CINEMA FOR ALL

BRITISH FEDERATION OF FILM SOCIETIES
COMMUNITY EXHIBITOR SURVEY 2011/12

OCTOBER 2012

CONTENTS

KEY POINTS

Community exhibition is going from strength to strength in many parts of the country:

- Responding film societies and community cinemas recorded around 206,000 admissions in 2011/12. Theatrical ticket sales on this scale would have generated box office revenues of £1.2 million.
- Two fifths of community cinemas saw an increase in their annual admissions (41%), and 38% recorded roughly the same number.
- Three quarters (77%) of community cinema providers saw their membership stay the same or increase over the last year.
- Respondents operating a membership scheme had an average membership of 152, and we estimate that total membership stood at over 55,000 people across the UK.

Community cinema represents excellent value for money, especially to those on low or fixed incomes:

- The average full annual membership fee was £25.91, and 40% of respondents also offered full year concessionary membership fees (for senior citizens, students, under 21s or under 25s, the unemployed etc.).
- The average entry fee for members was £4.18 (£4.89 for non-members), which is lower than the average commercial cinema admission charge of £6.06 in 2011 (*BFI Statistical Yearbook 2012*).

Community cinema brings film, in all its diversity, to every part of the country:

- Respondents programmed over 600 titles in 2011/12, mainly British, foreign language and independent films.
    - One quarter (23%) of films screened in 2011/12 by film societies and community cinemas were British, and 28% were in a foreign language.
    - 14 titles were programmed by 10 or more community exhibitors during the year, and of these half were British in origin, three were US indie productions and four were foreign language titles.
    - The top three most programmed titles were *Of Gods and Men* (dir: Xavier Beauvois, 2010), *The Illusionist* (dir: Sylvain Chomet, 2010) and *Made in Dagenham* (Dir: Nigel Cole, 2010).

- Community exhibitors enhance film provision in areas otherwise neglected by commercial cinemas:
    - 42% operated in rural areas (compared with 3% of commercial screens).
    - On average, film societies and community cinemas were located around 9 miles away from the nearest commercial cinema.
    - Four fifths (81%) of community cinemas allow non-members to attend their screenings, bringing the best of world cinema to a wider audience.

Community cinema enhances the big screen experience with social and educational activities:

- Over half (54%) of all responding organisations held special events in addition to screenings. These included guest appearances by filmmakers to introduce films, quiz nights, film themed social events, special programmes to coincide with other organised events, talks, education events etc.
- 62% of responding organisations provided programming notes to accompany screenings.

Community cinema is run by the community, for the community, at the heart of the community:

- 93% are run as not-for-profit;
- 27% have charitable status;
- 18% provided training and professional development opportunities for volunteers or staff in 2011/12;
- 70% formally measure audience reactions to films in order to inform future programming decisions.

BFFS remains highly valued by members and users of its resources and services:

- Every service or resource was rated as ‘good’ or ‘very good’ by three fifths or more of respondents.
- Even the lowest ranked services and resources scored 2.2 out of 5.0 (1= very good, 5= very poor), which means on average they were positively valued.

Here is a selection of comments from satisfied respondents:

“BFFS is our first and main port of call if we need advice”

“You are the best and essential organisation for community cinema”

“Good information targeted at world cinema. Support there if necessary - this is good to know!”

“BFFS remains very clearly the leading organisation, the first port of call, very helpful, supportive and approachable”

EXECUTIVE SUMMARY

Survey

- The questionnaire was sent out to all full, associate and affiliate BFFS members and other community cinema organisations on the BFFS mailing list (609 in total). 158 organisations responded to the survey, a response rate of 26%.
- The pattern of survey responses across the UK broadly mirrored that of the survey population as a whole.

Year of establishment

- Six out of ten (61%) responding organisations were established in 2000 or later, while a significant proportion (16%) were established in the 1960s or earlier.

Websites and email

- Most respondents have an online presence: 88% gave a website address, while a larger proportion (99%) supplied an email address.

Membership

- Three quarters of the community exhibitors that responded (74%) operated a membership system in 2011/12 and the average membership size was 152.
- The membership of responding exhibitors stood at 14,912. If extrapolated to all BFFS members this would yield a sum total membership of over 55,000.
- 77% of respondents saw their membership rise or stay the same in 2011/12 and 23% saw a decline in numbers.
- The average full annual membership fee was £25.91.
- 40% of the responding exhibitors also offered full year concessionary membership fees (for senior citizens, students, under 21s or under 25s, the unemployed etc.).
- 29% of respondents that operated a membership system charged an additional admission fee, which averaged £4.18 in 2011/12.
- A sizeable minority of respondents offered season tickets (27%). Season ticket charges ranged from £2.40 to £180.00, and the average number of season ticket holders stood at 75 in 2011/12.

Admissions and key demographics

- The average admission fee on the door was £4.89 for non-members (median = £5.00), which is lower than the average cinema admission charge of £6.06 in 2011 (BFI Statistical Yearbook 2012).
- The average audience size in 2011/12 was 66.
- Over half (59%) of the responding organisations had an average of 60 or fewer audience members per screening. 7% had over 121 audience members on average.
- The largest audience recorded stood at 390.
- The sum total of all admissions from responding organisations was 206,356 for 2011/12. Putting this in perspective, theatrical ticket sales on this scale would have generated gross box office receipts of around £1.2 million pounds (206,000 multiplied by £6.06 [the average ticket price in 2011] = £1,248,360).
- Nearly four fifths (79%) of respondents recorded a rise in annual admissions in 2011/12 or saw them remain at the same level, while 21% recorded a fall over the year.

Provision

- The most commonly used format was DVD (used 'usually' or 'sometimes' by 97% of responding organisations).
- However, 2011/12 witnessed a strong shift towards the use of Blu-ray. Whereas nearly half (49%) of respondents never used Blu-ray in 2010/11, this fell to 29% in 2011/12. Blu-ray was 'usually' screened by 26% of respondents (up from 22% in the previous year) while 45% 'sometimes' screened using Blu-ray (up from 29% in 2010/11).
- Over half of respondents (52%) have upgraded, or are planning to upgrade, their screening equipment to a 'High Definition' (HD) format.
- On average, respondents were located 9 miles from their nearest commercial cinema, in a range running from less than a mile to 120 miles.
- 58% operated in urban locations with 42% in rural areas (11% in remote rural locations more than 10 miles from a large settlement). In contrast only 3% of commercial cinema screens are located in rural areas according to the BFI[1].
- 94% screen films at least once a month or more.

