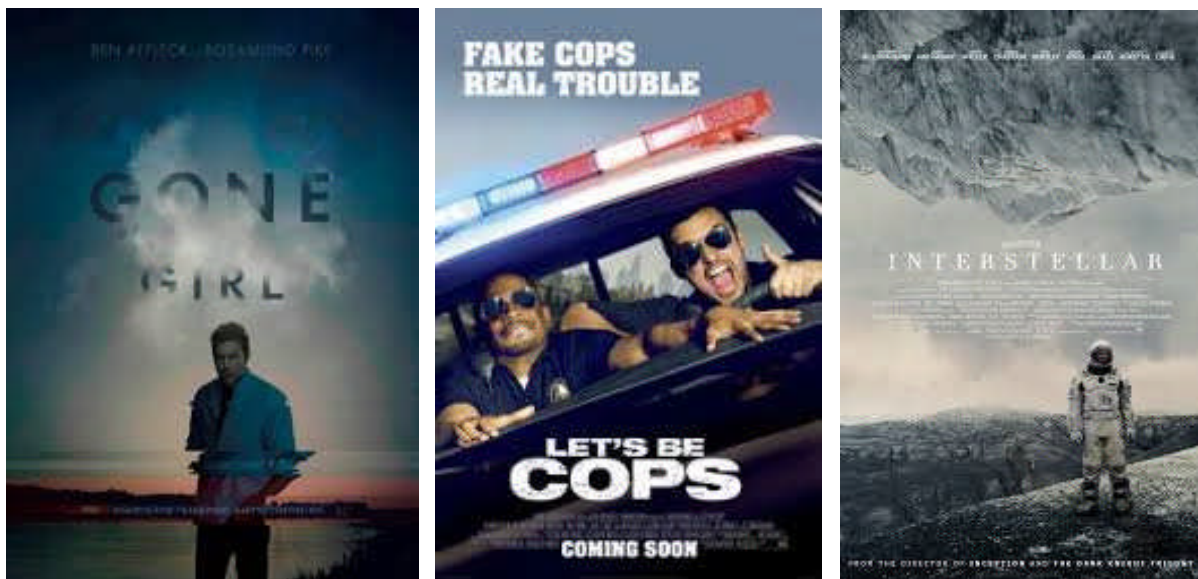




A random survey of Kempsey Shire residents to measure cinema visitation patterns and support for a commercially-operated cinema in Kempsey



A random and statistically valid telephone survey of 406 residents living in the Kempsey Shire, conducted by Jetty Research on behalf of **Kempsey Shire Council**

FINAL REPORT dated November 26th 2014

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Executive summary

In November 2014, Kempsey Shire Council commissioned Jetty Research to conduct a random and representative telephone survey of residents to establish support for Council's efforts to attract a commercially-run cinema to Kempsey.

The survey comprised a +/- 6 minute interview with 406 randomly selected adult residents living within the 2440 and 2431 postcodes. (See pages 5-6 for further detail on survey methodology, and Appendix 1 for the questionnaire.)

Results should be representative of all adult residents living within the 2440 and 2431 postcodes to within +/- 4.8 per cent, in 19 of 20 such surveys conducted. (See page 6 for further detail on sampling error.)

Among the survey's conclusions:

1. 35 per cent of respondents said they had been to the cinema in the past six months, and 50 per cent claimed to visit a cinema regularly (monthly or more) or occasionally (a few times a year). Of cinema-goers, 61 per cent typically used the Port Macquarie facility, 31 per cent the South West Rocks cinema, and 29 per cent the Nambucca theatre.
2. When seeing movies, 68 per cent of cinema-goers also had a meal. One-third shopped for clothes etc, and 15 per cent also did their grocery shopping.
3. Of those not currently attending the cinema regularly, the main reason for non-visitation was the inconvenience caused by not having a cinema in Kempsey (with 67 per cent agreeing this was a factor). Conversely, only 23 per cent said it was because they couldn't afford to go more often, and just 12 per cent (or 10 per cent of the overall sample) said they didn't like going to the movies.
4. 50 per cent of those surveyed felt it was "very important" for Kempsey to have a commercially-operated cinema, with a further 31 per cent seeing it as "quite important". Conversely, just 17 per cent felt it was not important.
5. In a similar vein, 68 per cent strongly supported Council's efforts to attract a commercially-operated cinema to Kempsey. Total support for Council's efforts was 84 per cent.
6. 17 per cent of respondents said that if such a cinema existed, they would be likely to visit every week or two. A further 36 per cent believed they would use the cinema once a month on average.
7. 52 per cent said they would be prepared to make a personal donation to support Council's efforts to fund a local cinema. Among existing cinema-goers, this figure was 61 per cent.

A handwritten signature in black ink, appearing to read "James D. Parker".

James Parker, B. Ec, Grad Cert Applied Science (Statistics), AMSRS
Managing Director
November 26th 2014



Introduction

Background

Due to longstanding requests from residents, Kempsey Shire Council is examining the possibility of assisting with the establishment of a commercially-operated cinema complex in Kempsey. As part of its feasibility study and funding application, Council has commissioned Jetty Research to conduct a random and representative telephone survey of 400 local residents on the subject.

Specific survey objectives comprised:

1. Understanding existing cinema attendance (frequency, location etc.);
2. Measuring support for a cinema complex in Kempsey;
3. Measuring likely visitation patterns among different groups;
4. Measuring willingness to fund construction cost.

Methodology

The survey was conducted using a random fixed line telephone poll of 406 residents aged 18 and above. Respondents were selected at random from a verified random sample residential telephone database of 3,300 residential telephone numbers within the two postcodes under investigation¹. A survey form was constructed collaboratively between Council management and Jetty Research (see Appendix 1), based on satisfying the above objectives.

Polling was conducted from November 12th to 17th 2014 from Jetty Research's Coffs Harbour CATI² call centre. A team of ten researchers called Kempsey and South West Rocks residents on weekday evenings from 3.30 to 8pm. Where phones went unanswered, were engaged or diverted to answering machines, researchers phoned on up to five occasions at different times of the afternoon or evening.

