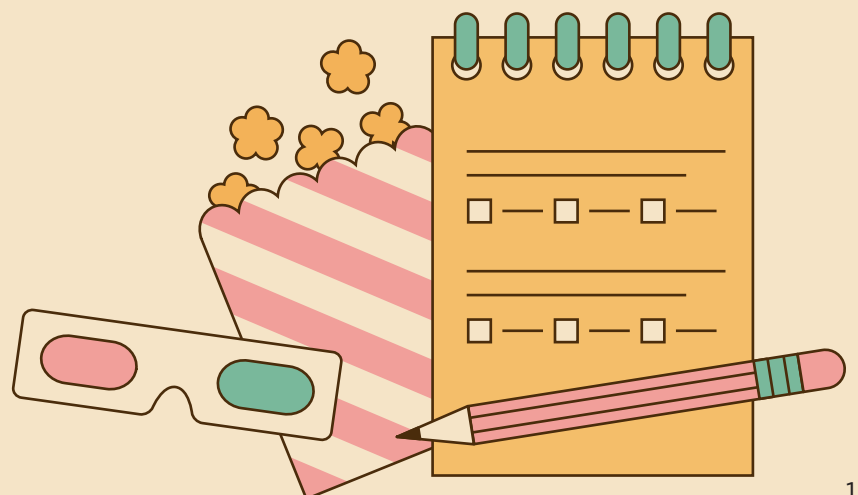


Community Exhibitor Survey



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Summary

Survey

The questionnaire was sent out to all full, associate and affiliate Cinema For All members and other community cinema organisations on the Cinema For All mailing list. 137 organisations responded to the survey.

Administration

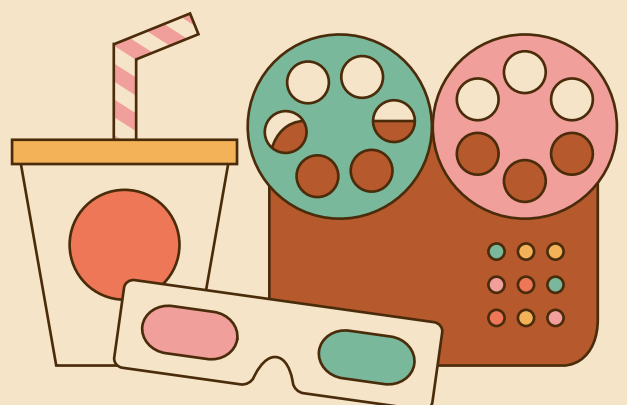
- 80% of respondents were established in the year 2000 or later.
- 82% of respondents describe themselves as a Community Cinema or Film Society.
- Community Cinemas and Film Societies were seen as different by 60% of respondents, with the main cited differences being in administration (open vs membership organisations) and programming.
- Staff or volunteers from just under two thirds (64%) of responding organisations attended an event aimed at film exhibitors.
- 18% of respondents had paid members of staff.
- Most respondents (80%) used just one venue for all of their screenings, and almost half (45%) of respondents' primary venues were village halls or community centres.
- Over a third (35%) of responding groups purchased equipment during the relevant period.

Audience, Membership and Admission

- The average audience size was 56, which is a decrease from 75 reported in both 2009 and 2014.
- Despite the lower average audience size, admissions seem to have risen; the average total number of admissions this year was 2,383, up from 1,360 in 2009 and 1,891 in 2014.
- Just 15% of groups reported a decrease in their audience size.
- Average adult ticket price was £6.04, which is over £1 lower than the average commercial ticket price of £7.11.
- Half of respondents offered a membership scheme - this is down from 87% ten years ago and 73% five years ago.
- 37% of respondents used collected data about their audience for evaluation or audience development purposes.
- Over half (60%) of respondents changed how they store or process audience data in light of GDPR legislation introduced in May 2018.

Provision

- On average respondents' nearest commercial cinema was 6 miles away.
- Over a quarter (28%) of responding groups were based in cities, which continues a dramatic upward trend seen over the last ten years.
- 84% of respondents felt they offered the community benefits of 'value for money' and 'broadening the range of films available locally'.



Programming

- The most common screening format is Blu-ray, with 90% of respondents usually or sometimes screening from it, in contrast to just 5% ten years ago.
- The mean number of screenings held by respondents was 29, and the most common frequency of screenings was between one and three times per month (72% of respondents).
- 24% of films screened were foreign language, and 21% were British.
- Of the 23 films which were screened by at least ten respondents, 61% were either British or in a foreign language.
- 853 different films were screened by the 96 respondents who provided their full programme details.
- Over two thirds (68%) of these were screened by just one respondent, showing how diverse community exhibitors' programmes are.
- 57% of respondents held a special event in addition to their screenings, including Q+As, guest speakers, immersive elements and live music.
- Over the last ten years there has been a slight decrease in the number of groups providing programme notes and collecting audience members' reaction scores to films.
- When asked what respondents felt their contribution to 'film culture' is, the most common theme in responses was increasing the range of films available locally, with a particular focus on foreign language titles.

Cinema For All

- Most respondents (88%) were either full, or associate members of Cinema For All.
- Newsreel and the Booking Scheme were the most used of Cinema For All's services.
- No Cinema For All services were rated 'very poor' by any respondents.
- The Launchpad and Sustain coaching schemes were the highest rated services, closely followed by the Starter Pack and the Community Cinema Conference.
- The most cited value of Cinema For All was the advice and support available either on the phone, or over email, with many respondents specifically pointing out the helpful, friendly and approachable nature of the team.
- 90% of respondents saw Cinema For All as an organisation that represents the interests of community exhibitors on a national level.

The Sector

- The most cited challenges faced by respondents were finances, audience size, and programming.
- The most common achievements of respondents were increasing audience numbers, and recognition (either from their audience/community, or through awards).
- 27% of respondents were concerned about maintaining active volunteers to keep their cinemas running.
- Half of respondents believed the somewhat elusive concept of 'cinema for all' was a mix of access, a range of films and representation on screen.

Introduction

Background

Cinema For All (the trading name of the British Federation of Film Societies) is the national support and development organisation representing film societies and community cinemas in the UK. Cinema For All raises income, including funding from the BFI, to ensure audiences throughout the UK continue to have access to a wide range of independent, British and world cinema.

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

Aims

The survey aims to provide Cinema For All, 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 in the UK.

As in previous years the survey includes questions about how groups are organised and what services they offer. We have also repeated previous years' questions about organisations' satisfaction with Cinema For All services in order to keep up to date with what the sector is looking for from a national support organisation.

This year we have included, where possible, comparisons data over the last ten years, in order to identify any trends and changes within the sector.

Timescale

The questionnaire was designed and administered between May and August 2019, and analysis and reporting took place in January and February 2020. Respondents answered questions based on their organisations' activities between September 2018 and August 2019.

Sector

The term 'community exhibitors' is used to describe the full range of organisations served by Cinema For All, which may be volunteer-run or employ some staff, not-for-profit or commercial enterprises. It includes community cinemas and film societies, student film clubs, mobile screening networks, pop-up screenings, independent cinemas with a community remit, arts centres/ theatres operating part-time screens and local film festivals. Findings reported here relate to all community exhibitor respondents unless stated otherwise.

Methods

The survey was hosted on the [SurveyMonkey](#) platform and a link to it was sent to all full, associate and affiliate members, plus other relevant organisations known to Cinema For All, in spring 2018. The survey was also publicised in the Cinema For All newsletter and on social media. Respondents were asked to complete the questionnaire by the middle of August, and reminders were sent to encourage a good response. By August 2018 when the survey closed, 137 organisations had responded.

Results

Administration

Ages of Organisations

The Film Society movement has been going for almost a century and shows no sign of slowing down. As Table 1 (page 6) shows, over three quarters (80%) of responding groups have been established since the year 2000. This follows the upward trend seen in the Exhibitor Survey from ten and five years ago; in 2009 the figure was 55% and in 2014 it was 66%.) Historically there have always been a significant number of long-running groups; in 2009 11% of respondents were established before 1960, and in 2014 the figure was 12%. This year, however, the figure fell to 7%.

Types of Organisations

Respondents were asked how they describe their type of organisation. Chart 1 (page 6) shows the responses. The most common answer was Community Cinema or Film Society, with 82% of respondents choosing this option. 3% of respondents were independent cinemas, another 3% were film festivals, and just 2% were student cinemas. The remaining 11% selected the 'Other' option, and responses included 'Development education centre' and 'Community library'.

With no official definitions of the terms 'community cinema' and 'film society', there has been considerable debate within the sector over whether there is a difference between the two, and if so, what that difference is. Respondents were asked this year for the first time, and the results highlighted the significant difference in opinion; 60% of respondents did see community cinemas and film societies as different from one another, while 40% saw them as the same.

Those who saw a difference were asked to explain that difference. The main trends that emerged from responses were firstly that film societies are organisations which people join and become a member of, while community cinemas are open to the public with a focus on making film accessible. The other trend was one of programming; respondents thought that film societies focused more on specialised titles (foreign language etc.), while community cinemas show more mainstream choices.

Groups were also asked whether they held charitable status. A third (33%) of respondents did. This is a marked increase from 21% five years ago and very close to last year's figure of 35%.



Chart 1 How do you describe your organisation?