Programming

- The responding organisations programmed a total of 600 different titles during the 2011/12 season.
- 23% of films screened were British in 2011/12, while 28% were films in a foreign language.
- 73% of titles were screened by only one film society, indicating the diversity of programming choices made by individual societies.
- Seven of the 14 films programmed by <u>ten or more respondents</u> in 2011/12 were British and four were in a foreign language.
- The three most programmed films were *Of Gods and Men* (2010), *The Illusionist* (2009) and *Made in Dagenham* (2009).
- The majority of respondents (62%) provided programming notes to accompany screenings, and 70% measured audience reaction to films.
- Just over half (54%) of all responding exhibitors held special events in addition to screenings in 2011/12, the same proportion as in previous years.

Administration

- Nearly all respondents were run as not-for-profit enterprises (93%) and 27% also had charitable status in 2011/12.

Type of exhibitor

- The majority (88%) of responding exhibitors described themselves as 'community film societies or cinemas'.

Training

- Almost one fifth (18%) of respondents provided training and development opportunities for volunteers or staff, in areas such as health & safety (including first aid), box office systems, attendance at BFFS and ICO events and workshops, fund raising, and projection.

Audience demographics

- The majority of respondents (82%) said they would be willing to take part in a one-off, confidential audience survey, passing the information to BFFS for analysis.

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[1] *BFI Statistical Yearbook 2012*

Issues affecting community exhibitors

- The most common challenges facing community cinema providers remain linked to the need to attract members, volunteers and audiences.
- Community exhibitors, especially those who screen on 35mm, are experiencing some of the challenges posed by the transition to digital projection (including the dwindling number of 35mm prints in circulation). One way to meet the challenge is to upgrade to fully digital equipment, but many respondents affected said they do not have the funding to pursue this option.

Customer satisfaction

- The BFFS website and the e-Newsletter were the most frequently used of BFFS services and resources. 92% of respondents had used the BFFS website at some time, and 27% used it once a month or more. 76% had used the e-Newsletter (28% once a month or more).
- There was a high level of satisfaction with BFFS services and resources. Every service or resource was rated as good or very good by 59% or more of the respondents (and many by much more than this).
- The National conference (54% very good, 36% good), Film Society of the Year event (42% very good, 45% good) and regional viewing services (43% very good, 39% good) achieved the most positive ratings.

Additional support services

- Respondents expressed most interest in additional support from BFFS for PR/marketing (49%) and funding advice (48%), and there was least interest in programming support from BFFS (35%).
- When asked whether respondents would be willing to pay reasonable fees for such additional services, two fifths (38%) said they would be willing to pay for training, but only one in five (20%) would consider paying for programming support.

1 INTRODUCTION

1.1 Background

The British Federation of Film Societies (BFFS) is the national organisation for the development, support and representation of film societies and community cinemas throughout the UK. After the closure of the UK Film Council, BFFS received funding through the BFI Transition Fund to ensure audiences throughout the UK continue to have access to the full range of British and international cinema.

This seventh annual survey describes in detail the nature of community cinema activity for the benefit of BFFS, its members (and other users of its services) and supporters.

Throughout the report comparisons have been made with the results of the last annual survey, published in December 2011 (and available on the BFFS web site). These must be treated with a degree of caution where real numbers are compared (as opposed to percentages) because different respondents participated in each survey.

1.2 Aims

The survey aims to provide BFFS, its membership, the wider sector, the British Film Institute and other stakeholders with detailed information about the current make up and operation of film societies and community cinemas.

As in previous years the survey included questions about how groups are organised and what services they offer. We also repeated previous years' questions about organisations' satisfaction with BFFS services, to keep in step with what is needed on the ground.

1.3 Timescale

The questionnaire was designed and administered in May 2012, and analysis and reporting took place in September and October 2012.

1.4 Sector

Community Cinema is defined as any volunteer-led and non-profit-making organisation that shows films in its local area. This includes: film societies and clubs in communities and neighbourhoods, schools, colleges and universities; screenings in village halls, arts centres, cinemas, youth and community centres; mobile cinemas; and local film festivals.

2 METHODS

2.1 Introduction

The survey was hosted on the SurveyMonkey platform (www.surveymonkey.com) and a link to it was sent to all full, associate and affiliate members, plus other relevant organisations known to BFFS, in June 2012 (a total of 609 organisations). The survey was also flagged up in the BFFS newsletter *NewsReel.* Respondents were asked to complete the questionnaire by the middle of July, and reminders were sent to encourage a good response.

2.2 Responses

In total, 158 organisations responded to the survey, a response rate of 26%. Table 2.1 gives the number of survey responses from each nation and region:

Table 2.1: Survey responses by nation and region

Nation/region	Number of responses	%	Region share of BFFS membership (%)
South West	31	33	25
South East	17	18	17
Scotland	9	10	12
North West	8	9	9
Yorkshire	8	9	9
East of England	6	6	5
London	2	2	5
Wales	2	2	6
East Midlands	5	5	3
West Midlands	4	4	3
North East	-	-	2
Northern Ireland	1	1	2
Total	**93**	**100***	**100**

** does not sum 100% due to rounding*
Not every respondent gave their nation/region or an address

The final column gives the proportion of all BFFS members (including affiliates and associates) in each nation/region, and this demonstrates that, as in previous years, the pattern of survey responses across the UK broadly mirrored that of the membership as a whole (albeit respondents from the South West were over-represented, while there were fewer respondents from London, Wales and the North East than expected).