The poll was conducted on a random basis, although we did attempt to ensure a robust mix of ages, genders and postcodes³. Respondents were screened to ensure they were aged 18 or more.

Survey time varied from 4 to 14 minutes, with an average of 6.5 minutes. Response rate was excellent for a Council survey, with 58 per cent of eligible households reached agreeing to participate.

Please note that due to the nature of the survey, not all respondents answered every question. The number of respondents answering each question is marked as "n = XXX" in the graph accompanying that question.

¹ As per Council requirements, postcodes sourced were 2440 and 2431.

² Computer-assisted telephone interviewing

³ With Council requesting approx. 300 residents from the 2440 postcode, and 100 from the 2431 postcode.



Where differences in this report are classed as significant, this implies they are statistically significant based on independent sample t-scores or other analysis of variation (or ANOVA) calculations. In statistical terms, significant differences are unlikely to have been caused by chance alone.

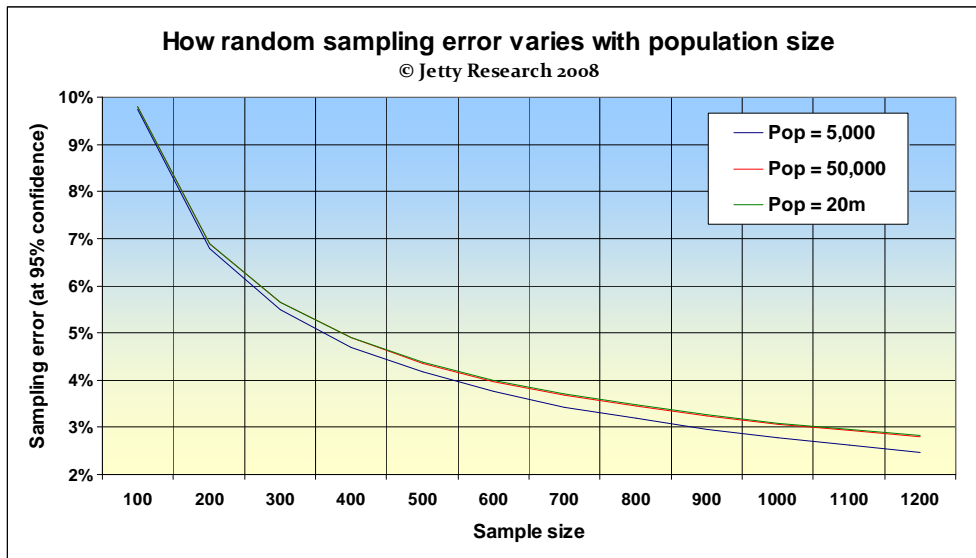
Data has been post-weighted to match the demographic profile of the Kempsey LGA by age and gender, as per the 2011 ABS Census.

Sampling error

According to the 2011 ABS Census (Usual Resident profile) the total combined population of the 2440 and 2431 postcodes was 26,326⁴. A random sample of 406 adult residents within these two postcodes implies a margin for error of +/- 4.8 per cent at the 95 per cent confidence level. (This means in effect that if we conducted a similar poll twenty times, results should reflect the views and behaviour of the overall survey population to within a +/- 4.8 per cent margin in 19 of those 20 surveys.)

As Graph i shows, margin for error falls as sample size rises. Hence cross-tabulations or sub-groups within the overall sample will typically create much higher margins for error than the overall sample. For example using the above population sizes, a sample size of 100 exhibits a margin for error of +/- 9.8 per cent (again at the 95 per cent confidence level).

Graph i: How sampling error varies with sample and population size



In addition to the random sampling error, above, there may also be various forms of non-random sampling error which may have affected results. These include respondents without fixed line phones, the proportion of non-respondents (refusals, no answers etc.) and/or imperfections in the survey database.

⁴ Of which 80 per cent lived in the 2440 postcode.

Sample characteristics

The following breaks down the survey sample by age, gender and place of residence:

Table i: Breakdown of survey sample by age, gender and postcode (unweighted)

Age * Gender * Postcode Crosstabulation

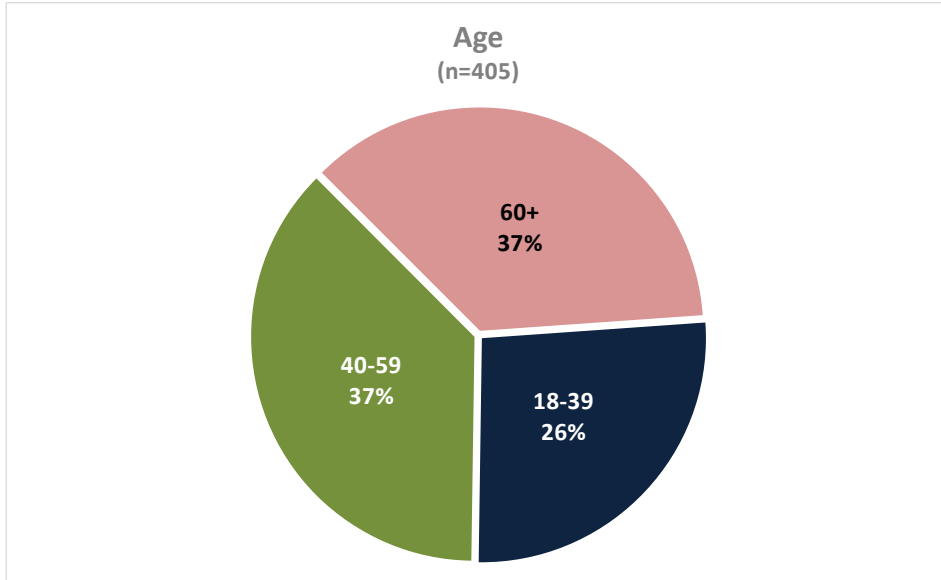
Postcode				Gender		Total
				Male	Female	
2440	Age 18-39	Count	21	45	66	
		% of Total	6.9%	14.8%	21.6%	
	40-59	Count	53	106	159	
		% of Total	17.4%	34.8%	52.1%	
	60+	Count	24	56	80	
		% of Total	7.9%	18.4%	26.2%	
Total	Count	98	207	305		
	% of Total	32.1%	67.9%	100.0%		
2431	Age 18-39	Count	7	4	11	
		% of Total	6.9%	4.0%	10.9%	
	40-59	Count	16	25	41	
		% of Total	15.8%	24.8%	40.6%	
	60+	Count	21	28	49	
		% of Total	20.8%	27.7%	48.5%	
Total	Count	44	57	101		
	% of Total	43.6%	56.4%	100.0%		