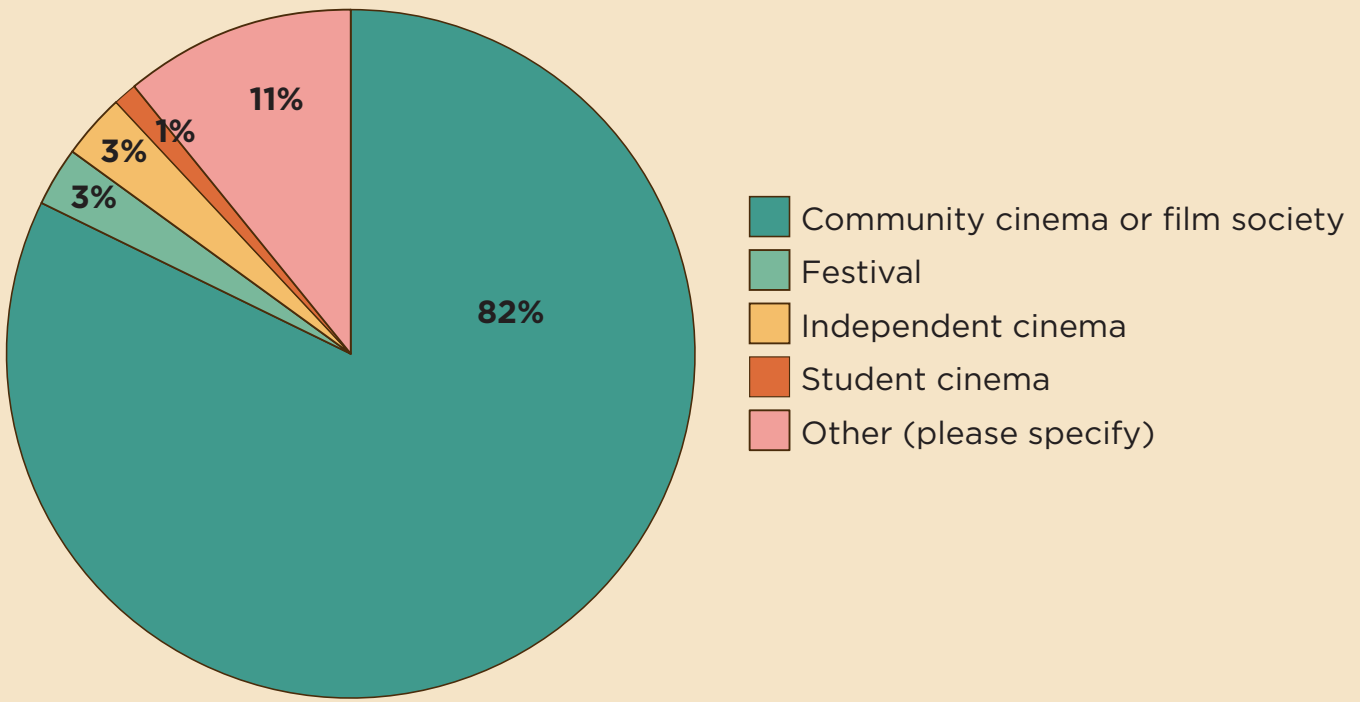


Table 1

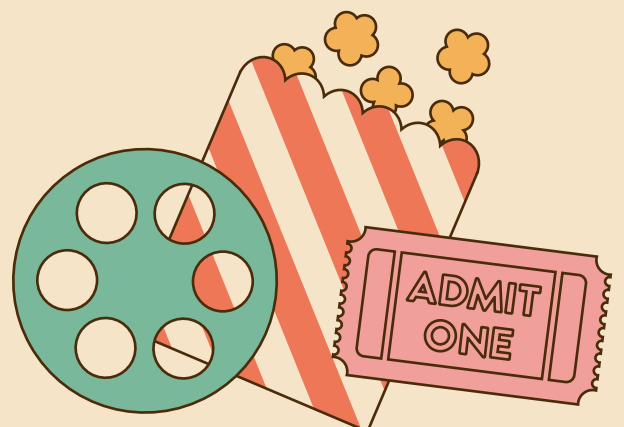
Decade of establishment	2009	2014	2019
1920s earlier	1.0%	0.0%	0.0%
1930s	2.0%	3.0%	1.5%
1940s	4.1%	5.9%	2.9%
1950s	4.1%	3.0%	2.2%
1960s	7.1%	4.0%	5.9%
1970s	6.1%	5.0%	2.9%
1980s	10.2%	5.9%	1.5%
1990s	10.2%	6.9%	2.9%
2000s	55.1%	66.3%	27.2%
2010s	0.0%	0.0%	52.9%

Volunteers and Staff

There are many events aimed at cinema exhibitors, some of which are open to all exhibitors (e.g. ICO Screening Days) whereas some are specifically for community exhibitors (e.g. Cinema For All's Community Cinema Conference and Film Society of the Year Awards.) This year, 64% of respondents attended at least one event aimed at film exhibitors. Of the respondents who specified which events they attended, just under half (44%) mentioned ICO Screening Days, and just under a quarter (24%) attended Cinema For All's conference¹. The main reasons respondents stated for attending exhibitor events were viewing films before their general release in order to assist programming, as well as training and networking opportunities. The main reasons respondents gave for not attending events were the costs involved, needing to take time off work, and the travelling involved.

One benefit of volunteering with a community cinema is the opportunities for specialist training and professional development. Just under a quarter of respondents (24%) reported that staff, or volunteers undertook training, or professional development. This is up from 14% five years ago and 17% last year. The types of training most commonly reported were Personal Licensing for selling alcohol (APLH), first aid and dementia awareness. Multiple groups also mentioned the training they received as part of Cinema For All's coaching programmes. The most common reason respondents gave for not offering training, or professional development to their staff or volunteers was not feeling it was necessary.

Although it is more common for community exhibitors to be run completely by volunteers, some 18% do have paid members of staff.



¹ It should be noted that ICO Screening Days happened six times during the period, while the Cinema For All Conference is an annual event.

Venues

The majority of groups (80%) used one venue for their screenings. Some, however, such as pop-ups, or touring cinemas, used more. This number ranged from 2 to 32, giving an average of 1.9 (excluding one outlier of 550).

Community exhibitors screen in a wide variety of venues ranging from the more traditional community centres, village halls and theatres, to buildings including museums, planetariums and mobile yurts! Chart 2 (page 9) shows that almost half (45%) screen in a village hall, or community centre, over two-thirds (38%) in either an arts centre, theatre, commercial cinema, or school, while 17% selected 'Other'.

Equipment

As Chart 3 (page 9) shows, the majority of respondents (65%) own their own equipment, and just under a quarter (23%) have it provided for them by the venue. Just over a third of respondents (35%) purchased their own equipment within the last year. Of these, just over half (54%) used their general income/ surplus, 40% were awarded funding, or grants, and 17% actively fundraised (crowdfunders, donations etc.)². Of those who had purchased their own equipment, just 9% used Cinema For All's [fundraising guide](#), and the only reason respondents gave for not using the guide was that they were not aware of it.

Audience, Membership and Admission

Audience size

Respondents were asked to give their average audience size over the past year, as well as their largest single audience and total number of admissions. Average audience sizes ranged from 10 to 191³, and the mean average was 56. This is slightly down from last year's 60, and somewhat lower than the average 75 from both five and ten years ago. As Chart 4 (page 9) shows, most groups (67%) had an average audience size of less than 60, while just 10% had an average audience size of more than 100.

The average total number of admissions of the 99 respondents was 2,383 – a rise of over 1,000 from ten years ago (1,360) and almost 500 from five years ago (1,891). Chart 5 (page 10) shows that over half of respondents (55%) reported an increase in their audience numbers since last year. Almost a third (30%) reported no change, and just 15% reported a decrease.

Ticket Price

Entry to community cinemas and film societies is significantly less expensive than commercial exhibitors. This year, the average ticket price for community exhibitors was £6.04, which is over £1 lower than the average commercial ticket price of £7.11⁴. Chart 6 (page 10) shows the average community and commercial exhibitor ticket prices over the last ten years. Ten years ago there was a £1.07 difference in price, but this gradually grew as commercial cinemas increased ticket prices more than community cinemas did. In 2017 the gap peaked with a difference of £2.31, but has since shrunk to (almost) the same as it was ten years ago, at £1.06. Since 2017 commercial cinema ticket prices have decreased slightly each year, while community exhibitor entry has continued to increase. The lowest recorded ticket price was £1, and the highest was £25.

Just under half (47%) of respondents offered a concessionary ticket price, the average of which was £4.33, up slightly from last year's £4.21. On average, a concessionary ticket cost two thirds (67%) of the price of a standard ticket.

² Adds up to more than 100% as some groups had more than one source of funding

³ Excluding one outlier of 5402

⁴ UK Cinema Association

Chart 2 Which of the following is your main venue?

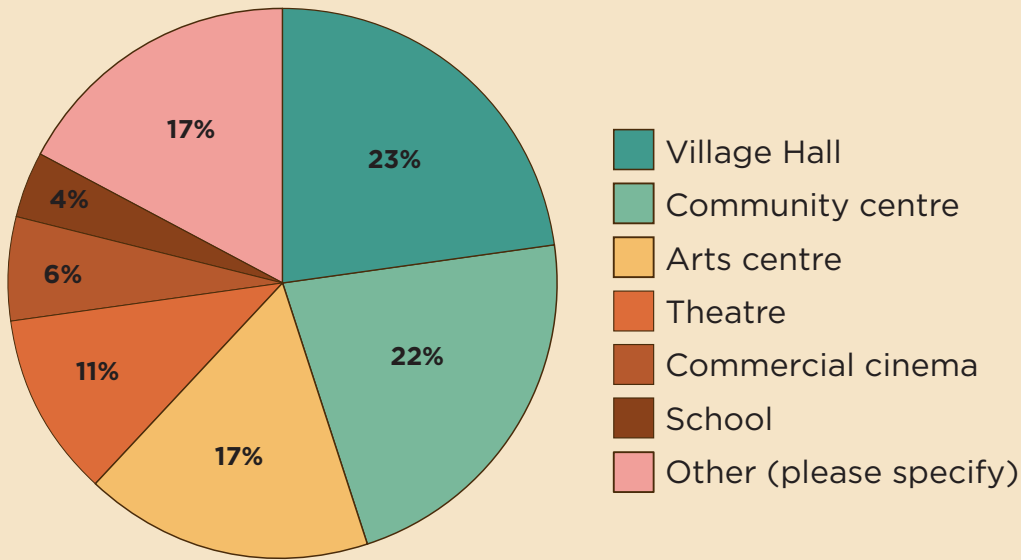


Chart 3 How does your organisation access equipment?