3 RESULTS

3.1 Year of establishment

Six out of ten (61%) respondents were established in 2000 or later (44% since 2005) while a significant proportion (16%) were established in the 1960s or earlier (Table 3.1):

Table 3.1: Year of establishment

Decade	#	%
1920s	1	1
1930s	2	2
1940s	4	4
1950s	3	3
1960s	6	6
1970s	5	5
1980s	11	12
1990s	5	5
2000 to 2004	16	17
Since 2005	41	44
Total	**94**	**100**

 # = number of respondents

3.2 Websites and email

As was the case in previous surveys, the majority of respondents have an online presence: 88% of respondents gave a website address (up from, 76% in 2009, 81% in 2010 and 84% in 2011), while nearly all (99%) gave an email address.

3.3 Membership

Section one of the questionnaire asked respondents whether they operate a membership system, charge for admissions, and/or offer season tickets. It also asked organisations to supply the number of members or season ticket holders they had as of December 2011, alongside details of their fees.

3.3.1 Membership

Three quarters of community exhibitors that responded (74%) operated a membership system of some description in 2011/12.

The average (mean) membership size was 152 (median = 93), down from 162 in 2010/11. The smallest membership was nine and the largest was 2,800.

The total membership of all respondents stood at 14,912. If extrapolated to all societies known to BFFS this would yield a sum total membership of over 55,000 (assuming the membership of respondents is representative of that found across all organisations).

One fifth of respondents saw their membership fall over the course of the year (23%), while 77% had the same number of members or more in 2011/12 than the previous year.

3.3.2 Membership fees

The average full annual membership fee was £25.91, an increase from 2010/11 (when it stood at £23.50). The smallest fee was just £2.00 while the largest was £70.00. As shown in Table 3.2, just under half of responding societies (40%) had a membership fee of £20.00 or less, and 46% fell in the £21 to £40 range.

Table 3.2: Full membership fees

Full membership fee	#	%
£10 or less	23	23
£11 to £20	17	17
£21 to £30	30	31
£31 to £40	15	15
£41 to £50	8	8
£51+	5	5
Total	**98**	100

Total does not sum 100% due to rounding

40% of respondents who operated a membership scheme also offered full year concessionary membership fees (for senior citizens, students, under 21s or under 25s, the unemployed etc.).

Just under one third (29%) of organisations that operated a membership system charged an additional admission fee on the door for members. The mean entry fee for members was £4.18 (median = £4.00). The lowest additional entry fee charged by respondents was £2.00 and the highest was £7.50.

3.3.3 Season tickets

Around one quarter of respondents offered season tickets (27%), up from 17% in 2010/11. The mean cost of a season ticket was around £33, and charges ranged from £2.40 to £180. The average (mean) number of season ticket holders stood at 75 in 2011/12 (down from 100 in 2010/11; the median number was 67).

3.3.4 Entry prices

Three quarters (81%) of respondents allow members of the public (i.e. non-members) to attend any of their screenings (for a charge on the door).

The average admission fee on the door was £4.89 for non-members (median = £5.00), which is lower than the average cinema admission charge of £6.06 in 2011 (*BFI Statistical Yearbook 2012*). The lowest charge on the door was £2.50 and the highest was £9.50.

3.4 Admissions

This section looks at the size of audiences at screenings and total admissions.

3.4.1 Audience sizes in 2011/12

Respondents were asked to provide an average number of admissions per screening during the 2011/12 season. The mean audience size was 66 (median size = 55), slightly lower than in the previous year.

Table 3.3 shows that over half (59%) of respondents had an average of 60 or fewer audience members per screening (down from 58% in 2009/10) while 7% drew average audiences of 121+.

Table 3.3: Average audience sizes

Average audience size	#	%
30 or fewer	15	13
31 to 60	55	46
61 to 90	29	24
91 to 120	12	10
121+	8	7
Total	**119**	**100**

The largest audience achieved by a respondent stood at 390.

3.4.2 Total admissions in 2011/12

In 2011/12 the smallest recorded annual admissions stood at 9 while the largest figure was 37,740. The mean total annual admissions stood at 1,946 (median = 761), up from 1,570 the previous year. Two fifths of community cinemas saw an increase in their annual admissions (41%), and 38% recorded roughly the same number.

The sum total of all admissions from responding societies and community cinemas was 206,356 for 2011/12.

Theatrical ticket sales on this scale would have generated gross box office receipts of around £1.2 million (206,000 multiplied by £6.06 [the average ticket price in 2011] = £1,248,360).

Table 3.4 gives the pattern of total admissions by nation and region. It shows that the South East region accounted for around one third (30%) of the total annual admissions (this region accounted for 9% of total commercial cinema admissions in 2011 (source: *BFI Statistical Yearbook 2012*)).

In the case of the South West, which has a strong community cinema sector, the region accounted for 15% of total admissions, while it achieved only 2% of commercial cinema admissions in 2011 (source: *BFI Statistical Yearbook 2012*). This provides evidence that in many parts of the country community exhibitors enhance the provision of film in communities that are under served by commercial cinema.

Table 3.4: Total annual admissions by nation and region

Nation/region	Admissions	%
South East	56,551	30
West Midlands	41,494	22
South West	29,181	15
East Midlands	21,758	11
North West	13,544	7
Yorkshire	11,328	6
East of England	8299	4
Scotland	5,743	3
Wales	1,635	1
London	755	<1

Northern Ireland	420	<1
North East	No response	No response
Total	**190,708**	**100**

3.5 Provision

This section looks at the way community exhibitors deliver screenings: the format(s) they project/screen, their location and how often they screen films.

3.5.1 Screening format and equipment

Organisations were asked to indicate which formats they use to screen films.

The most commonly used format was DVD (used ‘usually’ or ‘sometimes’ by 97% of responding organisations; see Table 3.5).

However, 2011/12 saw a strong shift towards the use of Blu-ray. Whereas nearly half (49%) of respondents never used Blu-ray in 2010/11, this fell to 29% in 2011/12. Blu-ray was ‘usually’ screened by 26% of respondents, up from 22% in the previous year, while 45% ‘sometimes’ screened using Blu-ray (up from 29% in 2010/11).

