (i.e. is as large again) gives an employment total of 11,000.

No separate figures were found for the size of the 'film on video' audience in London, or its value in money terms. If the London – GB proportion for cinemas is used as a surrogate measure (i.e. we assume that video in London equals about 30% of the national market), we arrive at the following guesstimate:

- 29 million pre-recorded tape rentals in London in 1982

- An audience for film via VCR-TV of around 60 million people (2 per tape).

- A market for video worth about £60 million (inc VAT) at 1982 prices.

The commercial video business is clearly still in a very fluid state. WH Smiths and Woolworths are 2 notable examples of firms who have pulled out of video distribution after losing substantial sums (at least in part because of 'piracy', which has enabled small dealers to undercut them).

As in the earliest stages of the development of film production and distribution, those involved in the industry are not yet agreed on whether sale or rental is the best strategy. Nor, if rental is opted for, whether the distributor should rent to the retailers on a flat time period basis or on a percentage of each rental.

Sale has the advantage of reducing the scope for 'piracy', but limits overall the volume of transactions because of the high prices involved. (This has led one of the majors to try and solve this problem by slashing its sale price). On the other hand, rental results in a higher volume of transactions but is more open to abuse.

Because of the still very 'immature' state of the video market, barriers to entry remain relatively low at this stage, suggesting that there are opportunities for public intervention.



SECTION

3

Beyond Hollywood

The historical roots of this longstanding and unbroken domination of distribution and exhibition by the US majors and their English 'satellites' go back to the 1st World War.

No analysis of audio-visual culture in London can avoid acknowledging the continued power and presence of this 'Hollywood' system, even in a context where it has been forced to make its own adjustments to other social and cultural pressures, particularly to the rise of TV.

The analysis does not, however, stop there. For almost as long as cinema has been a significant issue in cultural life there have been organised groups and strategies trying to push on 'beyond Hollywood' in all its modes: of exhibition, distribution, production.

As regards distribution and exhibition, this activity – generally known now as 'independent' – has had a variety of particular emphases:

1 A concern to distribute and exhibit films (and later video-tapes) from national film cultures *other than* the North American. In its earlier (and still most developed) aspects this meant a stress on films from Europe – both 'West' and 'East'. Over time the perspective has been widened to include Africa, Latin America, Asia and elsewhere.

2 An awareness of the need to support the distribution and exhibition of film work being done in Britain and elsewhere *outside* the structure and assumptions (aesthetic and political) of the mainstream industries – work that has been persistently excluded from the 'normal' channels of circulation.



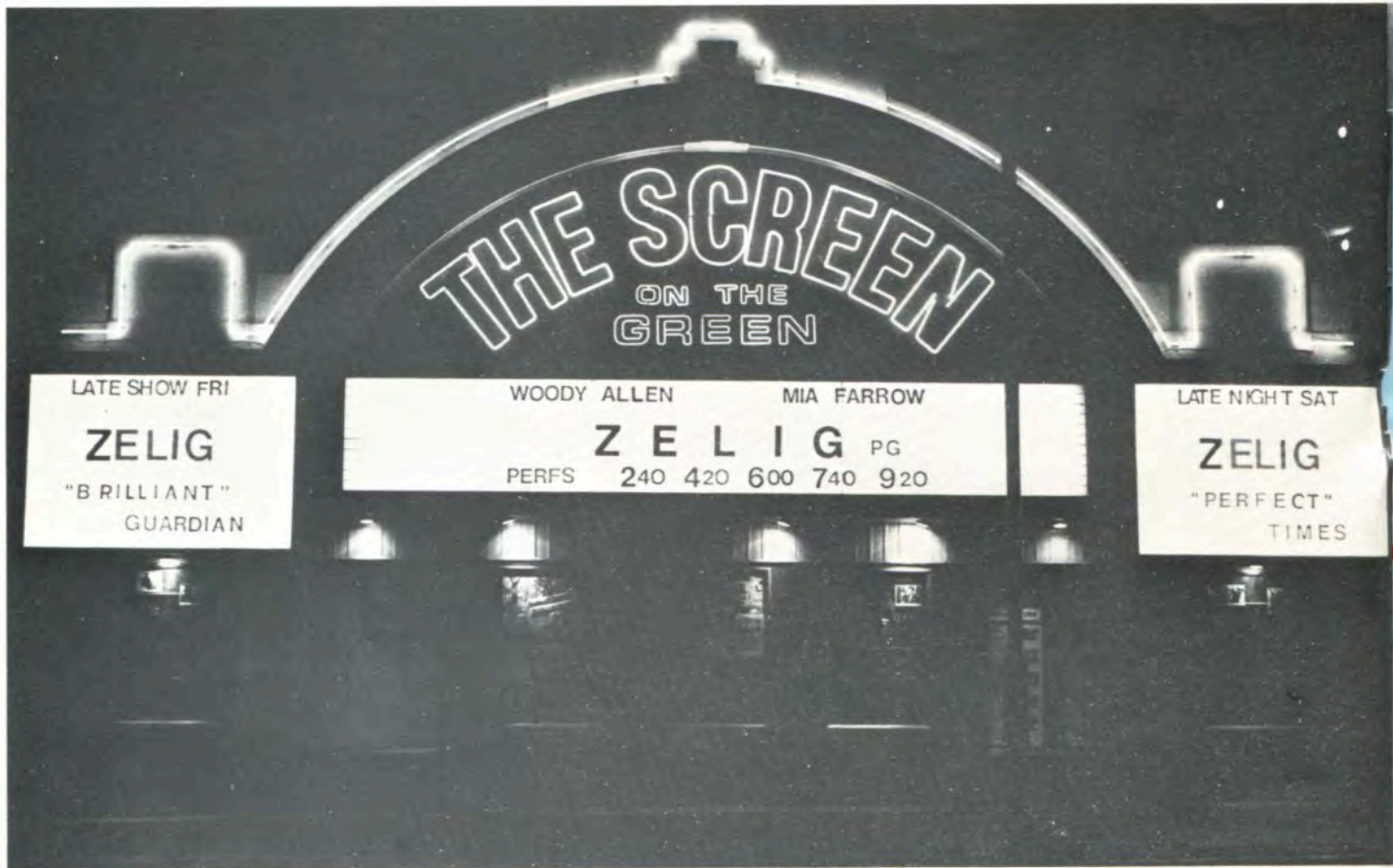
79 Wardour Street, base for The Other Cinema, London Video Arts, Independent Film and Video-Makers Association, Womens Film, Television and Video Network.