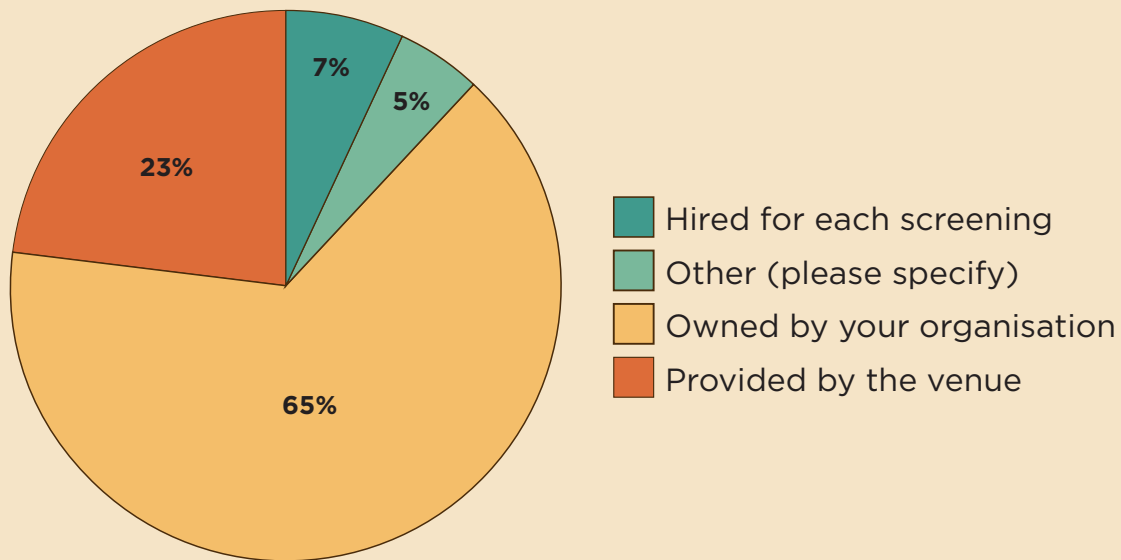


Chart 4 Give your average audience size

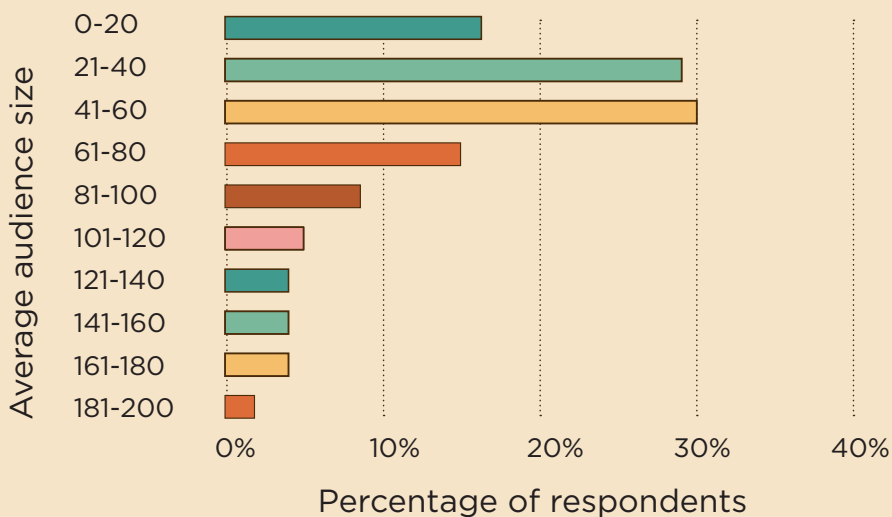


Chart 5 How has your audience size changed over the past year?

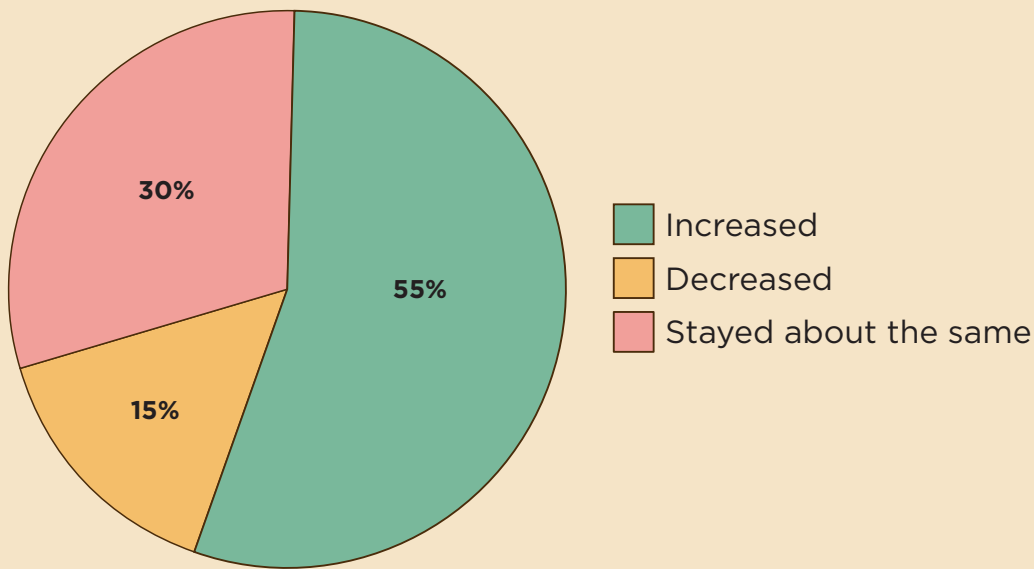
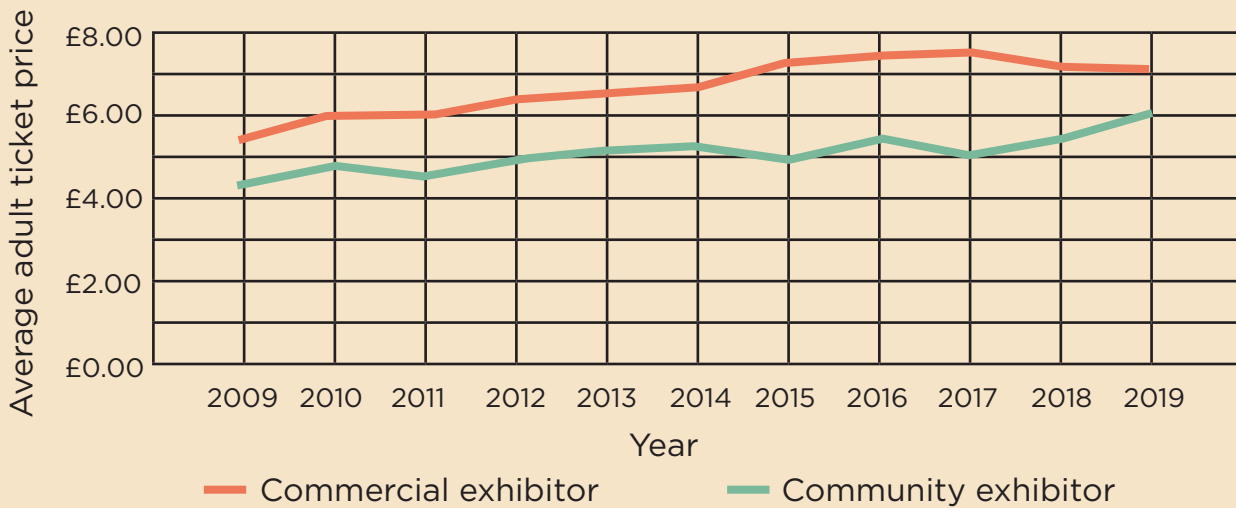


Chart 6 Commercial and Community Exhibitor ticket prices



Membership

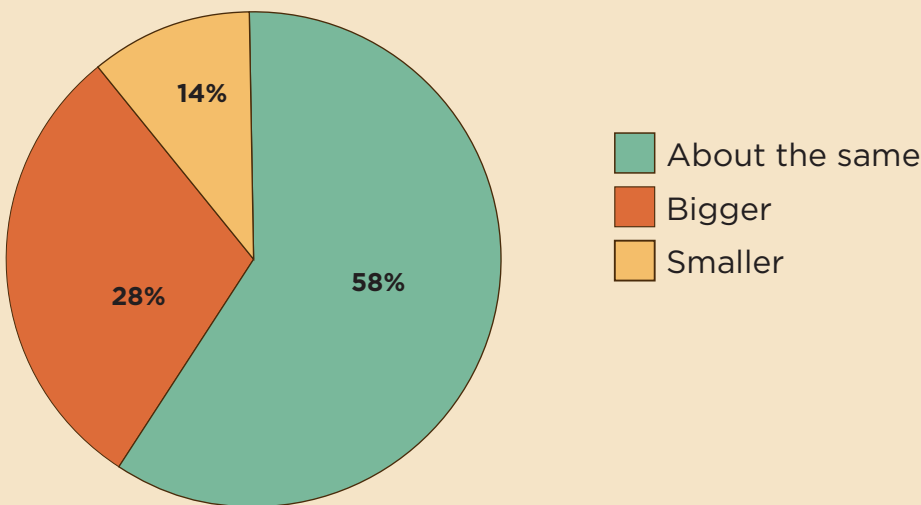
Just over 50% of respondents (62 out of 123) offered a membership scheme of some description. This continues the downward trend we have seen over the last ten years (87% in 2009 and 73% in 2014) and could be seen to reflect the change of community exhibitors' focus towards making cinema available to as many people as possible.

What membership entails differs between community exhibitors. The most common membership offer (43% of respondents) was free entry to all films, or a 'season pass'. 18%, meanwhile, offered free entry to some, but not all, films. 39% offered a reduced ticket price, which was on average 69% lower than the full price⁵. Other benefits of membership included priority booking, access to a lending library of films, exclusive mailing lists and exclusive member screenings. Some respondents did not offer a membership scheme, but did offer a loyalty card.

Of the 59 respondents, the average cost of membership was £32.71. This rise continues the trend seen over the last ten years - £25.98 ten years ago and £29.10 five years ago. The lowest recorded membership price was £2, while the highest was £180. Just under a third (32%) of membership organisations had a concessionary membership rate, the average of which was £30.10. As with public tickets, concessionary memberships cost on average two thirds (68%) of the price of a full membership.

As Chart 7 shows, the majority of membership organisations (58%) reported that the size of their membership stayed about the same this year, while over a quarter (28%) reported an increase. This year just 14% reported a decrease in membership size, compared to 23% last year.

Chart 7 Membership size compared to last year



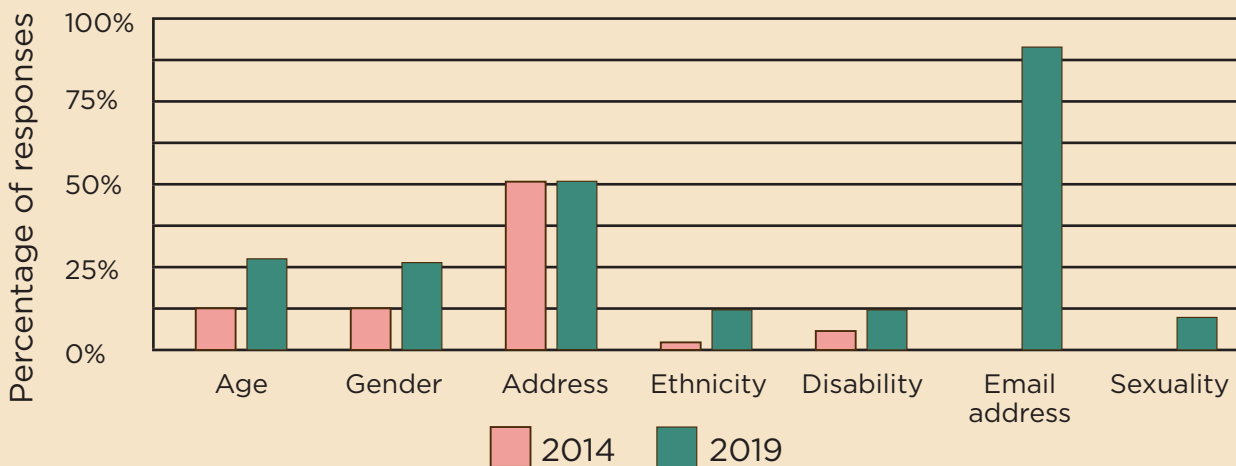
⁵ May not add up to 100% as some groups offered a combination of two (e.g. free entry to some films and reduced ticket price for the rest).