New digital screening formats are becoming increasingly accessible to community cinema providers, and evidence indicates their use is growing, albeit slowly. 16% screened via digital cinema ‘usually’ or ‘sometimes’ in 2011/12 (up from 10% in 2010/11), and 10% ‘sometimes’ used online downloads/streaming.

5% still used VHS, and nearly one in five (18%) usually project in 35mm. 16mm projection was sometimes employed by just 5% of respondents.

Table 3.5: Projection format

Format	Usually %	Sometimes %	Never %	Total %
Blu-ray	26	45	29	100
DVD	71	26	3	100
VHS	-	5	95	100
Digital cinema	7	9	84	100
Online download/streaming	-	10	90	100
35mm	18	9	73	100
16mm	-	5	95	100

Figures may sum more than 100% due to rounding.

As in the previous year, we asked respondents whether they have upgraded, or are planning to upgrade, their screening equipment to a 'High Definition' (HD) format (e.g. Blu-ray, D-Cinema projection, DCI-compliant digital). Over half (52%) of those who responded said they had upgraded, or planned to do so in future (up from 47% in 2010/11).

3.5.2 Location

The average distance between an organisation's primary venue and the nearest commercial cinema was 9 miles (median = 6.5 miles), within a range running from less than a mile to 120 miles. Almost two fifths (38%) were ten or more miles away from the nearest commercial cinema while 19% were within a mile or less of the nearest.

As in previous years, respondents were asked to classify the area they operate in as urban (town or city), rural or remote rural. Table 3.6 reveals that 58% of community cinema providers operated in urban locations (mainly towns) with 42% in rural areas (11% in remote rural locations more than 10 miles from a large settlement). Film societies and community cinemas play a vital role in bringing film to rural and remote communities, as only 3% of commercial cinema screens are found in rural areas (*BFI Statistical Yearbook 2012*).

Table 3.6: Urban/rural location, all respondents

Location type	#	%
Urban - town	52	43
Rural	38	31
Urban - city	18	15
Rural remote	13	11
Total	**121**	**100**

3.5.3 Screening frequency

Respondents were asked how frequently they screen films. Nearly half (45%) of respondents screened films once a month and 35% did so 2-3 times a month (Table 3.7).

Table 3.7: How often do you screen films?

Frequency	#	%
Once a week or more	17	14
2-3 times a month	42	35
Once a month	54	45
Less than once a month	7	6
Total	**120**	**100**

3.6 Programming

Respondents programmed a total of 600 different titles across 3,604 screenings during the 2011/12 season, up from 528 in 2010/11 (the full list of titles is given in Appendix 1).

This section looks at what types of films were screened, the most frequently programmed titles and at other types of events hosted by community exhibitors.

3.6.1 Types of film

The survey asked respondents to indicate how many films of a particular type were screened during their 2011/12 season, and the results appear in Table 3.8:

Table 3.8: Programming, 2010/11 and 2011/12

Type of film	Number of screenings 2010/11	% of all screenings 2010/11	Number of screenings 2011/12	% of all screenings 2011/12
British	581	26	845	23
Foreign Language	610	27	1,022	28
Documentary	79	3	191	5
Shorts	154	7	180	5
Archive films	68	3	65	2
Films made before 2000	369	16	328	9
BFFS Booking Scheme	104	5	137	4
Alternative content (e.g. theatre, concerts)	-	-	16	<1

Note: Percentages do not sum to 100% because films can appear in more than one category (e.g. films made before 2000 and foreign language).

One quarter (23%) of films screened in 2011/12 by community exhibitors were British, and 28% were in a foreign language.

Alternative content (which includes live events like stage productions, opera and major sports events delivered via satellite, as well as pre-recorded theatre and music concerts delivered on Blu-ray) is increasingly available to community cinemas. In the last year respondents hosted 16 alternative content screenings, and this is expected to increase over time as exhibitors diversify their programme to satisfy demand for non-film, big screen experiences.

3.6.2 Most frequently programmed films

Seven out of ten (73%) titles were screened by only one respondent (up from 70% the year before), indicating the diversity of programming choices made by individual exhibitors. However, a number of titles proved popular choices: 14 films were programmed by ten or more respondents (listed in Table 3.9).

As expected, films released within the last two years dominate this list. Seven of the 14 films programmed by ten or more exhibitors were British (using the BFI's country of origin definition), and four were in a foreign language. The three most programmed films were *Of Gods and Men* (2010), *The Illusionist* (2009*)* and *Made in Dagenham* (2009).

Table 3.9: Films programmed by ten or more organisations in 2011/12

Rank	Title	Country	Year	Programmings
1	Of Gods and Men	Fra	2010	27
2	The Illusionist	UK/Fra	2010	18
3	Made in Dagenham	UK	2010	17
4	The King's Speech	UK	2010	16
5	The Secret in Their Eyes	Arg/Spa	2009	15
6=	Submarine	UK	2010	14
6=	True Grit	USA	2010	14
7	Winter's Bone	USA	2010	13
8=	Oranges and Sunshine	UK/Aus	2010	12
8=	Potiche	Fra	2010	12
9=	Another Year	UK	2010	11
9=	My Afternoon With Margueritte	Fra	2010	11
9=	Tinker Tailor Soldier Spy	UK	2011	11
10	Black Swan	USA	2010	10

3.6.3 Number of screenings in 2011/12

The average number of screenings held in 2011/12 was 31 (median = 15), although there was some variation: one community exhibitor held only one screening during the period, and another hosted 720. Seven out of ten respondents (71%) held 20 or fewer screenings in 2011/12, while 8% held 51 or more (Table 3.10).

Table 3.10: Number of screenings

Number of screenings	#	%
10 or fewer	27	23
11 to 20	56	48
21 to 30	17	15
31 to 40	3	3
41 to 50	5	4
51+	9	8
TOTAL	**117**	**100**

3.6.4 Special events

Just over half (54%) of all responding community exhibitors held special events in addition to screenings in 2011/12, the same proportion as in previous years. These included guest appearances by filmmakers to introduce films, musical events, screenings accompanied by a meal, quiz nights, film themed social events, special programmes to coincide with other organised events such as literary festivals, talks, education events and such like.