Note that these are raw (i.e. unweighted) figures. As noted previously, results in this survey have been post-weighted by age and gender to match the population profile of the Kempsey LGA, as per 2011 ABS Census data.

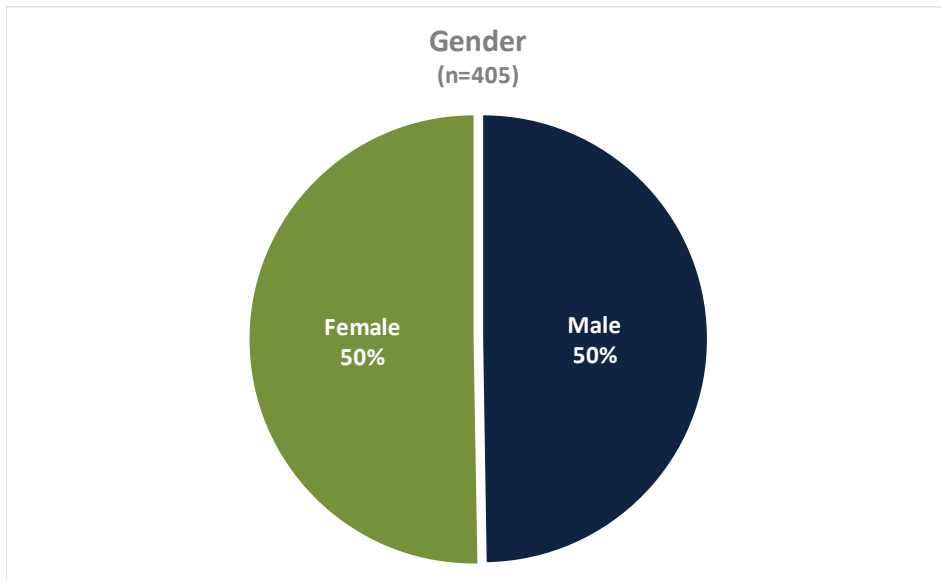
See Part 1 of this report for a detailed breakdown of the survey sample, by a range of different demographic factors.

Part 1: Survey demographics (weighted)

Graph 1.1: Age Range

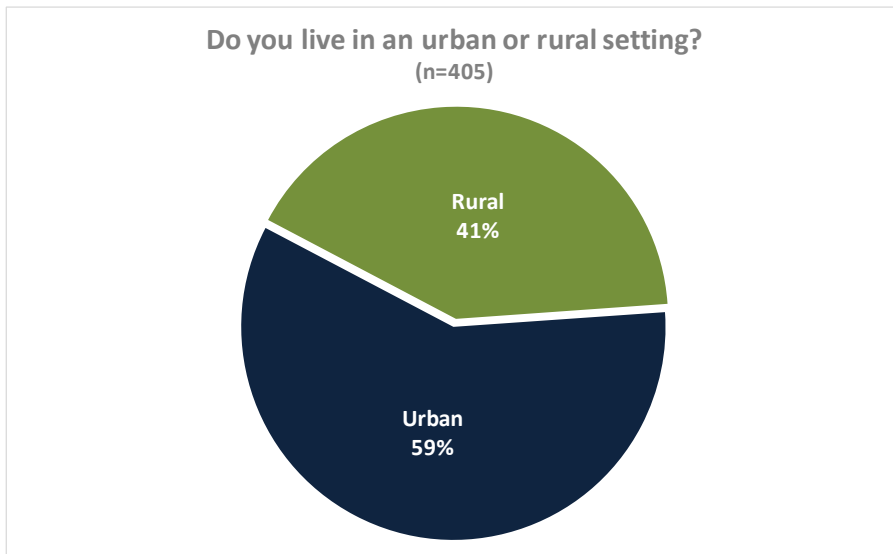


Graph 1.2: Gender



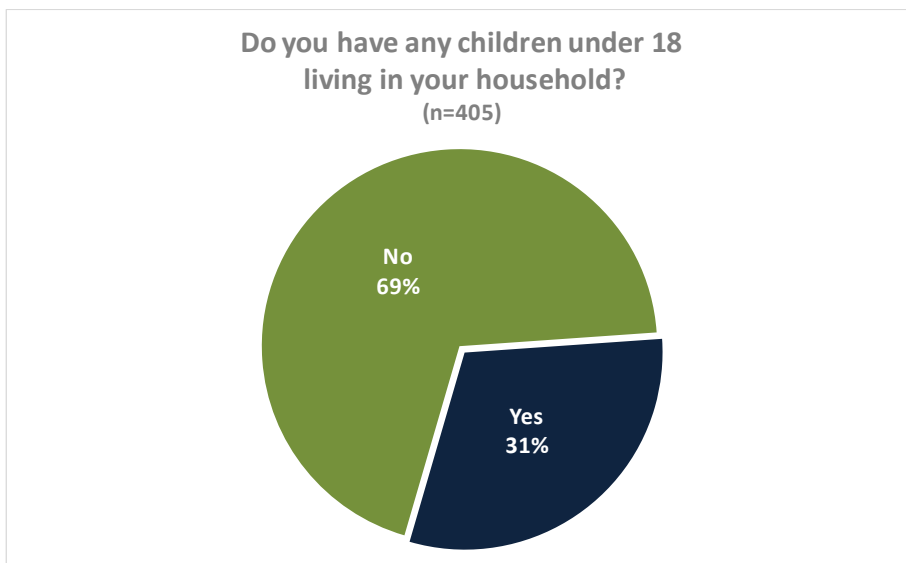
The survey sample displayed a robust mix of age and gender. (Note that while the above data is weighted, minimal re-weighting has been required in this instance due to an excellent mix within the sample.)