3 A variable insistence on the need to move beyond distributing or exhibiting 'different' films in traditional ways into changing the actual modes of distribution and exhibition practice.

Both the history and present structure of 'independent' work of this kind has been more varied, often less clear-cut, sometimes more mixed in its aspirations than any neat schema of the sort offered above will suggest. But what it has done – and its central significance for this analysis – rests in:

- Building a set of structures and mechanisms which have extended the effective range of choice, in terms of the films and tapes that can be seen in London.
- In some cases going further: into altering the relations of consumption – the conditions of viewing in which this wider range of production is seen.

A history of the successive phases in the emergence of this sector is beyond the scope of this survey. (13) Instead, what follows is a provisional commentary on 'independent' distribution and exhibition as currently organised in London.



Independent Exhibition

A. In aggregate, there exists now in the London area a substantial number of full-time independent venues. At the beginning of October '83, 25 auditoria on 20 sites were identified in this category, which therefore accounts for a little over 10% of the screens in the GLC area.

The majority of these venues have been established since 1970. Although the sector's

history over this recent past has not been one of steady progress – more venues have been opened during this time than remain in operation now – the trend overall is for a small but perceptible degree of growth in the number of independent sites.

Moreover, since this has taken place at a time when the major circuits have continued to close cinemas, the relative weight and 'visibility' of independent exhibition has grown considerably and can be expected to increase still further.

B. Although sharing 'difference' from the majors in common, these venues are also themselves varied in a number of significant respects:

- Almost all of them are private sector operations, and hence fundamentally dependent on box-office receipts for their continuing viability. Only a small minority are publicly run and dependent for some part of their income on grant aid from the BFI, GLAA, GLC, Borough councils etc.

- A majority of the privately run venues are 'aligned' – that is, owned by independent distributors who use them principally as '1st run' outlets for their own new film releases. (For example, the Camden Plaza, the Chelsea and the Lumiere cinemas are all owned by Artificial Eye, one of the leading distributors specialising in European 'art' films). The rest of the independent venues operate various types of 'mixed' programming: repertory, 2nd run, thematic seasons, etc. – taking films from a wide range of distributors, including the majors.

- Most of the venues are run on a 'club' basis, charging a membership fee on top of the basic ticket price. This makes them in technical/legislative terms not 'open to the public', and hence exempt from liability to pay Eady levy, and able to show films which do not have a British Board of Film Censors' certificate.

Given that they account for about 10% of London's screens, the total box office of these sites in 1982 should be in the region of £3 million, and their annual total admissions around 1,388,000 (a weekly average of over 26,000).

C. As well as these full-time venues there is now also a substantial amount of exhibition work done in film and video workshops, film societies, arts centres, galleries, and so on.

It is most noticeably in this area that the traditional modes of exhibition have been altered, alongside what gets shown (by, for example, the screening of work in progress, mixed media events, thematic programming with discussion).

The prime movers in this shift are the film and video workshops which have been built up in London since the late 1960s. (14). Some of these groups have now entered production for Channel 4 – working under the terms of the ACTT's Workshop Declaration. (15).

A note on video exhibition

To date, the 'exhibition' of video tapes has been almost entirely a domestic, TV related phenomenon – to an extent such that 'video' and the public viewing aspect of cinema have been treated as effectively distinct.