3.6.6 Programming notes

The majority of respondents (62%) provided programming notes to accompany screenings, down from 68% in 2010/11.

3.6.7 Audience reaction

Respondents were also asked whether they measure audience reaction to the films screened, and 70% did so (down from 74% last year). By finding out what audiences enjoy, such information is helpful for informing future programming decisions, and 96% of respondents who measured audience reactions used audience reaction data for this purpose.

3.7 Administration

Film societies and community cinemas were asked whether they had charitable status and if they were run as a not-for-profit enterprise. Nearly all respondents are run as not-for-profit (93%) and 27% also have charitable status (these results differ little from those reported in previous surveys).

3.7.1 Type of organisation

The majority (88%) of respondents described themselves as a community film society or cinema.

Table 3.11: Type of organisation

Type	#	%
Community film society/cinema	94	88
University or college film society	2	2
Arts Centre	3	3
Pop up screening	3	3
Other	5	5
Total	**107**	**100**

3.7.2 Training

For the first time in the annual survey, we asked community cinema providers whether their volunteers or staff undertook any training or professional development in 2011/12. Almost one fifth (18%) of respondents provided training and development opportunities, in areas such as health & safety (including first aid), box office systems, attendance at BFFS and ICO events and workshops, fund raising, and projection.

3.7.3 Audience demographics

BFFS used to collect estimates of the demographic composition of membership and audiences from survey respondents, but the question was dropped in 2008/09 because it was time consuming to complete and liable to yield inaccurate results.

But as it would be useful to know the demographic make up of audiences (by age, gender, ethnicity and disability) to gauge how inclusive and accessible the sector is, we asked respondents if they would be willing to participate in a one-off, confidential audience survey, passing the information to BFFS for analysis.

The majority of respondents (82%) said they would be willing to take part in such an exercise, and we will set out our plans for the audience survey next year.

3.7.4 Issues affecting community exhibitors

For the fourth year running we asked respondents to describe the most important issues currently affecting their organisation and its successful operation and development. 97 respondents replied to the question, and a summary of responses is given in Table 3.12.

As in previous years, the most common challenges facing community cinema providers were linked to the need to attract members, volunteers and audiences. Without healthy and sustained levels of participation such community groups risk financial problems that can lead to a downward spiral as membership and audiences dwindle further.

In addition, community exhibitors, especially those who screen on 35mm, are experiencing some of the challenges posed by the transition to digital projection (including the dwindling number of 35mm prints in circulation). One way to meet the challenge is to upgrade to fully digital equipment, but many respondents affected said they do not have the funding to pursue this option.

As was the case last year, respondents cited high venue and film hire costs and the wider economic downturn as contributory factors to their present problems.

Table 3.12: Most pressing issues affecting respondents

Category	Specific issue
Membership and audiences	• Maintaining and growing membership. • Need to increase audience size to make it financially viable. • Competition with other local exhibitors. • Ageing audience and membership.
Committee and volunteers	• Recruiting volunteers and committee members.
Film booking and programming	• Lack of available 35mm prints. • Distributors not holding onto copies of DCPs. • Hire costs of films on 35mm and DVD/ Blu-ray. • Identifying rights holders. • Sourcing DVDs in early release window. • Encouraging audiences to watch subtitled films.
Venue and equipment	• Cost of existing venue hire. • Sound equipment needs replacing/ upgrading. • Projection equipment needs updating. • Securing funds to purchase own equipment. • Public sector cuts affecting venue. • Poor seating in venue.
Finances	• Economic downturn is affecting people's spending. • Securing funding from film bodies affected by cuts (e.g. regional screen agencies)

3.8 Using BFFS services and resources

Since 2007/08 the survey has included a selection of 'customer satisfaction' questions to gauge how often film societies and community cinemas use BFFS services and how satisfied they are with them.

To begin with, respondents were asked how frequently (if at all) they use particular services and resources. Table 3.13 shows that the BFFS web site and the e-Newsletter were the most frequently used of the services and resources listed. 92% of respondents had used the BFFS web site at some time, and 27% used it once a month or more. 76% had used the e-Newsletter, and 28% used it once a month or more.

Table 3.13: How frequently do you make use of the following BFFS resources and services?

Services/resources	% Once a month or more	% Once every 2 to 3 months	% Once every 6 months	% Once a year or less	% Never
BFFS website (base=103)	27	38	16	12	8
e-Newsletter (base=98)	28	34	8	6	24
Advice leaflets & briefing notes (base=76)	4	9	15	30	43
Regional group services (base=84)	2	7	21	25	46
BFFS Booking Scheme (base=82)	5	13	17	20	46
Community Cinema Sourcebook (base=83)	2	8	17	17	56
BFFS Programming notes	-	6	14	15	64

Base= the number of respondents answering the question.
Figures may not sum 100% due to rounding.

3.9 Rating BFFS services and resources

Respondents were also asked to rate on a 5-point scale the BFFS services and resources they had used in the last year. As in 2010/11, Table 3.14 and Figure 3.1 reveal a high level of satisfaction with the majority of BFFS services and resources, a point further illustrated by the comments from respondents provided in Appendix 2.

All but one service or resource was rated as good or very good by 70% or more of the respondents with the National conference and Film Society of the Year event scoring the highest satisfaction ratings (see Figure 3.1).

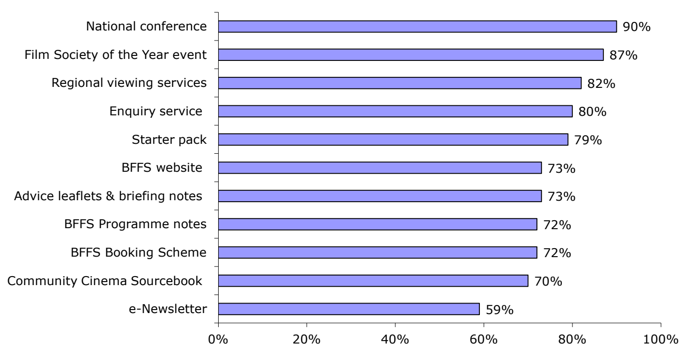
The mean rating value gives an indication of the overall ranking of services and resources based on their scores: the lower the value the more positive the rating. Significantly, even the lowest ranked services and resources scored 2.2, which means on average they were positively valued.