Audience Data

It is often useful for community exhibitors to collect data relating to their audience, or membership. As Chart 8 makes clear, by far the most commonly collected information was members' email addresses. On the whole, significantly more respondents collected data across all categories this year than five years ago, with the exception of Home Address, which was collected by 51% of respondents both this year and five years ago. Despite the growing number of exhibitors collecting data about their audience, or membership, only 37% of respondents said they used this information for evaluation and/ or audience development purposes. The most common specified method of doing this was simply a mailing list, but some respondents did use address information to monitor geographical reach of their marketing outputs.

The introduction of GDPR legislation in May 2018 meant that organisations holding personal, or identifying information about customers, or service users needed to ensure they were compliant with this new data protection legislation. Respondents were asked whether, in light of GDPR, they have changed how they store, or process audience and membership data, to which 60% of respondents answered Yes. Some groups sought specialist guidance on this, either from a solicitor, or on a course, but the most common source of GDPR compliance information was the internet (47%).

Chart 8 Data collected about members



Provision

Location

Respondents were asked which of the eight BFI Film Audience Network regions they are based in. As Chart 9 shows, just under a quarter (23%) of respondents were based in the North. The three nations (Northern Ireland, Scotland and Wales) had the fewest respondents, with just 12% combined.

A *raison d'être* of community exhibitors is bringing cinema to areas that are underserved by traditional cinemas. The average distance between respondents and the nearest commercial cinema was 6 miles. This continues the downward trend seen over the past decade: in 2009 the average distance was 9 miles, and in 2014 it was 7 miles. This implies community exhibitors are increasingly coexisting with their commercial counterparts. The distance range was huge; some respondents were actually based in a commercial cinema venue, while one respondent was 60 miles from the nearest. 21% of respondents' nearest commercial cinema was at least ten miles away, while 23% had one a mile, or less from their venue.

This year, the numbers of groups operating in rural areas, towns and cities are closer than ever before, with 39% in rural areas, 33% in towns and 28% in cities. As Chart 10 (page 14) makes clear, an interesting trend over the last ten years is a dramatic increase in city-based groups, again suggesting an increasing coexistence between community and commercial exhibitors, as well as a greater demand for choice from audiences.

Community Benefits

Community exhibitors are beneficial to their local areas in a multitude of ways. Respondents were asked how much they felt their cinemas offered various benefits to their local community. Chart 11 (page 14) shows each of the listed benefits' percentage score based on a weighted average. The biggest benefits exhibitors brought to their communities were offering value for money (84%), broadening the range of films available locally (84%), and making use of local facilities (83%). The lowest scoring benefit was 'engaging under 19s in community activities', with a score of 32%.

Chart 9 Regional breakdown of responding organisations

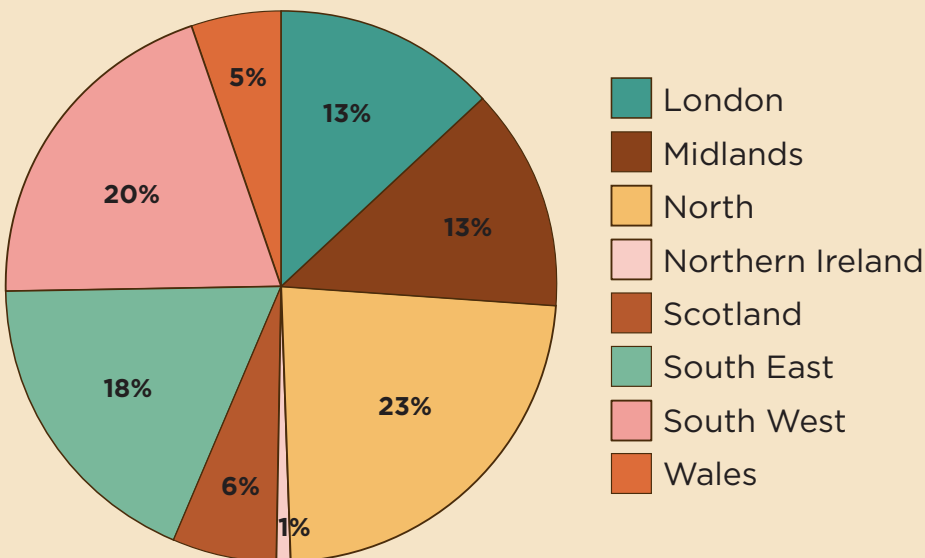


Chart 10 Community exhibitors operating in a city

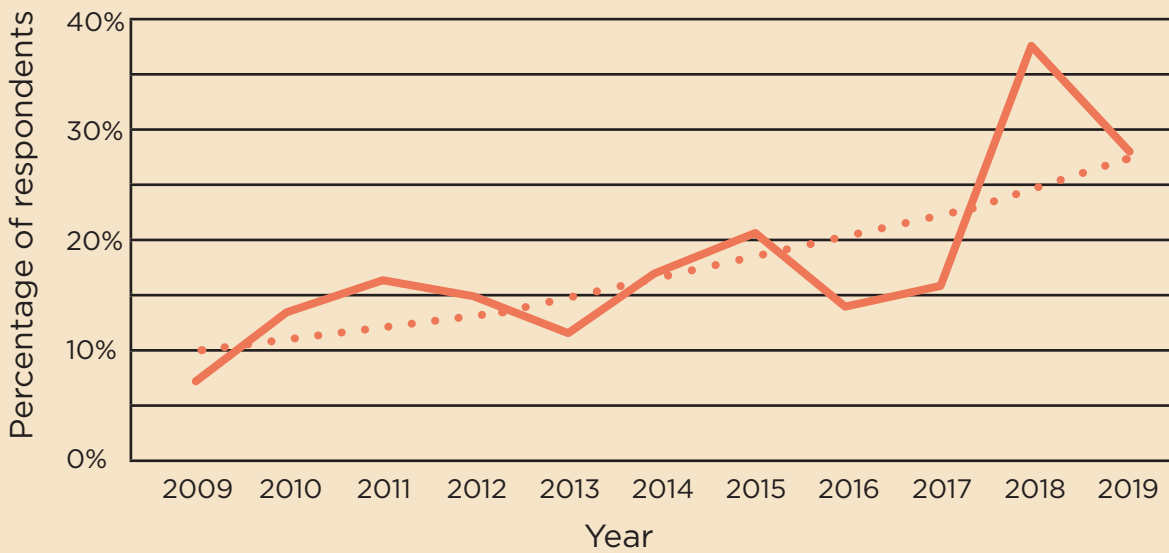
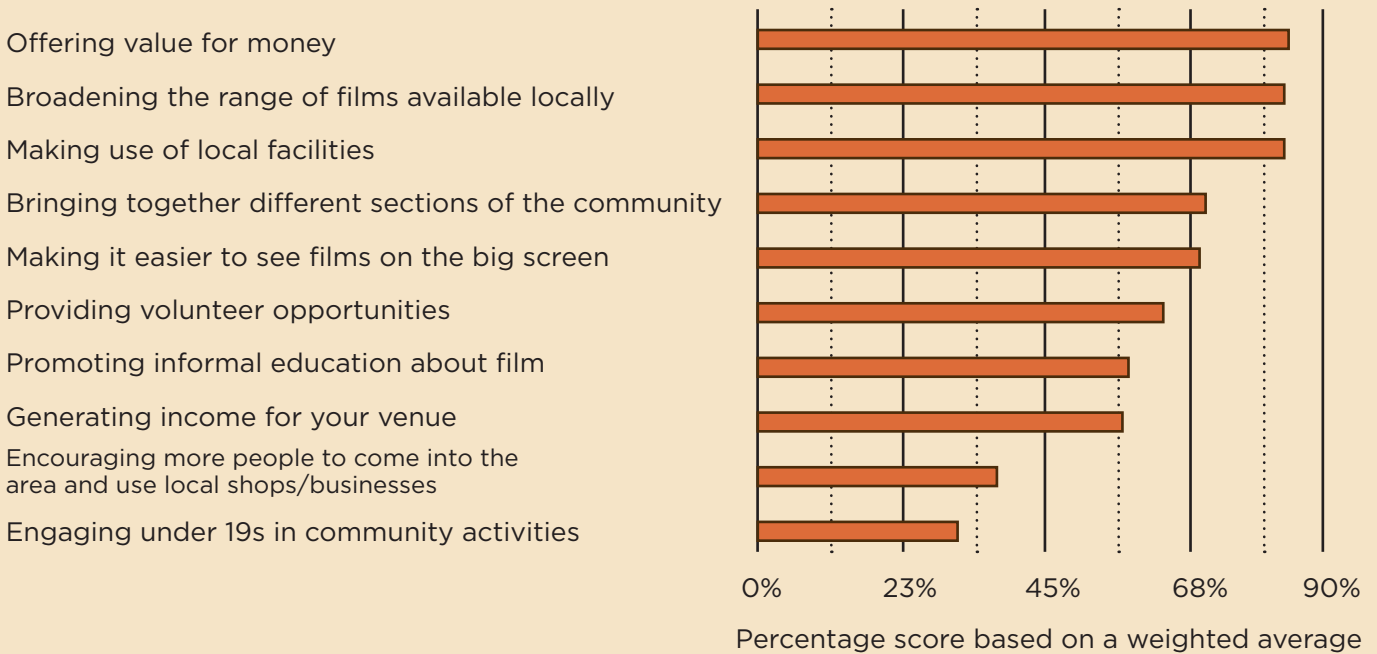


Chart 11 Benefits community exhibitors have on local communities



Programming

Formats

As Chart 12 shows, community exhibitors screen films on a variety of formats. Just over half of respondents usually screen from Blu-ray discs, while just 10% never do. 19% usually, or sometimes screen using digital cinema equipment (i.e. DCP), which is the same figure as last year. Another 10% either usually, or sometimes screen from 35mm prints.

Screening format has been one of the things that has changed dramatically over the last ten years. In 2009 just 5% of community exhibitors either usually, or sometimes screened from Blu-ray, whereas in 2019 the figure is 90%. Similarly in 2009 29% of groups usually or sometimes screened from 35mm film, compared to this year's 10%.

Screening Frequency

It is most common for community exhibitors to hold screenings between one and three times per month. As Chart 13 shows, this was the case for almost three quarters (72%) of respondents. This continues a very slight downward trend over the past ten years: 84% in 2009 and 79% in 2014. The average number of screenings held by respondents across the year was 29.