However, there does exist a small but important history of the public viewing of tapes,



Albany Video



Albany Video



and the general improvement in picture quality and cost of video 'projection' systems has already led to a succession of (still exploratory) instances of video display *in* cinemas. (16).

When – if at all – the transition to 'video cinemas' openly considered as such will take place, is bound to remain dependent on the economic/technical battle 'between electronics and photochemistry' now well under way at the international corporate level. (17).

Independent Distribution

A. As was noted above, a sizeable proportion of the independent sector is made up of aligned distributor/exhibitor operations. These companies have been largely responsible for the degree of erratic expansion in the number of venues which has happened in the last few years.

They also demonstrate the economic benefits which can be derived from control over exhibition (the other main revenue source now being sales to TV).

B. The other key grouping of independent distributors are those which have emerged in parallel with the development of the film and video workshops mentioned above. None of these have a full time aligned exhibition outlet, and are reliant on one or more of the 'non-aligned' independent venues for first runs etc.

Problems of 'independence'

To begin with, it is important to stress again, as was done in the Preface, the pivotal role of distribution and exhibition. At the optimum, this role is to bring into some sort of balance the money a given audience, group of audiences or 'market segment' is prepared to pay to watch a given range of films or videos, and the costs of producing those films.

At the level we are focussing on that means the costs of acquiring the rights to, and distributing those films or tapes.

As is the case with TV, economies of scale operate in this arena – economies which can generally only be partly off-set by subsidies from the public sector.

As a result, the independent sector has already begun to show the same trends towards the creation of chains and the vertical integration of distribution and exhibition which is prominent in the mainstream.

One of the questions which 'independence' raises (and which has been a recurrent theme in the debates over the Welsh 4th Channel) is at what point an available public can be too small to sustain its 'own' channels of distribution and exhibition.



Policy discussion has to ask at what level is this point reached, and whether the encouragement and/or subsidy of new entrants to this arena will have the effect of further subdividing an already limited sector – thus reducing the economic viability of all the existing participants by increasing their costs without a parallel rise in revenues.

As cinema has declined as a mass medium there has been a corresponding rise in the importance of reaching specialist audiences. The consumption of films now displays a tendency towards a 2 tier market – the 'mass' market having been taken over by TV and, increasingly, video, leaving to the cinema (especially in London) 2 main segments:

1. The remnants of the mass market, especially amongst the young, for 1st run new releases in the 'Hollywood' mould.
2. An art market where wealthier and/or more educated audiences will pay premium prices for a specialised product.

As has already been noted, the art-house sector has grown in recent years. The question is whether it will continue to grow (or even maintain its present size) in the face of competition from:

1. Specialist video distributors and Channel 4.
2. The moves of the majors themselves into this area e.g. Rear Window and Visconti's The Leopard, via their 'Classics' divisions.
3. The decline of the 'young-educated' student audience, both demographically and as a result of education cuts.

To make these points is to suggest that this sector may be at or near saturation point. At the very least, the signs of health in the area are ambiguous and contradictory: on the one hand, Artificial Eye, Mainline and Cinegate have been able to expand; on the other, the Paris Pullman has closed and the Phoenix is having difficulties, the Electric has been forced to finish as a repertory cinema, and the widespread move over to club status would seem partly to have been motivated by low box-offices.

Lastly it needs to be stressed that TV sales are now so vital an element in the economics of distribution that the programming needs and priorities of TV exert an increasingly powerful influence on the cinema repertoire.

To put this another way: if the overriding consideration is to spread the viewing of particular kinds of audio-visual output as widely as possible then TV must remain the foremost route; there is arguably very little justification for subsidising cinema exhibition *unless* elements of discussion, debate or education are included which TV cannot normally offer.

The closure or threatened closure of many circuit cinemas has already confronted the GLC

with the question of how it should respond. There has been considerable pressure to take over cinemas as 'community' ventures. It then has to be seriously asked whether public policy can swim against the powerful tide shifting the site of consumption for film and video into the home.

Moreover, if there is to be an agreed policy that this tide should be resisted, or even in places reversed, it does not necessarily follow that the public sector should saddle itself with a physical/technical infrastructure of a scale, design and location intended for a very different era with different patterns of consumption.

To defend 'cinema' means to defend an active conception of the shared public viewing of audio-visual work. It does not mean re-invoking what I have called elsewhere 'the spirit of '46'.