Graph 1.3: Urban vs. rural



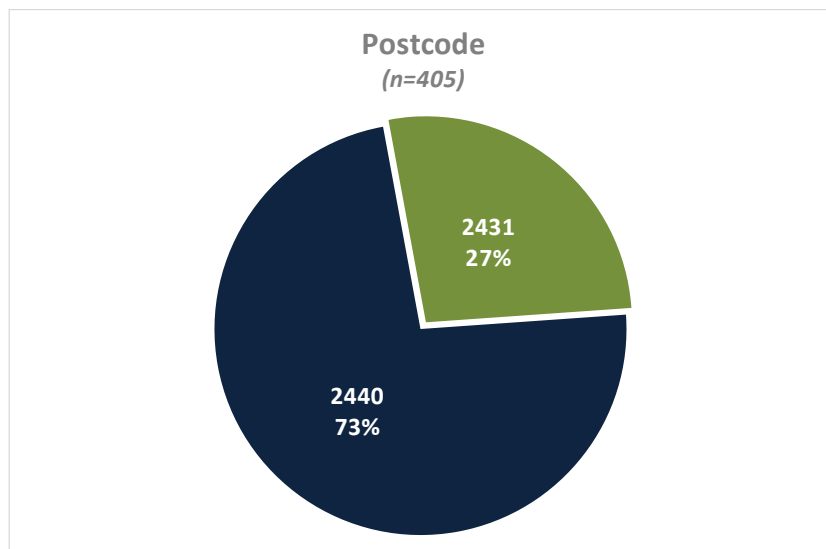
Three in five respondents lived in an urban setting, with the balance based rurally.

Graph 1.4: Children under 18 living in house?



Just under one-third of the sample had children aged under 18 living within their home.

Graph 1.5: Postcode

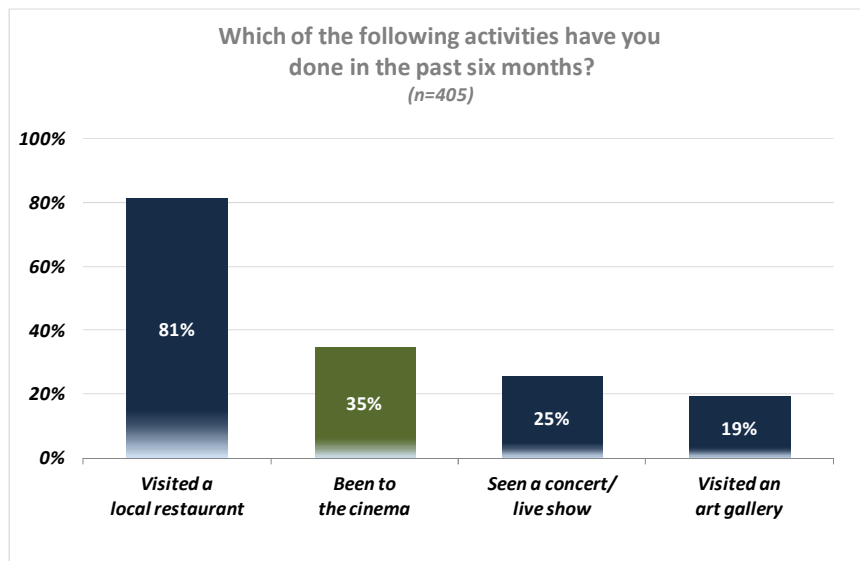


As noted previously, Council requested that approximately three-quarters of the sample come from the 2440 postcode (with the balance from the 2431 postcode). This was achieved.

Part 2: Cinema attendance

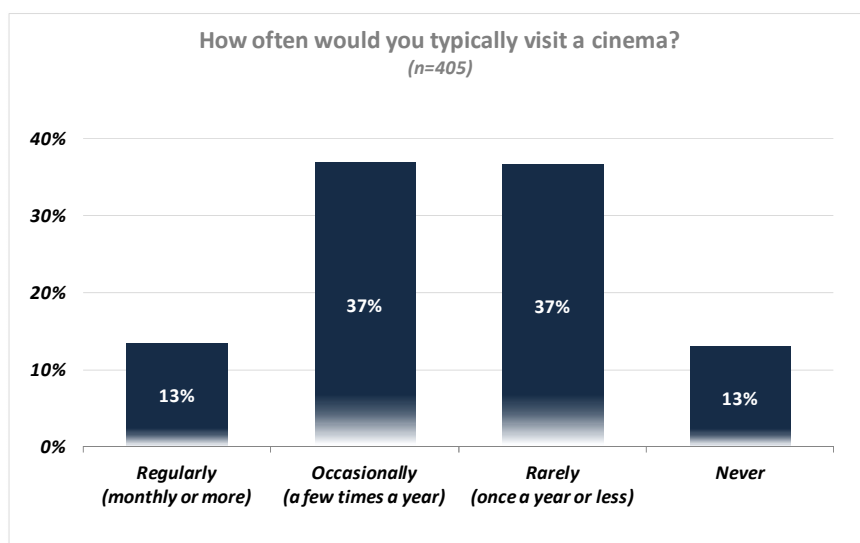
The survey proper began with a series of questions designed to understand existing cinema-going behaviour of Kempsey and South West Rocks residents. (In order to avoid biasing response, respondents were not aware at this point of the survey’s subject matter.)

Graph 2.1: Which of the following activities have you done in the past six months?



“Hidden” within four activity statements, just over one-third of respondents said they had been to the cinema within the past six months. This figure included 51 per cent of those respondents aged 18-39, against just 26 per cent of those aged 60-plus. (There were no significant differences by gender, urban/rural, whether there were children living in the house, or postcode.)