Table 3.14: How do you rate the following BFFS resources and services?

	Mean rating	% V Good 1	% Good 2	% Okay 3	% Poor 4	% V Poor 5
Enquiry service (base=51)	1.7	53	27	20	-	-
Regional viewing services (base=54)	1.8	43	39	15	2	2
BFFS Booking Scheme (base=54)	1.8	50	22	28	-	-
Community Cinema Sourcebook (base=49)	2.0	37	33	29	2	-
Starter pack (base=38)	1.8	37	42	21	-	-
Film Society of the Year event (base=33)	1.7	42	45	12	-	-
National conference (base=28)	1.6	54	36	11	-	-
Advice leaflets & briefing notes (base=43)	2.0	26	47	28	-	-
BFFS website (base=92)	2.0	24	49	26	1	-
e-Newsletter (base=79)	2.2	24	35	38	3	-
BFFS Programme notes (base=35)	2.1	26	46	26	-	3

Base= the number of respondents answering the question. % may not sum 100 due to rounding.

Figure 3.1: Percentage rating each service and resource 'Very good' or 'Good'



3.10 Additional support services

Respondents were asked whether they would like BFFS to provide additional support in a number of areas in future. Respondents expressed most interest in additional support for PR/marketing (49%) and funding advice (48%), and there was least interest in programming support from BFFS (35%):

Table 3.15: Would you like additional support from BFFS in these areas?

Additional support	#	% yes
PR/ marketing support	43	49
Funding advice	41	47
Equipment support	37	44
Training	33	38
Programming support	30	35

When asked whether respondents would be willing to pay reasonable fees for such additional services, two fifths (38%) said they would be willing to pay for training, but only one in five (20%) would consider paying for programming support:

Table 3.16: Would you be willing to pay additional, reasonable fees to receive BFFS support in these areas?

Additional support	#	% yes
Training	33	38
Equipment support	29	34
PR/ marketing support	25	30
Funding advice	23	27
Programming support	17	20

APPENDIX 1:

2011/12 FILM LIST

[REC]
127 Hours
24 City
Abel
The Adjustment Bureau
The Adventures of Prince Achmed
Africa United
The African Queen
Afternoons with Margerite
Aftershock
Ajami
Akeelah and the Bee
Alamar
Alice in Wonderland
Alien
Aliens in the Attic
All About Eve
Amelie
The American
Angels of Evil
Animal Farm
Animal Kingdom
Annie Get Your Gun
Anonymous
Another Year
Anvil 'The Story of Anvil'
Anything for Her
Arbor, The
Archipelago
Aristocats
Arna's Children
Arthur
Article 12
The Artist
Atash
Atonement
Attack the Block
Attenberg
Azur and Asmar
Babycall
Bal
The Ballroom
The Band's Visit
Baraka
Barney's Version
Beautiful Lies
Being Julia
Belleville Rendez-Vous
Benda Bilili!
A Better Life
The Bicycle Thieves
The Big Chill
The Big Picture
The Big Sleep
Bird
Biutiful
Black Power Mixtape: 1968-1975
Black Swan
Blackmail
Blank City
Blood and Rain
Blood in the Mobile
Blue Valentine
Bluebeard
Boomerang
Booth Story
The Bothersome Man
A Boy and His Dog
The Boy Mir (short)
Bread and Tulips
Breaking Away
Breathless
Bridesmaids
The Bridges of Madison County
Bright Star
Brighton Rock
The British Guide to Showing Off
The Bucket List
Budrus
Buena Vista Social Club
The Burial
Burke & Hare
Cactus Flower
Captain America
Casablanca
The Castle
Cat on a Hot Tin Roof
Cat People (1942)
Cave of Forgotten Dreams
Central do Brasil
Central Station
Certified Copy
Chalet Girl
Cherry Blossoms
Chestnut, Hero of Central Park
Chico & Rita
Children of the Revolution
Chinatown
Chocolat
A Christmas Story
Cinema Paradiso
Circo
The Circus
City of Life and Death
Cloudy With a Chance of Meatballs
The Coca Cola Case
Coco Avant Chanel
Colossal Youth
Coming to America
The Commitments
The Concert
The Conformist
The Consequences of Love
Conversations With My Gardener
Coraline
Countdown to Zero
The Counterfeiters
Cowboys and Aliens
Crazy Stupid Love
The Dark Crystal
Dawn Treader
Death in Venice
The Debt
Defeat of the Champion
Defence of the Realm
Departures
District 9
Do the Right Thing
Donnie Darko
Dostana
Dreams of a Life
Drive
Due Date
Eagle vs Shark
The Eagle
Eccentricities of a Blonde-Haired Girl
The Economics Of Happiness
Eden New Park (short)
Educating Rita
An Education
Eleanor's Secret
Electra Glide in Blue
Emma
The Empire Strikes Back
England Made Me
Ernest Saves Christmas
Everlasting Moments