Chart 12 Formats used by community exhibitors

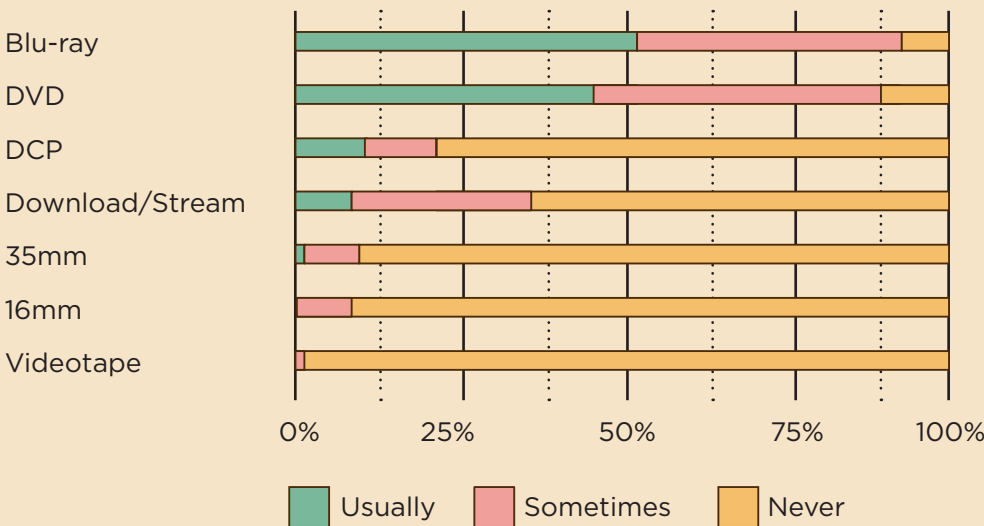
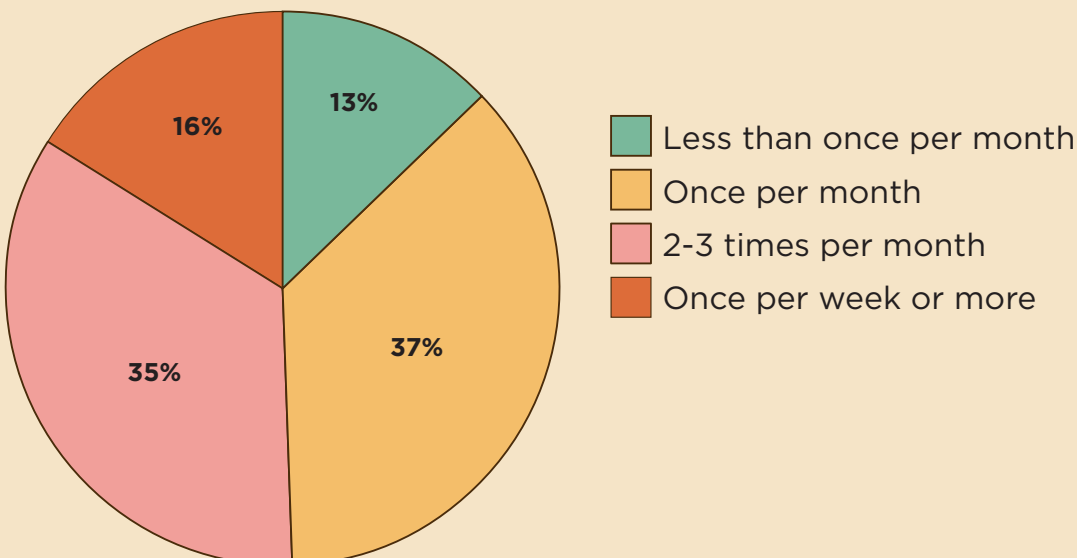


Chart 13 Community exhibitors screening frequency



Planning and Licences

It is most common for groups to plan their programme (47%) and obtain screening licences (52%) between one and three months ahead of a given screening. As one would expect, exhibitors tended to plan their programmes further in advance of a screening than they obtain the licences; just over three quarters (79%) of respondents planned their programmes between one and six months before a screening, whereas a similar amount (75%) obtained their licences fewer than three months' in advance, potentially raising questions about how many groups advertise screenings before having licences confirmed. See Table 2 for more details.

Table 2 Percentage of Respondents

Amount of time before screening	Plan Programme	Obtain Licences
Less than one month	3%	23%
1-3 months	47%	52%
4-6 months	32%	16%
7-12 months	13%	6%
12+ months	7%	4%

Variety of Films

Year on year, community exhibitors offer exciting and varied programmes of films, and this year was no different. As Chart 14 (page 18) shows, the 100 respondents screened 720 foreign language films and 623 British films, which respectively is 24% and 21% of the total number of films screened by respondents.

As Table 3 shows, there has not been a great deal of change over the past decade in the percentage of different types of films being screened by community exhibitors. The type of films with the most significant change is shorts, with a noticeable upward trend.

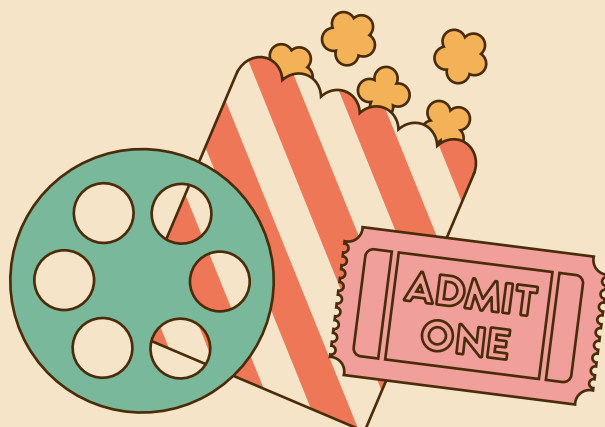
As always, the list of titles respondents screened was extremely varied. A total of 853 different films were screened by 96 respondents, a full list of which can be seen in Appendix 1. Over two thirds (68%) of these were screened by just one respondent; a demonstration of how diverse community exhibitors' programmes are. Table 4 (page 17) shows the 23 films screened by at least ten respondents; over half (61%) of these were either British or in a foreign language which demonstrates the interesting variety of films community cinemas screen.

Table 3 Percentage of Respondents

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
British	25%	12%	26%	2%	10%	25%	25%	25%	24%	24%	21%
Foreign language	49%	20%	27%	28%	15%	29%	26%	26%	22%	28%	24%
Documentaries	6%	3%	3%	5%	3%	6%	7%	6%	6%	6%	6%
Shorts	9%	4%	7%	5%	7%	15%	12%	13%	11%	11%	14%
Archive	1%	2%	3%	2%	1%	1%	3%	2%	2%	3%	2%
Made before 2000	18%	9%	16%	9%	8%	16%	17%	14%	13%	16%	14%
Cinema For All Booking Scheme	5%	3%	5%	4%	4%	5%	6%	7%	6%	7%	6%
Alternative Content	-	-	0%	1%	1%	2%	5%	7%	4%	7%	6%

Table 4

Title	Country	Number of screenings
Three Billboards Outside Ebbing, Missouri	USA	24
A Fantastic Woman	Chile	19
Shoplifters	Japan	18
In Between	Israel	17
The Greatest Showman	USA	15
The Breadwinner	Canada / Ireland	15
Bohemian Rhapsody	UK	15
Cold War	Poland	14
The Guernsey Literary and Potato Peel Society	UK	12
A Star is Born	USA	13
The Death of Stalin	UK	12
The Favourite	UK	12
Paddington 2	UK	12
Mamma Mia: Here We Go Again	USA	11
Leave No Trace	USA	11
Film Stars Don't Die In Liverpool	UK	11
Finding Your Feet	UK	10
BlacKkKlansman	USA	10
Hidden Figures	US	10
Loving Vincent	UK	10
The Rider	USA	10
Loveless	Russia	10
A Man Called Ove	Sweden	10



Activity

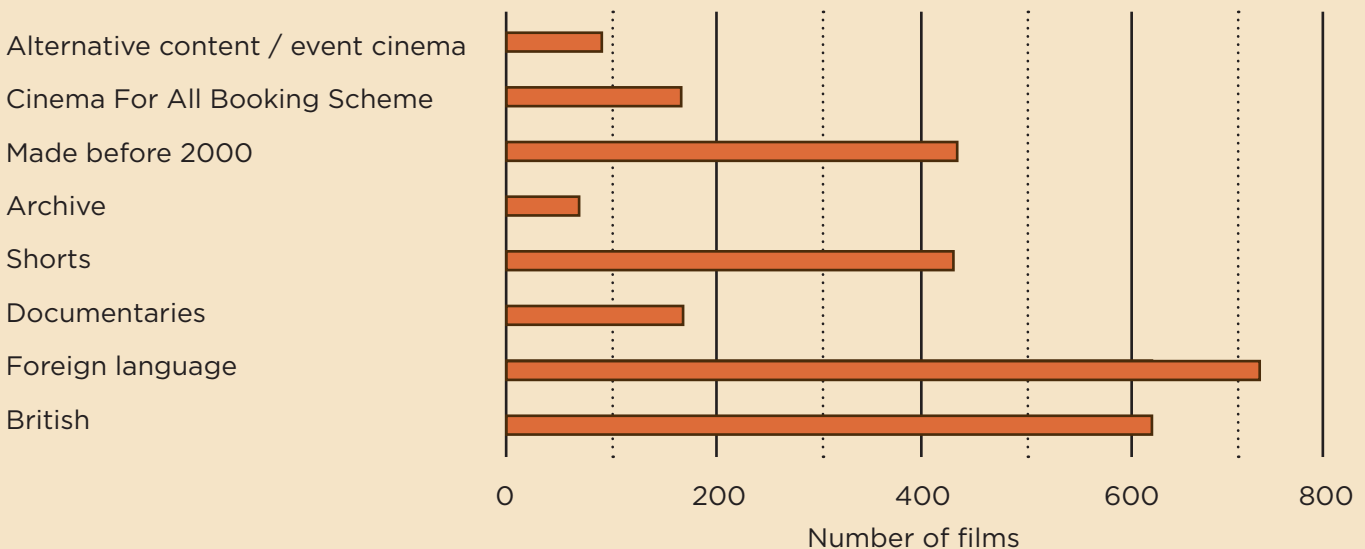
Once again, over half (57%) of respondents held some sort of special event in addition to their screenings. This figure has stayed around the same for the past ten years, with 51% of respondents in 2009 and 54% in 2014. The most common activities exhibitors reported were Q+As, guest speakers, immersive elements and live music.

Half of all respondents provided programme notes at some, or all of their screenings, helping to provide informal film education. This is slightly less than the 69% of respondents who provided programme notes both in 2009 and 2014. Similarly, just under half (49%) of respondents collected audiences' reaction scores to films, down from 69% ten years ago and 60% five years ago.