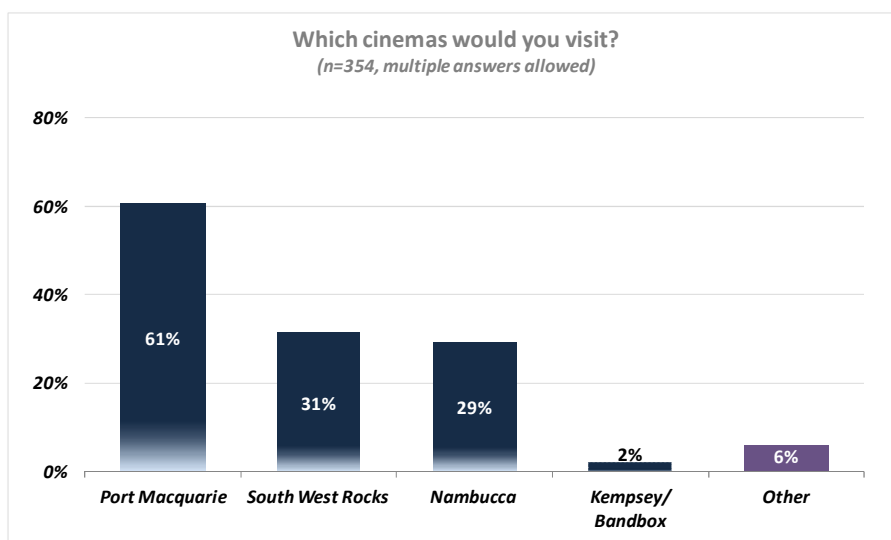
Graph 2.2: How often would you typically visit a cinema?





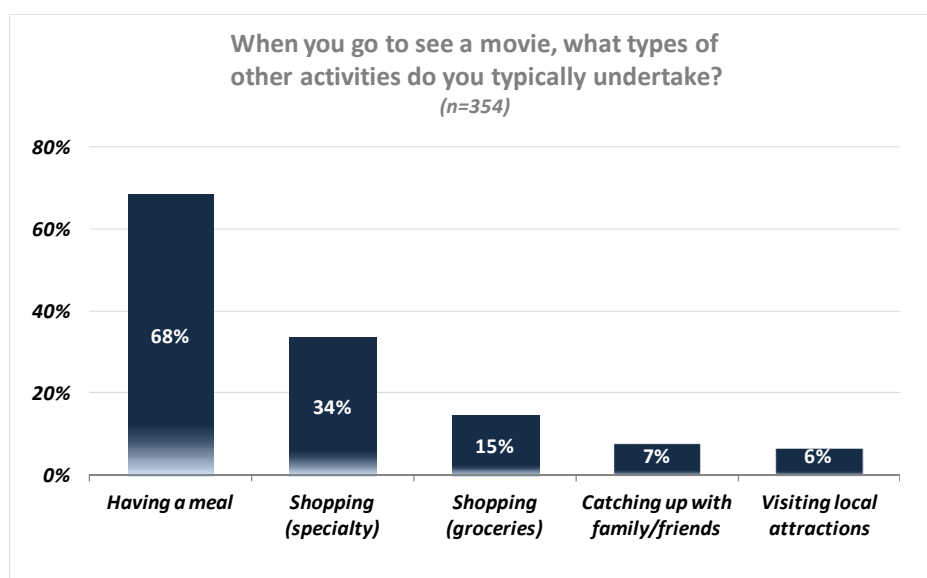
When asked specifically how often they visited the cinema, 13 per cent of those surveyed said they attended monthly or more. A further 37 per cent said they went occasionally (defined as a few times each year). This suggests that roughly half the population could be classed as cinema-goers.

Graph 2.3: (Unless “never” in Graph 2.1) Which cinemas would you visit?



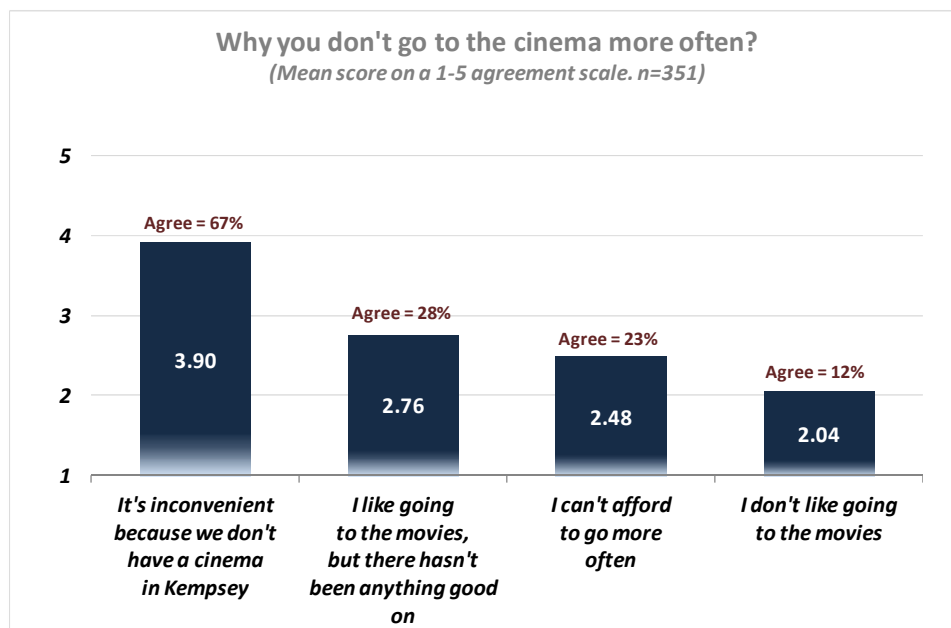
Of those saying they went to the cinema, six in ten went to Port Macquarie for this. Just under one-third had been to the cinema in South West Rocks, while a similar proportion used the Nambucca Cinema.