Independent Cinemas in London

	Seats	Type	Basic Ticket Price
Academy 1	516	Club	2.80
Academy 2	404	Club	2.85
Academy 3	96	Club	2.50
Barbican	280		2.50
Camden Plaza	340		2.80
Chelsea	700		3.00
Curzon	542		3.50
(Electric)	315	Club	2.30
Everyman	285		2.25
Gate Bloomsbury 1	266	Club	3.50
Club Bloomsbury 2	266	Club	3.50
Gate Mayfair	48	Club	3.75
Gate Notting Hill	282	Club	3.50
ICA Cinema	208	Club	3.00
ICA Cinemateque	50	Club	2.50
Lumiere	737		3.50
Minema	68		3.00
NFT 1	466	Club	2.85
NFT 2	162	Club	2.85
Phoenix	320		2.00
Rio	220		2.00
Ritz	491	Club	2.55
Scala	350	Club	2.80
Screen – Green	293	Club	2.75
Screen – Hill	300	Club	3.50

CONCLUSIONS

1. Film and video distribution and exhibition in London is dominated by the US majors and their English counterparts.

2. In terms of cinema exhibition and distribution the only significant counter-weight to this domination is provided by the various institutions making up the independent sector.

3. The GLC's policy making and resources should therefore be focussed on this area of film and video distribution and exhibition.

4. The main emphases of this commitment should be to strengthen the ability of the sector to plan its own future and make its work better known and supported.

5. These plans should take adequate account of the rapidly changing technical and institutional conditions under which audio-visual work is made and circulated.

RECOMMENDATIONS

1. The Council should make an explicit commitment to policy and funding designed to develop the structure of independent film and video distribution and exhibition in London.

2. In the light of such a policy, the Council should consider:

A. The possibility of setting up a cinema investment fund, to support selective measures of refurbishment and equipment renewal in the independent sector.

B. The possibility of setting up a single co-ordinated publicity and promotion system for all independent venues in London.

C. The possibility of setting up a distribution investment fund. This should cover a review of the scope for mechanisms for assisting with the costs of:

- i. Sub-titling non-English language films and videos
- ii. Film to tape transfer, both for broadcast and VHS uses.
- iii. Film print and tape purchase *and* renewal,

the production of catalogues and indexes of work available.

3. The Council should make a policy and funding commitment to the London based aspects of the research project on video distribution which is being organised by Albany Video.

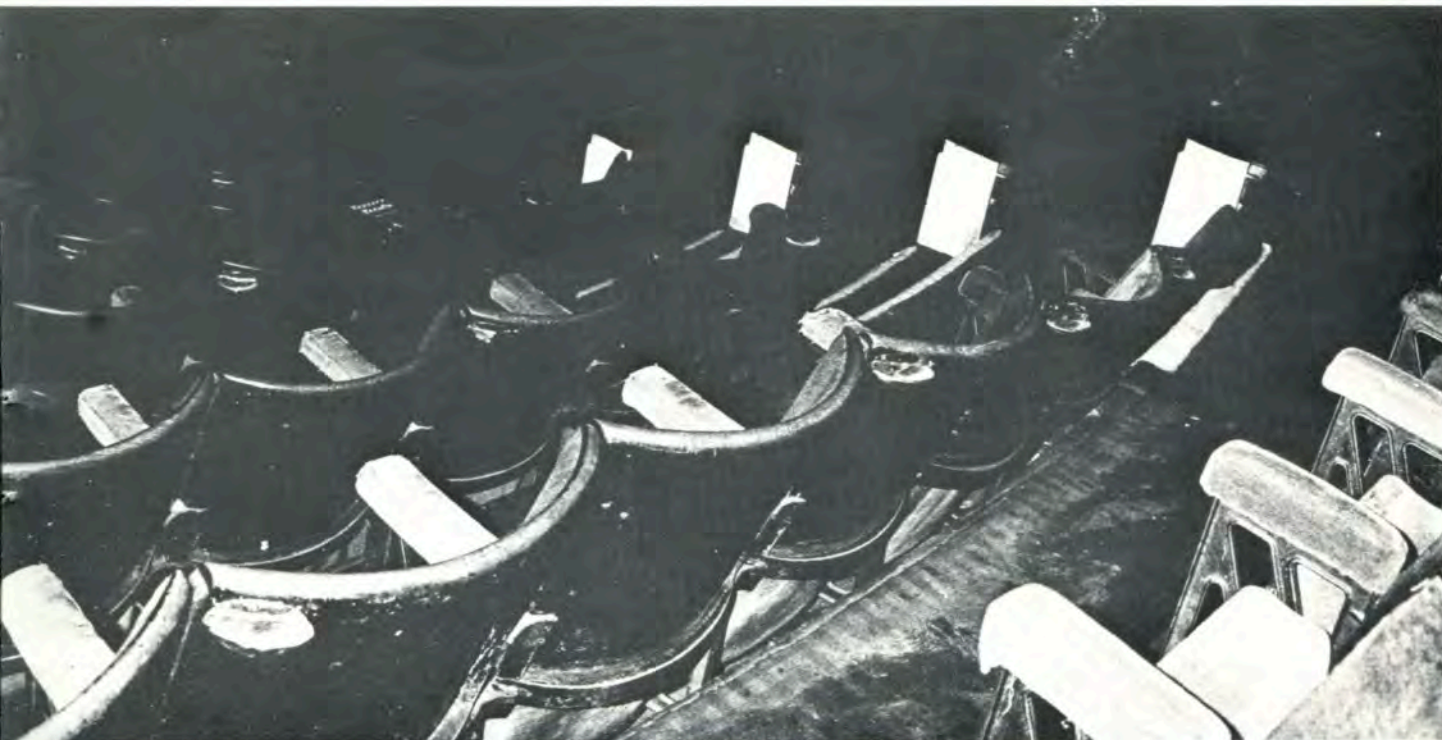
4. The Council should fund:

a. A feasibility study into the setting up of a new exhibition venue for film and video in the central London area.

b. A feasibility study into the setting up of women's media research/resource centre and cinema in the London area.