Respondents were asked what they felt their contribution to 'film culture' is. The running theme across responses was that community exhibitors continually increase the range of films available to the local community, with a particular focus on foreign language films, or world cinema.

Groups were also asked to what extent they thought the onscreen representation of marginalised communities was, and to what extent they consciously contributed towards it. 60% of respondents thought it was an important issue, and bore it in mind when choosing their programme.

Chart 14 Types of films screened by community exhibitors



Cinema For All

Membership

Most respondents (88%) were either full, or associate members of Cinema For All. The most common reasons for groups not being members were that their organisation was not suitable for membership (e.g. a network of cinemas), or that they plan to join in the future, but have not got around to it yet.

Services

Respondents were asked about how often they use various Cinema For All services. Table 5 (page 20) shows the results, while Chart 15 (page 21) shows each service's usage score⁶. The four most frequently used services were the website, Newsreel, advice service and Booking Scheme, which were used at least once every three months by 69%, 50%, 25% and 27% of respondents respectively. Programming notes, the Community Cinema Conference, Equipment Hire Scheme and the Starter Pack were the least commonly used. This makes sense: programming notes are only available for certain titles, the Conference happens once per year, the Equipment Hire Scheme is rarely used by groups who have other means of accessing equipment, and the Starter Pack is aimed at groups just starting out.

Chart 16 (page 21) shows the four most frequently used services' usage scores from 2009, 2014 and this year. There is a broad upward trend across all four services, suggesting the proportion of groups using Cinema For All's services has increased over the decade.

As well as being asked about how often they used Cinema For All services, respondents were also asked to rate them on a scale from 'very poor' to 'very good'. Table 6 (page 20) shows the results of this, while Chart 17 (page 22) shows each service's approval score⁷. None of the services were rated 'very poor' by any respondents, which is testament to the high standard of service that Cinema For All provides. The highest rated service was the coaching schemes (Launchpad and Sustain), with the vast majority of respondents (89%) rating them 'very good', and the remaining 11% rating them 'good'. The Starter Pack and the Community Cinema Conference were also very highly rated, with 100% and 94% of respondents respectively rating them 'very good' or 'good'. The website and Newsreel were the lowest rated, but even these were not rated 'poor' or 'very poor' by any respondents, and were both rated 'very good' by just under half of respondents (46% and 47% respectively). It should be noted that the two lowest rated services were also the two most frequently used, therefore allowing a wider variety of ratings than a service just used by a handful of respondents.

⁶ 'Usage score' is a number between 0 and 5, calculated by awarding a 'once a month or more' response 5, 'once every 2 to 3 months' 4, 'once every 6 months' 3, 'once a year or less' 2 and 'never' 1. A service that is only used by respondents once a month or more will have a usage score of 5, and one that is never used will have a usage score of 0.

⁷ 'Approval score' is a number between 0 and 5, calculated by scoring 'very good' ratings 5, 'good' 4, 'okay' 3, 'poor' 2 and 'very poor' 1. A service that is only rated 'very good' will have an approval rating of 5, and one that is only rated 'very poor' will have an approval rating of 0.

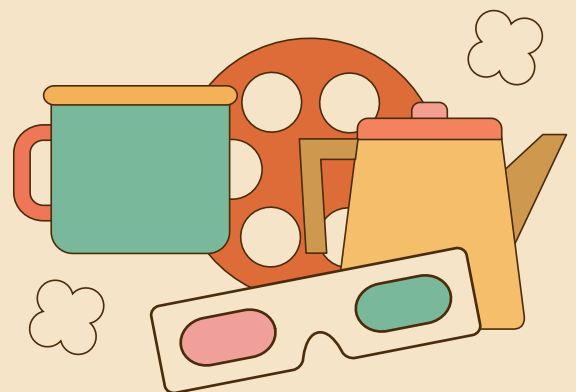


Table 5

	Once a month or more	Once every 2 to 3 months	Once every 6 months	Once per year or less	Never
Newsreel	35%	15%	6%	9%	35%
Website	26%	43%	16%	11%	4%
Booking Scheme	5%	22%	16%	26%	32%
Advice/ enquiries	4%	21%	22%	26%	28%
Starter pack	3%	2%	2%	7%	86%
Equipment hire	3%	5%	4%	4%	84%
Technical advice	2%	7%	8%	22%	61%
Programming notes	1%	3%	6%	15%	75%
Advice leaflets	1%	2%	7%	21%	69%
Film Society of the Year Awards	1%	2%	1%	31%	65%
Community Cinema Conference	0%	2%	1%	31%	66%
Member discounts	0%	7%	8%	16%	69%
Regional viewing sessions	0%	3%	16%	17%	64%

Table 6

	Very good	Good	Okay	Poor	Very poor
Newsreel	47%	30%	23%	0%	0%
Website	46%	34%	20%	0%	0%
Programming notes	38%	52%	10%	0%	0%
Advice leaflets	50%	38%	13%	0%	0%
Booking Scheme	61%	23%	16%	0%	0%
Advice/ enquiries	64%	21%	16%	0%	0%
Technical advice	66%	25%	9%	0%	0%
Equipment hire	75%	13%	6%	6%	0%
Regional viewing sessions	63%	30%	7%	0%	0%
Member discounts	76%	8%	16%	0%	0%
Film Society of the Year Awards	69%	28%	3%	0%	0%
Starter pack	70%	30%	0%	0%	0%
Community Cinema Conference	77%	16%	6%	0%	0%
Launchpad/ Sustain	89%	11%	0%	0%	0%

Chart 15 Cinema For All services usage frequency

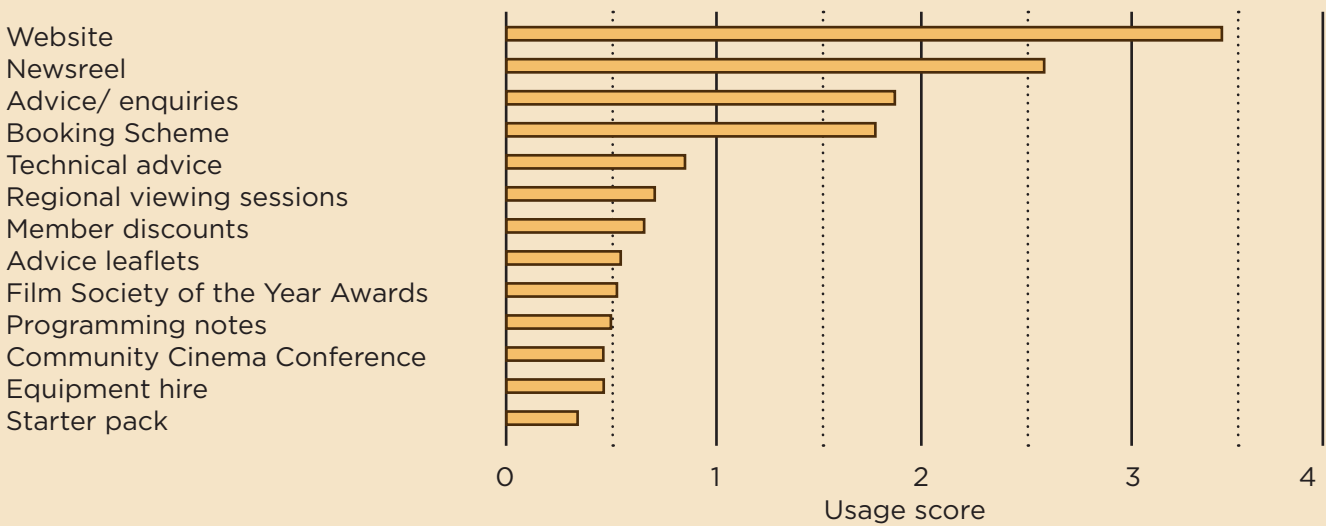


Chart 16 Top Cinema For All services' usage over the last decade

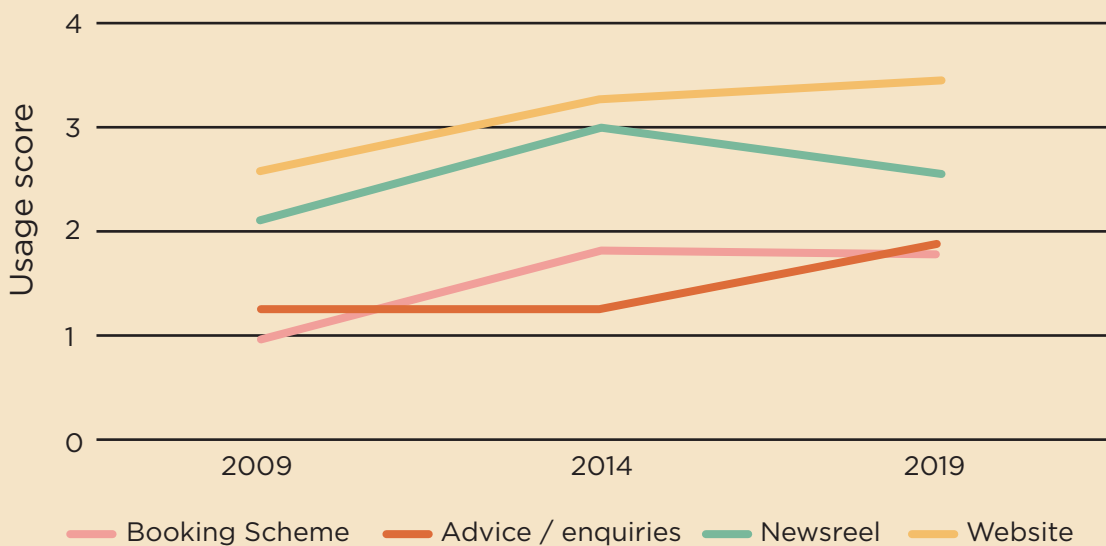


Chart 18 (page 22) shows the Booking Scheme, member discounts, the Starter Pack and the Community Cinema Conference's approval score from this year, five years ago and ten years ago. In each of the services there has been a very clear improvement, again showing Cinema For All's year on year commitment to improving their offer for the community exhibitor sector.

Respondents who were participants in the Launchpad and Sustain coaching programmes were asked to comment on ways it impacted their organisations. The overarching theme across responses is that groups hugely appreciated the wealth of advice and support offered throughout the programme. Across both Launchpad and Sustain, multiple respondents mentioned feeling connected to other groups, or being a part of a 'bigger picture' as something that had impacted them. Launchpad participants particularly commended the encouragement to 'get off their feet', while a common theme among Sustain participants was the knowledge they gained around marketing and publicity.