Graph 2.4: When you go to see a movie, what types of other activities do you typically undertake? (unprompted)



When asked (unprompted) what other types of activities they typically undertook when going to see a movie, over two-thirds said they went for a meal. And a third did some form of specialty shopping (fashion, homewares etc.). Fifteen per cent also shopped for groceries.⁵

Graph 2.5: (Unless “regularly” in Graph 2.1) To what extent do you agree or disagree with the following statements regarding why you don’t go to the cinema more often?



Those who claimed to visit the cinema less than once a month were then asked to what extent they agreed with four different statements as to why that was the case. The overwhelming reason for non-attendance was the inconvenience of not having a local cinema (with 67 per cent agreeing, and a mean agreement score of 3.90 out of a possible 5).

The inconvenience factor was most likely to be raised by rural respondents, and those with children (with mean scores of 4.07 and 4.14 respectively). However it was consistent by age and gender.

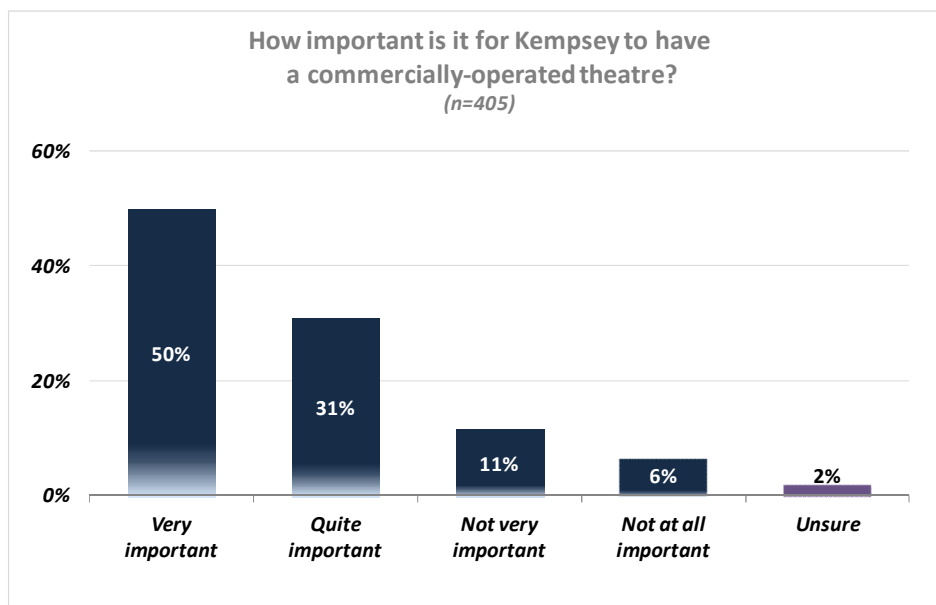
Conversely, only 23 per cent claimed their non-visitation was because they couldn't afford to go more often – and only 12 per cent of non-attenders (i.e. 10 per cent of the overall sample) said they didn't like going to the movies. That in turn suggests that +/- 90 per cent of the adult population are potential cinema-goers.

⁵ While these figures are a useful reminder of the multiplier effect of cinema attendance, they are unlikely be replicated to the same degree in Kempsey due to the reduced travel time involved in local cinema attendance.

Part 3: Attitudes towards a cinema in Kempsey

At this stage, the survey script noted that *“The community has repeatedly told Council that Kempsey needs a cinema.”* Respondents were then asked how important they felt it was for Kempsey to have a commercially-operated cinema, from five prompted options:

Graph 3.1: How important do you think it is for Kempsey to have a commercially-operated cinema?



Half of those surveyed agreed it was “very important” for Kempsey to have a commercially-operated cinema in the city. And a further 31 per cent felt it was “quite important”. In all, 81 per cent of respondents denoted some level of importance to having a local cinema.

Conversely 17 per cent did not see the issue as important, with 2 per cent unsure.

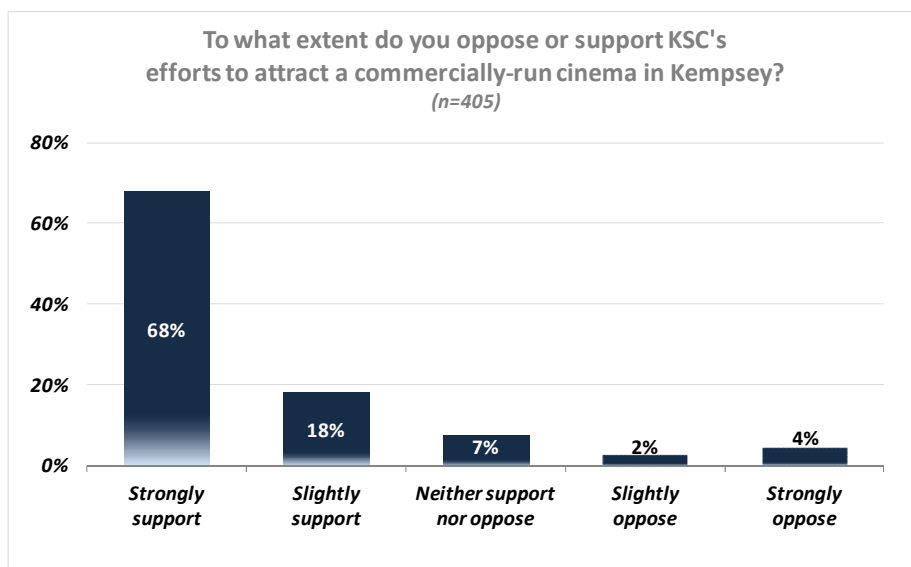
Women were particularly keen, with 86 per cent saying the cinema was very or quite important. Results were consistent by age, rural/urban, whether the respondent had children at home, and postcode.

Respondents were then told that: *“Council has undertaken research which indicates a cinema would bring jobs, activity and dollars to the town, and provide the opportunity for quality entertainment without having to travel long distances.”*

They were then asked to what extent they supported or opposed Kempsey Shire Council’s efforts to attract a commercially-run cinema in Kempsey. The results are shown in Graph 3.2, next page.