5. The Council should examine the possibility of establishing an 'independent forum' type festival. This should be pursued in consultation with the organisers of the 3rd Eye Festival, the LFF, and the Berlin Independent Forum.

6. The Council should fund a detailed research report into the audio-visual policy and funding process at EEC level.



7. The Council should fund a research programme on the implications for the independent sector of technical change in the audio-visual industry, including such questions as the future of 16mm film, video projection, 'electronic cinema chains', video discs, and so on.

8. The Council should look closely at the scope for computerisation investment in the work processes and promotional activities of distribution and exhibition.

9. Since the key purpose of film and video production is to communicate with an audience, intervention in support of production has to go on in parallel with intervention in support of distribution and exhibition. The Council should therefore investigate how best they can assist the integration of these areas, including perhaps in the 1st instance, by support for a full time worker to help coordinate the distribution and exhibition activities of film and video production groups and workshops in London.

10. To assist the implementation of the above recommendations the Council should itself appoint at least 1 full-time film and video officer – to help coordinate the policy making already going on in its various committees, and act as a focus for information and advice in the GLC's relations with the independent film and video sector.

Notes (1)

1. *A Report on the Supply of Films for Exhibition in Cinemas*, (Monopolies & Mergers Commission, Cmnd. 8858 May 1983)

2. *The Distribution of Films for Exhibition in Cinemas and by Other Means*, (5th Report of the Interim Action Committee on the Film Industry, Cmnd. 8530 March 1982).

3. See the *Business Monitor MA2 on Cinemas* for 1982 (HMSO 1983); and my commentary 'Cinema-Going, Going, gone?' in *Screen* July-October 1983.

4. See the *BFTPA Annual Report 1981-82* (London September 1982).

5. See note 2 above.

6. See Andrew Ehrenberg and Patrick Barwise, *How Much Does UK Television Cost?* (London Business School 1982).

7. From a National Readership Survey Special Analysis, September, 1981.

8. This discussion of bingo is based on the *Annual Reports of the Gaming Board of Gt Britain*, (HMSO); and the findings of Rachel Dixey and Margaret Talbot, set out in their study: *Women, Leisure and Bingo* (Trinity & All Saints College, Leeds 1982).

9. See John Craig, 'The growth of the elderly population' *Population Trends* 32, (OCPs, Summer 1983, HMSO).

10. See Anne Wicks, 'Plus ca change – observations on the changing consumer' *ADMAP*, April 1983.

11. See J Ramsbottom & H Lind, 'The Buys that could not wait' *Marketing* 11 August 1983;

and D Reilly, 'Fortress Britain – the sudden death of the big night out' *Campaign* 2 September 1983.

12. See my contribution to 'What's this Channel Fo(u)r?', ed. Blanchard/Morley (Comedia Publishing 1982); and the papers in *ADMAP*, March & April 1983.

13. See D. Macpherson (ed), '*Traditions of Independence*', (BFI Publishing 1980); S. Neale, 'Art Cinema as Institution', *SCREEN* Vol 22 No.1.

14. See on the history of this sector the chapter by Sylvia Harvey and myself in J. Curran & V. Porter (eds) '*British Cinema History*' (Weidenfeld & Nicolson 1983).

15. See R. Lockett, '*Cinema Manifesto*', *NEW SOCIALIST*, Nov/Dec 1983.

16. See the report on a video cinema trial by EMI in the *ACTT Annual Report* 1979–80; and the technical reviews by Barry Fox in *Broadcast* 23 May 1983 and in *New Scientist* 20 October 1983.

17. See T. Moore, 'Embattled Kodak enters the Electronic Age', *Fortune* 22 Aug '83

The Rio – A Model for the Future?

A discussion paper written by the staff at The Rio.

1. Background

The Rio cinema was taken over by a local management committee in 1979 as a "community cinema". With a total lack of revenue grants in the first three years, the struggles of the management and workers were much the same as at any independent cinema; how to pay the bills and keep the doors open. Exploratory revenue grants (£22,000 in total) from the GLC and Hackney in 1982/3, and a substantial grant from Hackney (£71,500) in 1983/4, together with capital money from the GLC, have changed this picture and allowed the Rio to really become a COMMUNITY CINEMA.