Users of Cinema For All's Equipment Hire Scheme were also asked to comment on how it impacted them. The two main themes that emerged were that it allowed new groups who did not have their own equipment to get started, and it allowed existing groups to screen in alternative venues.

Chart 17 Benefits community exhibitors have on local communities

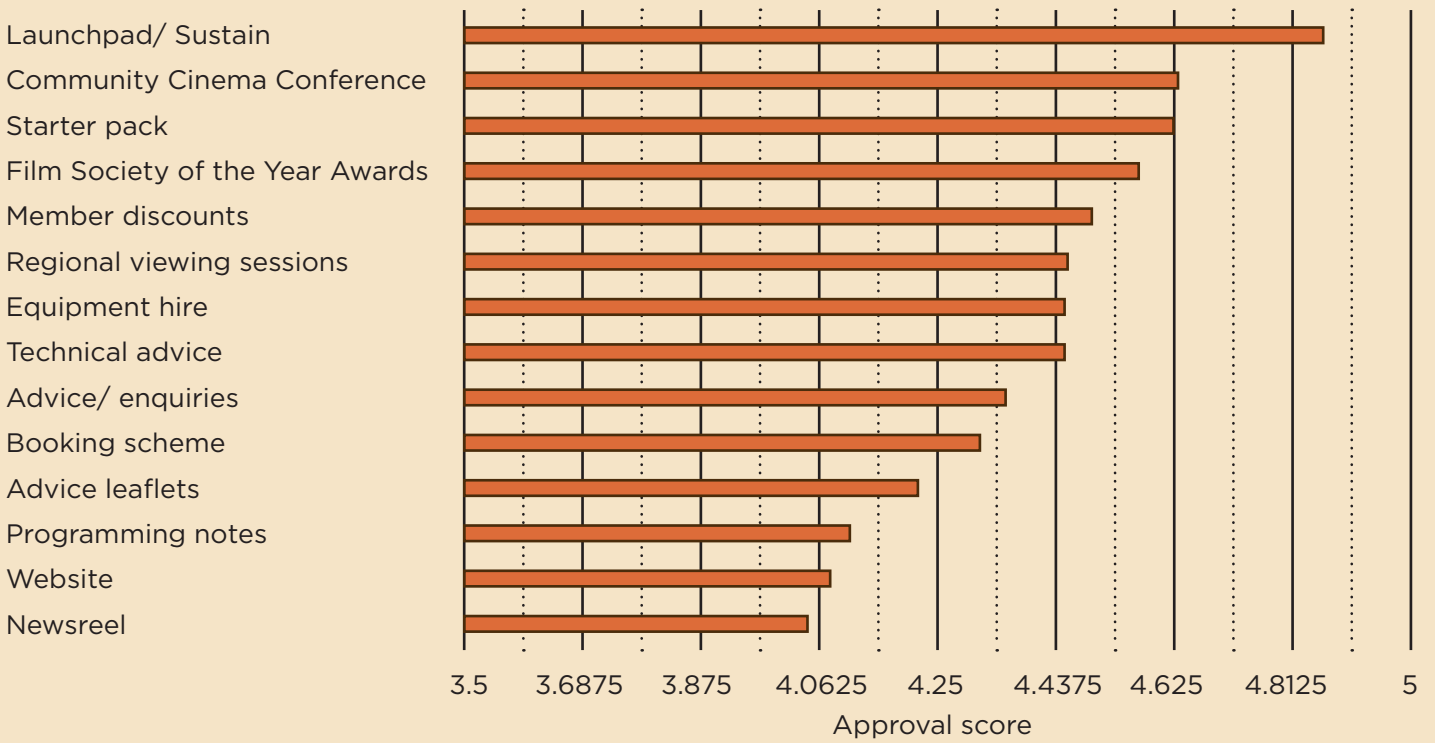
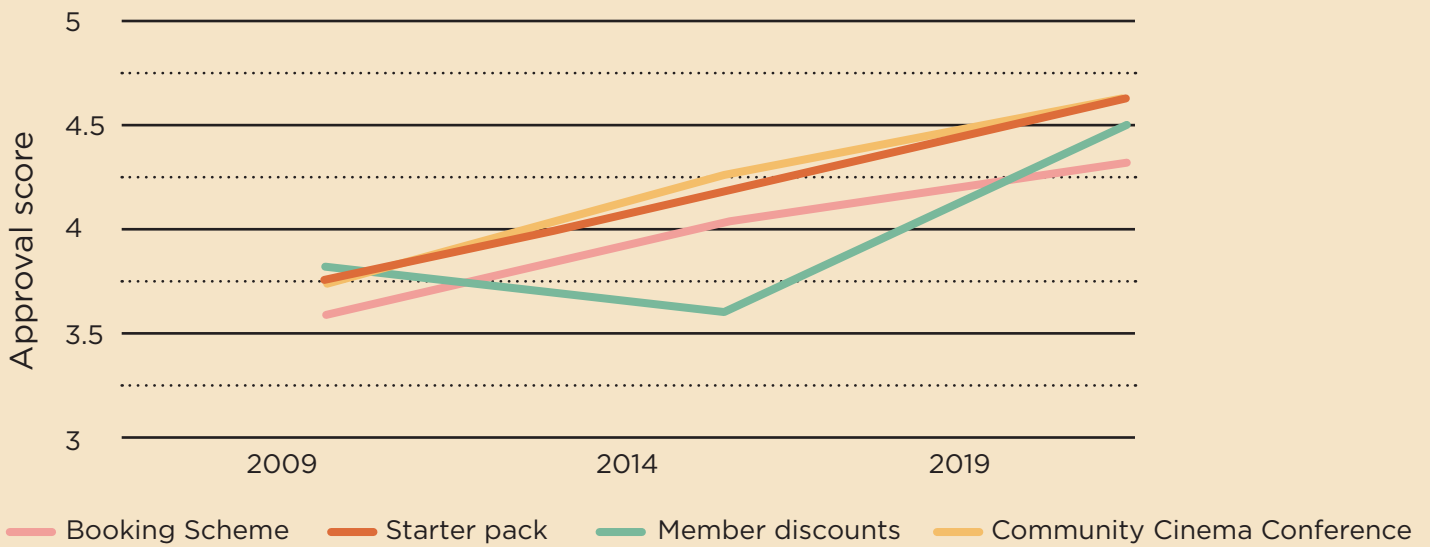


Chart 18 Top Cinema For All services' approval rating over last ten years



Cinema For All as a whole

Respondents were asked what they valued about Cinema For All, and in what impact it has had on their organisation. There was a huge variety of responses, but certain themes were more prevalent than others. The most cited value was the advice and support available either on the phone, or over email, with many respondents specifically pointing out the helpful, friendly and approachable nature of the team. The Booking Scheme was another service that lots of respondents singled out as being of high value to them. Being part of a national community/ movement was another thing that respondents valued about Cinema For All.

Most respondents (90%) saw Cinema For All as an organisation that represents the interests of community cinemas on a national level. The fact that Cinema For All connects groups from all over the country and brings them into a wider community was the most cited reason. Some respondents felt that Cinema For All did represent community exhibitors' interests on a national level, but weren't sure about specific ways in which this was done.

When asked what Cinema For All could do to improve their services, responses were varied. The most common recurring suggestion was widening the range of films available through the Booking Scheme. A large proportion of responses were positive, (e.g. "You are doing a great job. Keep up the excellent work!", "Can't think of anything. You do a great job already."), some suggested specific services, which in reality are not possible to implement (e.g. making a deal with Netflix, someone from the Cinema For All team attending members' screenings, cheaper licences through other organisations), while some suggested services which other organisations already offered (e.g. [calendar of UK cinema releases](#)).



The Sector

Looking Back

Three main themes arose when respondents were asked about their biggest challenge over the past year: finances, audience size and programming. Of those who mentioned finances, just over a third (36%) mentioned that successfully applying for pots of funding was a challenge. A quarter of those who stated growing their audience as their biggest challenge specifically mentioned engaging young people, which is a common struggle for exhibitors across the industry. The two main areas of programming respondents cited as a challenge, was balancing mainstream and more niche films, as well as sourcing licences for certain titles.

As well as being asked about their biggest challenges over the past year, respondents were also asked what they felt their biggest achievement was. 22% of respondents described their biggest achievement as an increase in audience numbers on last year. The other commonly cited achievement was recognition, both from audience members / the community, and through awards (including the Film Society of the Year Awards.)

Looking Ahead

Respondents were asked to consider what challenges they predict having to overcome in the next five years as an organisation, as well as to describe any goals they have for the next five years. As one would expect, the most commonly cited (28%) challenge respondents foresaw was maintaining sustainable audience numbers. Almost as common as this, however, was maintaining active volunteers to keep cinemas running, with 27% of respondents expressing concern here. For both of these challenges, many respondents specifically mentioned engaging young people. Another common theme to emerge was the challenge of competing with ever-popular streaming services.

Goals for the next five years broadly reflected the above expected challenges, with organisations expressing a desire to overcome challenges rather than be defeated by them – many respondents simply replied ‘keeping going’ as their main goal!

When asked about how respondents predicted the community exhibitor sector changing over the next five years, the most common theme was seeing an increase in people staying at home to watch films on streaming services rather than going out to the cinema. The other recurring theme to do with streaming services was companies producing their own content which is not made available for public exhibitors. Some respondents, however, were more positive about the possibilities of streaming, with one respondent pointing out the potentially wider choice of available films as a benefit.

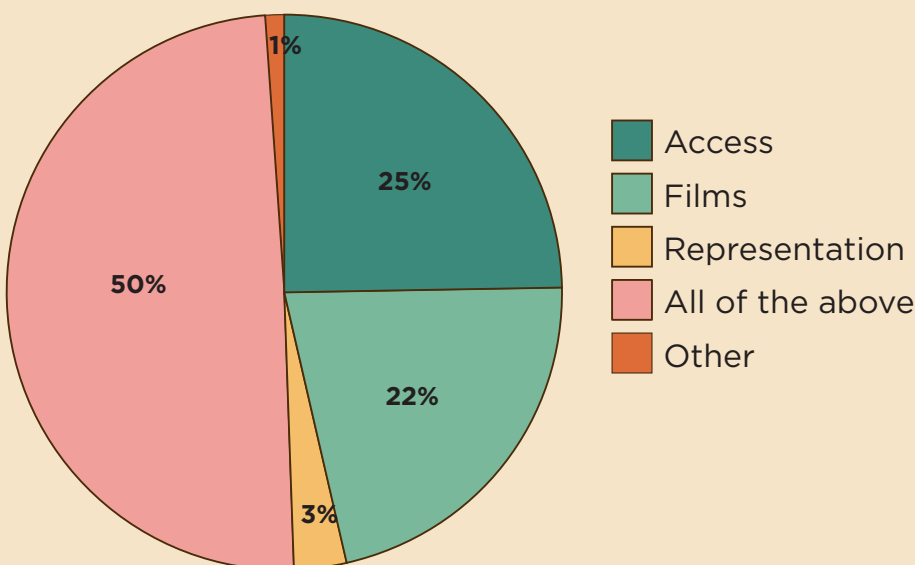
'cinema for all'?