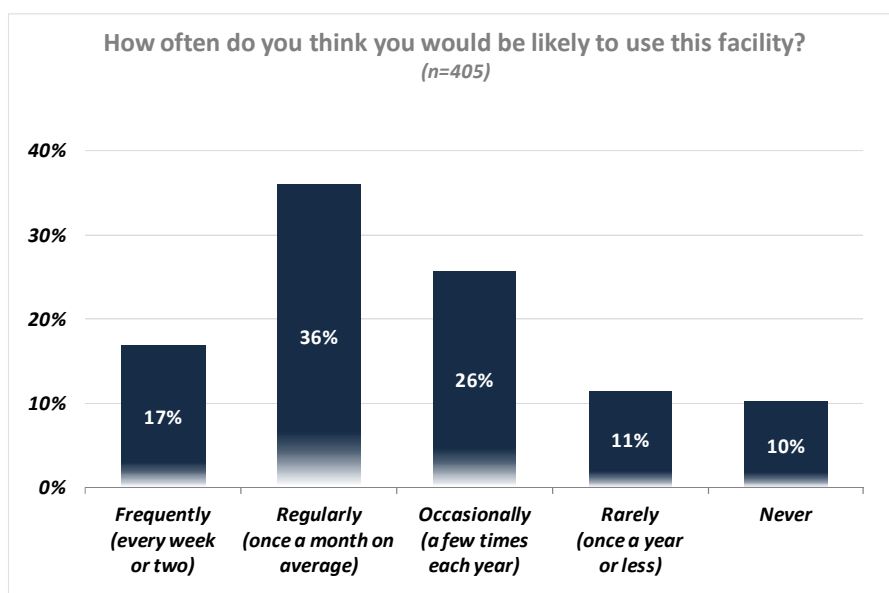
Graph 3.2: To what extent do you support or oppose Kempsey Shire Council’s efforts to attract a commercially-run cinema in Kempsey?



Again the response was positive: over two-thirds of those polled were strongly supportive of Council’s efforts, and a further 18 per cent were slightly supportive. Just as tellingly, only 6 per cent were opposed.

Women were significantly more likely to be strongly supportive than men (at 76 and 60 per cent respectively). Support was consistent across all other demographic groups – including by postcode.

Graph 3.3: If Council was able to attract a commercial cinema into central Kempsey, how often do you think you would be likely to use this facility?



When asked how often they thought they would use the new facility (from one of five prompted options), 17 per cent claimed they would do so frequently – defined as every week or two. A further 36 per cent felt they would go to the cinema once a month on average, and 26 per cent believed they would do so “occasionally” (defined as a few times each year). Only 21 per cent felt they would rarely or never attend a local cinema.

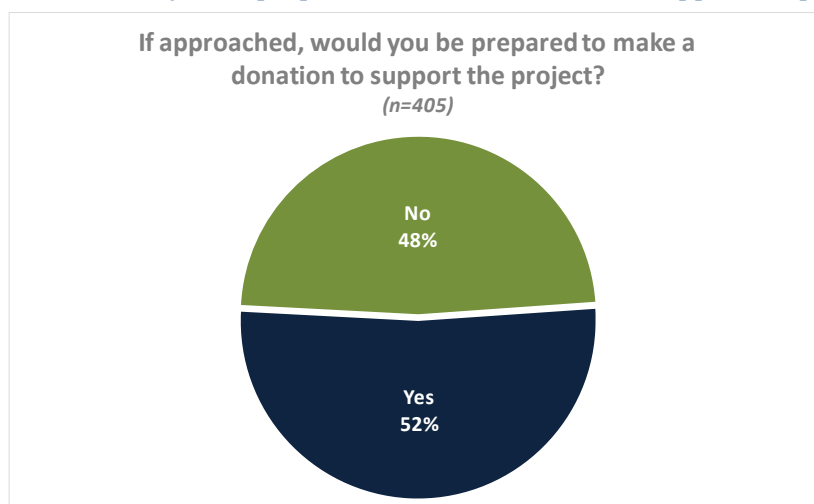
Visitation intent was strongest among younger residents (with 65 per cent of those aged 18-39 saying they were likely to go to the cinema frequently or regularly, against 41 per cent of those aged 60-plus). Likewise, 67 per cent of those respondents with children at home and 62 per cent of those living in Kempsey claimed they would use the cinema once a month or more.

Of those already classing themselves as moviegoers (Graph 2.2), 71 per cent said they would visit a cinema frequently or regularly.

Nearing the end of the survey, respondents were told that: ***“A modern multi-screen cinema would cost approximately \$5 million to build. Council is currently applying for federal funding to help meet this cost, and a financial contribution will also be made by the cinema company. Council also has a budget for investing in community assets that could be drawn upon. To strengthen Council's funding application, Council will also be seeking financial donations from local businesses and community members. All people or businesses who donate will be provided with a loyalty reward from the cinema.”***

They were then asked if they would be prepared to make a donation (of unspecified size) to support the project.

Graph 3.4: If approached, would you be prepared to make a donation to support the project?



Just over half of those polled said they would do so. Support for community donations was strongest among those aged 18-59 (at 58 per cent), rural residents (also 58 per cent), those with children at home (68 per cent) and those in the 2440 postcode (57 per cent). Among existing cinema-goers, 61 per cent said they would be prepared to make a donation.

Part 4: Other comments and suggestions

At the end of the survey, residents were asked if they had any final comments or suggestions in relation to the issues discussed in this survey. The vast majority of comments were positive, with many respondents pointing to the important social and economic benefits accruing from having a local cinema. In particular, there was a strong focus on; (a) the benefits to local youth having more to do, and (b) keeping spending local. Among the typical comments:

“We need something here for everyone because there is nothing here at the moment. A cinema will be good to keep kids off the streets and also good for older people in the area.”

“Would be good for town and young people, nothing for them to do at the moment.”