2. Defining Community Cinema

While many of the following elements can be taken into account when defining a community cinema, it should not be assumed that the existence of any of these factors in isolation should in itself constitute such a definition:

- a. location in an area of cultural/social deprivation
- b. locally managed/non profit-making
- c. based in a cinema building
- d. diverse in its activities and media used
- e. based on socialists principles
- f. exhibiting non-commercial work.

Even if all these factors exist, there still has to be an additional, overall strategy aimed at putting the project to best use with and for the community. Without this, the project is simply independent or non-commercial, without being community based.

3. Why Community Cinema?

3.1. Failure of other models

As the major chains increasingly rely on product which offers no real incentive to leave the video, and the art-houses having found their audience, recognise that it is not an expanding audience, anyone with an aesthetic, social or economic interest in communally viewed film must be seeking new ways forward.

3.2 Democracy and Decentralisation

Local control of cultural forms and outlets is the most effective way to combat the hijacking of culture and communications by a small, reactionary elite. Community cinemas should be able to combine what is best from



commercial culture with local and independent product, and with project work in related media, to create:

- a. a real choice
- b. a sense of control of what one sees
- c. movement towards control of the media by its workers and spectators.

4. How the Rio Works

4.1. The Rio is managed by an local committee, elected annually, which combines media workers with community activists and committed individuals.

4.2. The Rio employs 5 full time workers, 9 part-time workers and 3 cleaners. It also involves many local volunteers.

4.3. The cinema is open seven nights a week for its film programme, and also on Sunday afternoons, Thursday afternoons (for schools or playschemes and the general public) and extra days for special programmes (media showcases, matinees for the elderly etc.)

4.4 Programming is carried out within non-sexist and non-racist guidelines, but attempts to be as varied as possible, showing the best of commercial cinema plus films of special artistic, historical, social or local interest.

4.5. After early experiments with a very mixed programme, the project now has a commitment to film as its central activity, with other forms complementing or being complemented by it – all live events in the past year have, for example, incorporated film into their programme, and the Rio is just about to embark on a large-scale experiment in combining film and live local bands.

4.6. Other aspects of the Rio's work include slide advertising for local groups and businesses, a slide newsreel created by unemployed young people, a small exhibition space, collaboration with local organisations for benefits, meetings, stalls etc., the use of locally produced music in intervals etc., and future plans include a creche, the installation of a computer and flat screen video projector (which also looks ahead to the coming of cable and the need for communal viewing points), the developing of slide and other archives, and the creation of space for a second screen and social facilities.

5. Remaining Challenges

5.1. The Rio in 1983 is a positive, forward looking project offering an alternative to traditional cinema exhibition. There remain, however, a series of only partly-solved problems, which those looking to the Rio as a model would do well to consider:

5.2. Funding

Of its Hackney grant for 1983/4, approximately £50,000 is revenue. This pays the salaries of the full time workers. Everything else has to come from the box office take (estimated at £64,000 this year), or fund-raising. As being a community cinema offers no immunity from box office disasters like the world cup or the heatwave, this can cause enormous cash flow problems, particularly when the project starts from a poor financial base, as the Rio did, and as others may start if they are changing over from being another kind of cinema. Such funding also inhibits project development. Local authorities considering funding community cinemas should therefore recognise that a high and stable level of subsidy is required.

5.3. Premises

Most cinema buildings make bad community venues, without considerable investment. The Rio needs an estimated £300,000 spent on it to bring it up to scratch. At present it has a tiny office, designed only for a manager to have space to cash up, and no small spaces for alternative screenings, workshops, meetings and social gatherings. Such problems should not be minimised in assessing the feasibility of a project.

5.4. Product

Certain groups within the community are very badly served by available product. However large a black community there is on the Rio's doorstep, it is impossible to conjure up much after you have shown *BABYLON*, *PRESSURE*, *ROCKERS*, *THE HARDER THEY COME* and *BURING AN ILLUSION* for the tenth time. The Rio has two main ways of trying to redress this imbalance – first by incorporating other cultural events, such as live music, into its programme, and second by developing new methods of exhibition (eg. flat screen video projection) in order to show local product.

5.5. Coping with the Commercial World

Faced with distributors who would rather burn prints than have them shown as part of a creative programme, and being physically near a chain cinema which gets first choice on many of the better commercial films because, unlike the Rio, it will also take the worst, the Rio is all too aware of what little impact it is having on distribution patterns. While cinemas of this kind remain few and far between, those managing them need to have a realistically low expectation of the amount of control they have over what they exhibit.

5.6. Building a Movement

The Rio is at present isolated. It has good relations with other independent cinemas in London, yet its aims and bases of operation are not the same. It has good relations with the BFI, yet it would never wish to follow the Regional Film Theatre model. It has its local community allies, and allies within parallel cultural movements, but it has no-one with whom, on the specific question of community

cinema, it can sit down and build joint strategy. If it is a serious attempt to influence how film and video is shown, and, indeed, produced, it needs those allies, or many of the problems described will remain intractable.