The Extraordinary Advertures of Adele Blanc-Sec
Eyes Wide Open
Fair Game
Fanny and Alexandra
Farewell
Fargo
The Farmer and the Horse
Father of My Children
Father of the Bride (1950)
The Fighter
A Fine Wine (short)
The First Day Of The Rest Of Your Life
The First Grader
Fish Story
Fish Tank
Five Easy Pieces
Flame and Citron
Fog, The
Four Days Inside Guantanamo
Four Lions
French Cancan
Fugitive Pieces
Gainsbourg
Garbage Warrior
The Garden of the Finzi-Contini
The General
Genevieve
Gentlemen Prefer Blondes
Get Low
G-Force
The Ghost and Mrs Muir
The Ghost
The Girl Who Kicked the Hornet's Nest
The Girl Who Played With Fire
The Girl with a Dragon Tattoo
The Gleaners and I
Gnomeo & Juliet
God Diggers of 1933
Gold Rush & Sons of the Desert
Gone With the Wind
Goodbye Lenin!
Goodnight and Goodluck
The Goonies
Gospel According to St. Matthew
Gran Torino
Grand Voyage
The Great White Silence
The Green Wave
The Green Zone
The Grocer's Son
The Guard
Gulliver's Travels
Gun Crazy
Hallam Foe
Hanna
Hannah
The Happiest Girl in the World
Happy
Happy Slap (short)
Happy Together
Hard Days' Night
Harold and Maude
Harry Potter & The Deathly Hallows-pt 2
Harry Potter & The Deathly Hallows-pt 1
Hawk
Heartbreaker
The Hedgehog
Hell and Back Again
The Help
Hidden Herstories
The Holiday
The Holly and the Ivy
Home Alone
Horrid Henry
How I Ended the Summer
Hue and Cry
Hugo
The Hunger Games
Hunted
The Hunter
I am Love
I Was Born, But…
I Will Follow
The Ides Of March
The Illusionist
In a Better World
In Darkness
In the Mood for Love
In the Name of the Father
In Transition 2.0
Incendies
Inception
The Incredibles
An Independent Mind
Injustice
Inside Job
The Interrupters
Into the West
Invictus
The Iron Lady
It Happened One Night
The Italian Job
It's A Gift
Its a Wonderful Life
Ivan the Terrible
Jack Cardiff- Filmmaker
Jackie Brown
Jane Eyre
Japanese Story
Jar City
Jean de Florette
Jindabyne
John Rabe
Johnny English Reborn
Journey of the Universe
Jubilee
Julia Turtles Can Fly
Julie & Julia
The Jungle Book
Junkhearts
Just Do It
Katalina Varga
Kick Ass
The Kids Are Alright
Killing Kasztner
Kind Hearts and Coronets
The King's Speech
Kings of the Road
Kinky Boots
Kirikou and the Sorceress
Kung Fu Panda 2
L'Herisson
La Cabina (short)
La Vie en Rose
Labou and the Quest for the Lost Treasure
Labyr
The Lady Vanishes
The Lady
The Ladykillers
Larry Crowne
Lars and the Real Girl
The Last Metro
The Last of England
The Last of the Blonde Bombshells
The Last Picture Show
Laurel and Hardy shorts
Le Concert
Le Quatro Volte
Leaving
Lemon Tree
L'Enfant Sauvage
Les Choristes
Les Diaboliques
Let the Right One In
Letter to Brezhnev
Life Above All
Life During Wartime
Life Goes On
Life In A Day
The Life Thief
The Lighthouse

The Lincoln Lawyer
Lion King
Little Malcolm
Little White Lies
Liverpool
The Lives Of Others
London River
Lone Star
Lonesome East (short)
Looking For Eric
Loose Cannons
Los Bastardos
Louise Michel
Lourdes
Love at First Sight (short)
Love Like Poison
Made in Dagenham
The Magic Flute
Maid, The
Mamma Mia
Mammuth
Man in the Chair
The Man Who Planted Trees (short)
Manon des Sources
Mao’s Last Dancer
Margiana
Mary and Max
Mathilda
A Matter of Life and Death
Me and My Sister
Me and Orson Welles
Mean Streets
Meek’s Cutoff
Meet Me in St Louis
Melancholia
Metropolis
Micmacs
Mid-August Lunch
Midnight Cowboy
Midnight in Paris
Mildred Pierce
Miracle on 34th Street
The Misfits Curse of the Were Rabbit (short)
The Misfits
Mission: Unpossible (short)
Molly’s Way
Monsieur Hulot's Holiday
Monsoon Wedding
Monstors vs Aliens
Moomins and the Comet Chase
Moon
Morning Glory
Morris: A Life with Bells on
Mother
Motorcycle Diaries
Mr Popper's Penguins
MR73
Mselle Chambon
Muppets
My Afternoon with Margueritte
My Blueberyy Nights
My Dog Tulip
My Life as a Dog
My Name is Khan
My Week With Marilyn
The Namesake
Nanny McPhee
Neds
Never Let Me Go
The Next 3 Days
A Night at the Opera
Night of Truth, The
Night On Earth
Norwegian Wood
Nosferatu
Of Gods and Men
Of Mice and Men
The Official Story
Offside
Oh, Mr Porter
Oil City Confidential
On Tour
Once Upon a Time in the West
One Day
Opening Night
Oranges & Sunshine
Oranges and Lemons
An Ordinary Execution
Orphans
Orphee
OSS 117: Cairo, Nest of Spies
Our Day Will Come
Our Generation
Out of the Ashes
Out of the Past
Outfoxed
Outside the Law
Pan's Labyrinth
Paris, Texas
The Passion de Jeanne d'Arc
Patagonia
Paul
Pavee Ceilidh
Peeping Tom
Peepli Live
Perfect Blue
Perfect Sunday (short)
Pina
Pirates of the Caribbean: On Stranger Tides
Planeat
Planes Train and Automobiles
Planet 51
Poetry
Point Blank
Police, Adjective
Pomegranates and Myrhh
The Portuguese Nun
Position Among the Stars
Post Mortem
Potiche
Prairie Home Companion
Pray the Devil Back to Hell
The Princess Bride
The Princess of Montpensier
Priscilla Queen of the Desert
Proof
A Prophet
Purple Rain
Purple Rose of Cairo
Queen of the Sun
R: Hit First, Hit Hardest
The Rabbit Proof Fence
Rango
Rapt The Maid
Rare Exports: A Christmas Tale
Ratatouille
Rear Window
Red
The Red Balloon
The Red Balloon (short)
Red Riding Hood
Restrepo
Revanche
The Revolving Door (Short)
Richard III
Ring of Bright Water
Rio
Rise Of The Planet Of The Apes
Robinson in Ruins
Rocky Horror
Romantics Anonymous
A Room and a Half
Round Midnight
Route Irish
Ruth (short)
Safety Last
The Salt of Life
Samia
Samson and Deliliah
Santa Sangre
Sarah's Key
Saturday Night and Sunday Morning
Scarface
Schooling the World