“Need something for the younger people to do, people 15-25 end up in Port Macquarie for entertainment and that is where they spend their money.”

“Just a really good one like they have at Port Macquarie and Coffs Harbour would be good for the kids it will keep them off the streets and give them something to do.”

“I think it would be great for the kids in Kempsey to have a cinema, as many parents cannot afford the petrol to take them to one of the cinemas out of town.”

“We severely need a cinema in Kempsey- the drive to Port is ridiculous. I enjoy movies a lot but it’s way too hard, a cinema would be great and it’s long, long overdue. If it’s built, people will come. Also bring jobs and good for kids.”

“I think it would be a great idea...I know so many people who go to Port Macquarie to see movies, and they spend money in Port instead of Kempsey.”

Among supporters, there was also some discussion about where the cinema should be located. Among the representative comments:

“It needs to be in a central place, possibly the showground. Somewhere with ample parking and also close to the police station. I think it would benefit the whole town.”

“It will be great and put it where the Bandbox used to be.”

“To be built in West Kempsey CBD.”

“There is already a cinema which could be renovated, this would save the council money to be spent elsewhere.”

“It would have to be situated somewhere safe in the city of Kempsey....well lit and secure.”



Of those opposed, the major issue related to the use of scarce Council money for this purpose. Among the typical comments:

“Waste of time and money. Spend the money on sporting grounds, swimming pool, and activities for the kids. The cinema would just go broke and cost the rate payers money to maintain it. , Why don't you improve the Bandbox?”

“While I can understand the benefit of a cinema there are more important aspects council should be focussing on, like fixing our roads.”

“Would prefer money to go to more sporting facilities.”

“The council should spend the money on other things...road works, sewerage...upgrade showgrounds....use money there.”

“I think it's a very good idea but I don't know if it is financially feasible. I think council could find better ways to spend their money, they have increased rates to cover roads I don't think they can afford a cinema.”

“Council should not spend money on a cinema because our roads are terrible and need mending. If the cinema was privately owned, that's fine.”

A full list of comments accompanies this report, for Council's consideration.



Appendix 1: Survey questionnaire

Version 1 Kempsey_Council

Last modified: 11/11/2014 2:06:52 PM

Q1. HI my name is (name), and I'm calling from Jetty Research on behalf of Kempsey Shire Council. We are currently conducting a short survey of residents regarding an important local issue. The survey takes only 5 minutes, and your responses would be confidential. Would you be willing to assist Council by completing a short research survey this afternoon?

Offer CALL BACK if inconvenient time. No call backs after Monday. Contact is Susannah Smith 6566 3122 Kempsey Shire Council

Yes	1
No	555

Q1

Answer If Attribute "No" from Q1 is SELECTED

2. Thank you for your time. Have a great afternoon/evening.

End

Q3. May I just have your first name for the survey?

Type NA if not willing to give name

Q3

Q4. Thanks so much [Q3]. To kick things off, which of the following activities have you done in the past six months?

PROMPTED

	Yes	No
Visited a local restaurant	1	555
Seen a concert or live show	1	555
Been to the cinema to see a movie	1	555
Visited an art gallery	1	555

Q4_1

Q4_2

Q4_3

Q4_4

Q5. How often would you typically visit a cinema? Would that be:

PROMPTED

Regularly (monthly or more)	1
Occasionally (a few times a year)	2
Rarely (once a year or less)	3
Never	4

Q5

Q6. And which cinemas would you visit often?

Do not answer If Attribute "Never" from Q5 is SELECTED

UNPROMPTED - tick any that apply

Port Macquarie	1
Nambucca	2
South West Rocks	3
OTHER	

Q6_1

Q6_2

Q6_3

Q6_0

Q7. When you go to see a movie, what types of other activities do you typically undertake?

Do not answer If Attribute "Never" from Q5 is SELECTED

UNPROMPTED - Tick any that apply. Specialty shopping includes fashion, homewares etc.

Shopping (groceries)	1
Shopping (specialty)	2
Visiting local attractions	3
Catching up with family/friends	4
Having a meal	5
OTHER	

Q7_1

Q7_2

Q7_3

Q7_4

Q7_5

Q7_0

Q8. To what extent do you agree or disagree with the following statements regarding why you don't go to the cinema more often? We'll use a scale of 1-5, where 1 means you strongly disagree, 3 is neutral and 5 means you strongly agree.

Answer If Attribute "Occasionally (a few times a year)" from Q5 is SELECTED OR

Answer If Attribute "Rarely (once a year or less)" from Q5 is SELECTED OR

Answer If Attribute "Never" from Q5 is SELECTED



PROMPTED rate each option. Check back on first answer to ensure correct scale.					
	1 Strongly disagree	2	3 Neutral	4	5 Strongly agree
I don't like going to the movies	1	2	3	4	5
I like going to the movies, but there hasn't been anything good on	1	2	3	4	5
I can't afford to go more often	1	2	3	4	5
It's inconvenient because we don't have a cinema in Kempsey	1	2	3	4	5

Q8_1
Q8_2
Q8_3
Q8_4

Q9. [Q3], the community has repeatedly told council that Kempsey needs a cinema. How important do you think it is for Kempsey to have a commercially operated cinema?

PROMPTED - read out options except unsure	
Very important	1
Quite important	2
Not very important	3
Not at all important	4
Unsure	666

Q9

Q10. Council has undertaken research which indicates a cinema would bring jobs, activity and dollars to the town, and provide the community with the opportunity for quality entertainment without having to travel long distances. To what extent do you support or oppose Kempsey Shire Council's efforts to attract a commercially-run cinema in Kempsey?

PROMPTED read out options	
Strongly support	1
Slightly support	2
Neither support nor oppose	3
Slightly oppose	4
Strongly oppose	5

Q10

Q11. And if Council was able to attract a commercial cinema into central Kempsey, how often do you think you would be likely to use this facility?

PROMPTED	
Frequently (every week or two)	1
Regularly (once a month on average)	2
Occasionally (a few times each year)	3
Rarely (once a year or less)	4
Never	5

Q11