6. Conclusion

The Rio is an exciting experiment which needs to be taken up as a model elsewhere. There is now a group of people at the Rio who can help others who are considering taking the same path. The Rio itself is still far from secure, finished and fully funded, and its staff have therefore to develop their own project at the same time as giving support to others. Such support is, however, very much on their list of priorities, because they recognise that you cannot build an alternative structure in isolation. Ways need to be found, therefore, to help the Rio and other projects develop until a stable network exists. It is a crucial development, and one which should be important to everyone with an interest, direct or indirect, in the future of film and its exhibition.

Abolition of the Greater London Council and the Metropolitan County Councils:

The Government's Proposals for the Arts

The Greater London Council and Metropolitan County Councils have contributed to performing arts organisations, and maintained museums, art galleries and theatres in their areas. The White Paper "Streamlining the Cities. Government Proposals for Reorganising Local Government in Greater London and the Metropolitan Counties" (Cmnd 9063) outlines in paragraph 2.15 the Government's proposals in this field, as follows:

"Support for the Arts

2.15 The GLC and MCCs have concurrent powers with district and borough councils to make grants for the support of the arts and to maintain institutions such as art galleries, museums and theatres. The Government will look to the borough and district councils to assume nearly all the GLC's and MCCs' responsibilities and interests in this fields. Voluntary co-operation between the local councils will be encouraged and facilitated through the Regional Arts Associations and the Area Museum Councils. In a small number of cases the Government propose to make provision from central funds to replace the contributions now made by the GLC and MCCs to certain arts institutions and organisations of national significance. For the museums and galleries in this category the Trustees of appropriate national museums and art galleries will be invited to take responsibility for the channelling of central resources; similar arrangements will be made with the assistance of the Arts Council for an increase in central support to certain performing arts organisations."

2. This paper sets out the Government's proposals in more detail and is intended as a basis for discussion with those concerned.

The Government's general approach

3. The Government's intention is that the arrangements for public support of the arts in the GLC and MCC areas after reorganisation should permit the continuation of existing public expenditure plans in this field. Those

plans will of course continue to be subject to present review procedures. Adjustments in the method of distributing Rate Support Grant and calculating grant-related expenditure will be made to take account of the transfers of responsibilities for arts bodies following reorganisation. The Government also wish local authorities and arts bodies to pursue private patronage and sponsorship of the arts with vigour. At a time of many pressing demands on public resources, development and growth in the arts must depend substantially on such private support. Arts organisations and local councils will need therefore to work together to create an attractive environment for private spending on top of provision from public funds; there is great scope for entrepreneurial initiative in this field.

4. Under the reorganisation proposals, the institutions and activities hitherto supported by the GLC and MCCs will in most cases look for support primarily from the district or borough councils in whose area they are located. The Government will expect the councils to provide an appropriate level of support for arts activities, and to recognise that these activities can in themselves be social and economic assets, which can add greatly to the quality of local life and attract inward investment and jobs. In some instances, especially where the activities also benefit neighbouring areas, there are cogent reasons for voluntary co-operation between the councils concerned in sharing the funding and administration of such activities to the benefit of their own communities. The Regional Arts Associations and the Area Museum Councils will also have an important part to play in encouraging co-operative effort and the developments of suitable arrangements for projects or services which go beyond the boundaries of individual authorities.

5. The Government recognise, however, that a small number of the theatres, orchestras, museums and art galleries which have hitherto relied substantially on the GLC or MCCs for support are of such national or even international significance that borough and district councils could not reasonably be expected to provide for them on a similar scale. The following paragraphs detail the central support proposed by the Government for these few organisations and institutions.

Museums and Art Galleries

6. The Museum of London is governed by an Act of Parliament which provides for its control and funding to be shared equally between the Government, the City of London Corporation and the GLC. The Government believe that a major share in the control and funding should continue to rest with local government interests in London. It therefore proposes that the Act should be amended so as to allow the City Corporation, in whose areas the Museum stands, to assume such a



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share with the Government carrying the residue.

7. In the case of five other museums and galleries the Government, having particular regard to the wider significance of their collections, consider that it would be appropriate for their control and funding to be recognised as a national responsibility. The Government would not wish, however, to create new national public bodies for this purpose; they propose therefore to invite the trustees of appropriate national collections to take responsibility for administering these institutions, a responsibility which they would no doubt exercise through small committees with a significant element of local membership. Financial provision would be made in recognition of the transfers of responsibility. The specific institutions for which such arrangements are proposed are the following:

The Horniman Museum (London) – The trustees of the British Museum.

Kenwood and the Geffrye Museum (London) – The trustees of the Victoria and Albert Museum.

The Walker Art Gallery (Liverpool) and the Laing Art Gallery (Newcastle) – The trustees of the Tate Gallery.