The Searchers
The Secret Garden
The Secret in Their Eyes
The Secret Of Kells
Senna
A Sense of History (short)
Separado
A Separation
Seraphine
Shaun of the Dead
The Shawshank Redemption
The Shop Around the Corner
Singin' in the Rain
Skeletons
The Skin I Live In
Sky High
Smurfs
Snowtown
The Social Network
Solaris
Son of Babylon
Sound it Out
The Sound of Music
Source Code
The Spirit of the Beehive
Spy Kids
St Trinians 2
Stagecoach
Steam of Life
Still Walking
A Stitch In Time
Straight Story
Strictly Ballroom
Submarine
Sucker Punch
Sugar
Sunrise
Sunshine and Oranges
Super 8
Support Your Local Sheriff
Sweet Smell of Success
Sweetgrass
Tabloid
Take Shelter
Tamara Drewe
Tangled
A Taste of Honey
Tell No One
Tempes, The
Ten Thousand Pictures of You (short)
Tetro
The Thing
The Third Man
Three Colours Blue
Three Colours Red
Three Colours White
Time and Time Again
The Time Machine (short)
Time That Remains
Times and Winds
Tinker Tailor Soldier Spy
Tintin
Tomboy
Topsy-Turvy
Tortoise in Love
Touch of Evil
Touching the Void
A Town Called Panic
A Town Like Alice
The Town
Tracker
The Tree of Life
Tricks
True Grit
Tulpan
The Tunnel
Uncle Boonmee
Undertow
Unknown
Unpossible (short)
Unrelated
Unstoppable
Up
Up in the Air
A Useful Life
Vanishing Point
Vertigo
Videodrome
Vincere
The Visitor
Viva Riva!
War Horse
The War Zone
Warn no. 6
The Wasteland
Water
Water for Elephants
The Wave
The Way Back
Way of the Morris
Way, The
We Need to Talk About Kevin
Weekend
The Well-digger's Daughter
Went the Day Well
West is West
Whale Rider
Whatever Works
What's up Doc?
White Mane
White Material
The White Ribbon
Who's Afraid of Virginia Woolfe?
The Wild Hunt
Win Win
Wings of Desire
Winstanley
Winter’s Bone
The Wizard of Oz
Women Without Men
A Wonderful Life
Wrong Rosary
Xmen First Class
Yella
You Will Meet a Tall Dark Stranger
Young Adam
Young Hearts Run Free
Your Highness

APPENDIX 2:

COMPARING BFFS WITH OTHER ORGANISATIONS

How do we compare with other organisations that support community cinema?

34 respondents answered by stating they had no comparable experience of other organisations. A further 39 respondents offered the following comparisons:

All comments are verbatim

“BFFS is the only organisation that broadly and comprehensively supports community cinema”

“We only know of the ICO as the organisation that supports community cinemas. We attend their screenings and occasionally their courses. The latter are usually aimed at more 'professional' operations with paid staff. The annual BFFS Conference compares well with like for like occasions run by the ICO but being confined to one weekend in September limits ability to take it up.”

“BFFS remains very clearly the leading organisation, the first port of call, very helpful, supportive and approachable”

“BFFS is focused on the needs of this sector, so understands what we need and what is within our ability to deliver, while aspirational because we see what other groups are doing [best practice]. As a result, advice is relevant, fees/costs are proportional to the income of a not-for-profit, context is based on volunteer time/efforts. BFFS is in intimate contact with a wide-range of organisation like us, so the information and services provided are relevant and the network support invaluable. We like feeling part of a national network with a trusted organisation giving us a gentle 'steer'”

“Important resource to respond nationally to the needs and concerns of film societies and community groups as opposed to regional interest. A strong united voice”

“More community cinema focused”

“Don't know of any comparable organisations, but BFI and ICO have also been useful, in different ways to BFFS.”

“Very good”

“Very favourably”

“Compare very well. Always helpful.”

“BFFS is a good source of information - sometimes. We have had more immediate advice from the nearest independent cinema, whose staff have been very helpful in relation to our 'convert-to-digital' project.”

“Very well”

“Friendly and you understand the sector”

“Appear very supportive, though am unfamiliar with other organisations that support community cinema”

“We do not use your help directly but do appreciate your work”

“BFFS is like mother to our society and we are happy with the support we are receiving.”

“We don't see another organisation can compete with BFFS function and support.”

“Not used BFFS before but will do so in future”

“Only Know of ICO, and BFFS is a different and better organisation”

“Great!”

“BFFS is our first and main port of call if we need advice. Fife Council are useful for additional funding but do not really understand Community Cinema. Various web-sites and booking agencies do what they do but the internet interaction is always less than satisfactory. With BFFS I can talk to people I know will understand.”

“Very helpful and responsive”

“Don't use anything a great deal but find all to be as helpful as they can be.”

“Not used other, except ICO viewing session; prefer BFFS”

“Peerless”

“As a network you are excellent but obviously we have to compare you to Regional Screen Scotland which both provides financial support to us as well as offering training opportunities.”

“From my very limited experience, these are very London-centric (e.g BFI, Creative England / Beyond the Blockbuster conference) and not hands on in the way BFFS are”

“Very well”

“The local council has been helpful in providing small grants.”

"You're simply the best."

“Very good”

“Interesting question - other than the ICO and BFI I can't think of any others? ICO has been responsive when sent a query and we have booked archive film from them in the past. Andrew Youdell at BFI is always prompt and helpful. ICO is more about training and smaller cinemas? (but why do they have films to offer as well??) rather than the volunteer run community cinemas?- In fact, I forecast that ICO would probably replace BFFS but how wrong can you be!”

“I only know of the ICO who can be useful but BFFS more useful for Film Club enquiries.”

“You are the best. Professional/approachable/knowledgeable.”

“You are the best and essential organisation for community cinema”

“BFFS is normally the only organisation that we currently consider as supportive to our community cinema”

“Excellent”

“We work closely with the ICO so rely on them.”

“Good information targeted at world cinema. Support there if necessary - this is good to know!”

[end]