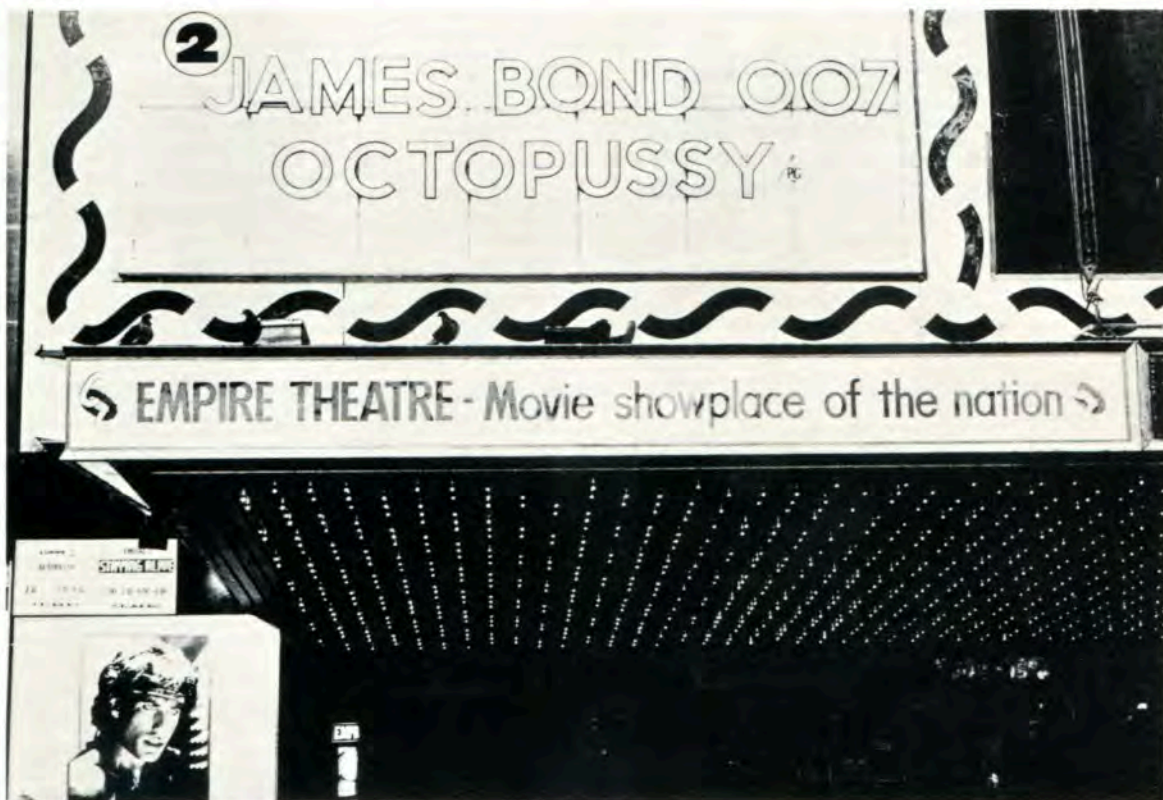
The Performing Arts

8. The Government propose to make arrangements for an increase in central support, to be provided through the Arts Council, for a small number of organisations of national and international standing, which have been supported by the GLC and/or the MCCs and which already enjoy substantial Arts Council funding. These major organisations will be expected to continue to attract local finance and support, in addition to the money raised at the box office. The organisations for which such increased help will be provided are the following:

The National Theatre
The English National Opera
The London Festival Ballet
The London Orchestral Concerts Board
The Halle Orchestra
The Royal Exchange Theatre, Manchester
The Royal Liverpool Philharmonic Society
Opera North
The City of Birmingham Symphony Orchestra

The South Bank Complex, London

9. The GLC owns and operates the Royal Festival Hall and the associated concert halls, and owns the freehold of the adjacent buildings on the South Bank which are occupied by



*The Empire Theatre, circa 1897.
Courtesy of The British Film Institute.*

The Empire, Theatre, 1983

the National Theatre, the Hayward Gallery (Arts Council) and the National Film Theatre (British Film Institute). The size and variety of the activities provided for in this complex of buildings raise problems of a different kind from those considered above. It would not be feasible to single out one or two of its constituent parts for special provision on the lines of the arrangements proposed in preceding paragraphs: the South Bank is a focus for a wide range of nationally important arts activities in London, and each part draws strength from the whole. The complex constitutes an international artistic presence which benefits, culturally and economically, not only those directly associated with it but London and the nation as a whole. The complex constitutes an international artistic presence which benefits, culturally and economically, not only those directly associated with it but London and the nation as a whole.

10. The Government propose that the South Bank complex should continue to be administered as a single entity, with its assets transferred (subject to existing tenancies) to an independent board of management answerable to the Arts Council. The Arts Council would make funding available where necessary, but the complex as a whole would be expected to be run as far as possible on commercially viable lines while retaining the cultural activities and interests which currently flourish there.

Consultations

11. The Government invite views and comments on the proposals set out in paras 6–10 above, by 31 January 1984. They should be addressed to the Head of the Office of Arts and Libraries, Great George Street, London SW1.