Respondents were asked what the concept of 'cinema for all' meant for their organisation, selecting from the following options:

- Access - all people should have affordable access to the shared experience of cinema, wherever they live
- Films - bringing the best in cultural and independent film to people who would not otherwise see those films
- Representation - creating a cinema culture that better represents the diverse cultures and communities of the UK
- A balance of all - a more representative cinema, increasing access to a broad range of film for all people, wherever they live, while showcasing the best in independent and cultural cinema
- Other

The results of this are displayed in Chart 19. Half of respondents were of the opinion that the somewhat elusive concept of 'cinema for all' was a mix of Access, Films and Representation. Of those who did select one particular option, there was an almost even split between Access and Films (24% and 22% respectively), with a slight preference for the former. Just 3% of respondents selected Representation as reflecting most accurately the concept of Cinema For All.

Chart 19 What 'cinema for all' means to respondents



Appendix 1

List of films screened by respondents

120BPM (Beats Per Minute)	Breakfast at Tiffany's	Deadpool 2	Flounder, The	Holiday, The
1945	Breaking Ground	Death at a Funeral	Foreign Field, A	Hommes Libres, Les
1985	Breathless	Death of Louis XIV, The	Fragments of a Dream	Hostiles
2001: A Space Odyssey	Bridge of Spies	Death of Stalin, The	Frantz	Hotel Artemis
20th Century Women	Bridget Jones' Baby	Demain	Freak Show	Hotel Salvation
24 Hour Party People	Brief Encounter	Denial	Free Solo	Hotel Transylvania
400 Blows, The	Britain On Film: Coast and Sea	Despicable Me 3	Freedom Fields	House With A Clock In Its Walls, The
Abigail's Party	Britain on Film: Protest	Destroy All Monsters	Fried Green Tomatoes at the Whistlestop Café	How to Talk to Girls at Parties
About Time	Bromley Boys	Destroyer	Frozen	How to Train Your Dragon
After the Storm	Brown Willy	Diamantino	Fruitvale Station	Human Flow
Aida	Buena Vista Social Club	Die Hard	Full Monty, The	Hundred-Foot Journey, The
Airplane!	Bullitt	Diego Maradona	Funny Cow	Hunt for the Wilderpeople
Alan Partidge: Alpha Papa	Burning	Dig, The	Funny Face	Hunter, The
Ali Zaoua	Buster Keaton	Dior and I	Game Night	Game Over
Alice Adventure's in Wonderland (Royal Ballet)	But I'm a Cheerleader	Dirty Dancing	Gatherings, Les	Gardiennes, Les
Alien	Cabinet of Dr Caligari, The	Dirty Rotten Scoundrels	Gathering Storm, The	Gazza, La
All About Eve	Caernaum	Disobedience	Gazzetta, La	Gentle Creature, A
All Is True	Calamity Jane	Divine Order, The	Gentlemen Prefer Blondes	Gentlemen Prefer Blondes
All Quiet on the Western Front	Call Me By Your Name	Django Unchained	Germany Year Zero	Get Out
All the Money in the World	Can You Ever Forgive Me?	Don Carlos	Get Riel	Ghost Stories
All the President's Men	Canterbury Tale, A	Don Giovanni	Ghost Story, A	Ghost, The
All the Wild Horses	Capernaum	Dozy	Girl	Girl on the Train, The
Amant Double, L'	Captain America	Downfall	Girls Rising	Girls Rising
Amelie	Captain Fantastic	Downsizing	Giulio Cesare	Gleaners and I, The
America I Think	Carmen	Draughtsman's Contract	Glenn Miller Story, The	Glory
American Animals	Carousel	Drummer and the Keeper, The	Glory of the Garden, The	Gods
American Made	Cars 3	Duck Soup	God's Own Country	Golden Years - Grand Theft OAP
American Tail, An	Casablanca	Dumbo	Golden Years - Grand Theft OAP	Goldstone
Ana de Dia	Casablanca Calling	Dunkirk	Good Time	Good, The Bad, and The Ugly, The
Anchor and Hope	Casque d'or	Dystopia Utopia	Good, The Bad, and The Ugly, The	Goodbye Berlin
Angel's Share	Catch Me If You Can	Eagle Huntress	Goodbye Berlin	Goodbye Christopher Robin
Annie	Central Station	Early Man	Graduate, The	Graduation
Apostasy	Ceremonie, La	Easy Rider	Grand Budapest Hotel, The	Grand Illusion, La
Aquarius	C'est la Vie	Eaten By Lions	Grasp the Nettle	Grease
Arcadia	Ceuta, Prison by the Sea	Eddie the Eagle	Great Dictator, The	Gremlins
Arrival	Charlie Chaplin: The Gold Rush	Edie	Greatest Showman, The	Guardians of the Galaxy
Arthur Christmas	Chicago	Eight Days A Week: The Touring Years	Green Book	Guardians of the Galaxy Vol. 2
Ash is the Purest White	Children Act, The	Eighth Grade	Gremlins	Guernsey Literary & Potato Peel Pie Society, The
Assassination Nation	Children on Men	El Sur	Guardians of the Galaxy	Guess Who's Coming to Dinner
Audience, The	Chimes at Midnight	Elena	Guilty, The	Hacksaw Ridge
Avengers	Chitty Chitty Bang Bang	Elf	Hale County This Morning, This Evening	Hampstead
Avengers: Infinity War	Chocolat	Elisir d'Amore, L'	Hampstead	Hans Christian Andersen
Avventura, L'	Chronicle	Enchanted	Happy as Lazzaro	Happy Death Day
Babette's Feast	Churchill	Enchanted April	Happy End	Happy Prince, The
Bachelor Party	Ciambra, A	Enemies of the People	Harold and Maude	Hate U Give, The
Back to Burgundy	Cigarettes and Coffee	Evelyn	Hate U Give, The	Have a Nice Day
Bad Samaritan	Cinema Paradiso	Even When I Fall	Have a Nice Day	Havre, Le
Bad Times at the El Royale	Cirque du Soleil: Worlds Away	Evil Dead 2	Headstart	Heart of Britain, The
Badlands	City Lights	Exhibition On Screen: Canaletto	Headwig and the Angry Inch	Hedwig and the Angry Inch
Bal	City of God	Eyes of Orson Welles, The	Heiresses, The	Help, The
Ballad of Shirley Collins, The	Clash	Faces Places	Hen	Hereditary
Barbiere di Seviglia, Il	Cleek	Fade, The	Hero	Hidden Figures
Battle of Algiers, The	Climax	Fallen Soldier	Heure d'Ete, L'	High Society
Battle of the Sexes	Clue	Falso Positivos	Hidden Figures	His Girl Friday
Beast	Clueless	Fantastic Beasts: The Crimes of Grindelwald	Historias Minimas	Hocus Pocus
Beasts of the Southern Wild	Coastal Drift	Fantastic Woman, A	Hoculus	
Beat That My Heart Skipped, The	Coco	Farenheit 9/11		
Beats	Cocote	Fargo		
Beautiful Boy	Cold Comfort Farm	Fatima		
Beauty & the Beast	Cold War	Favourite, The		
Before Sunrise	Colette	Felicite		
Bicycle Thieves	Colombus	Fencer, The		
Big Blue, The	Concert, Le	Fences		
Big Lebowski, The	Cool Runnings	Ferdinand		
Big Short, The	Cornish Tommies	Ferris Bueller's Day Off		
Billy Elliot	Così fan Tutte	Fidelio		
Birds of Passage	Counterfeiters, The	Fight Club		
Birds, The	Court	Fille Du Regiment, The		
Black Moon	Crazy Rich Asians	Film Stars Don't Die in Liverpool		
Black Orpheus	Crimes of Grindelwald	Filmworker		
Black Panther	Crowhurst	Final Journey, The		
Black Power Mixtape	CuBOYd, The	Finding Vivian Maiher		
Blackkkklansman	Custody	Finding Your Feet		
Blade Runner 2049	Dad's Army	First Man		
Blithe Spirit	Dam Busters, The	First Reformed		
Blockers	Darby O'Neill	Fish and I, The		
Bloomers	Dark Horse	Fish Tank		
Blues Brothers, The	Dark River	Fisherman's Friend		
Boheme, La	Darkest Hour	Fishmonger Scales and Other Red Herrings		
Bohemian Rhapsody	Dave Made a Maze	Flame		
Bombin'	David Bowie Is	Flash Gordon		
Bombshell: The Hedy Lamarr Story	David Byrne's True Stories	Fledermaus, Die		
Bookshop, The	Dawn Patrol, The	Flicker		
Border	Dawson City: Frozen Time	Florence Foster Jenkins		
Boring Afternoon, A	Day in the Life, A	Florida Project, The		
Born in Flames	Day the Earth Sleeps, The			
Breadwinner, The	Dead in a Week or Your Money Back			

Lez Bomb
 Life is Beautiful
 Lift to the Scaffold
 Light Between Oceans, The
 Like Father, Like Son
 Like Water for Chocolate
 Lion
 Little Miss Sunshine
 Little Stranger, The
 Lodger, The
 London Road
 Loneliness of the Long
 Distance Runner, The
 Long Good Friday, The
 Lords of Chaos
 Lost in Paris
 Love and Lithium
 Love Me or Leave Me
 Love, Simon
 Loveless
 Loving
 Loving Couples
 Loving Vincent
 Lucky
 Lunchbox, The
 Lure, The
 Mad to be Normal
 Madame X
 Madeline's Madeline
 Madrid Era Una Fiesta
 Maggie's Plan
 Magic Flute, The
 Magic Medicine
 Magnificent Ambersons, The
 Maltese Falcon, The
 Mamma Mia
 Mamma Mia Singalong
 Mamma Mia: Here We Go
 Again
 Man and Beyond
 Man Behind the Microphone,
 The
 Man Called Ove, A
 Man from Mo'Wax, The
 Manchester by the Sea
 Mandy
 Manon of the Spring
 Manufactured Landscapes
 Margin Call
 Marie Antoinette
 Marjorie Prime
 Marlina the Murderer in Four
 Acts
 Marriage of Figaro, The
 Mars Attacks!
 Martian, The
 Mary and the Witch's Flower
 Mary Poppins Returns
 Mary Queen of Scots
 Mask, The
 Matangi / Maya / MIA
 Matilda
 Matter of Life and Death, A
 Maudie
 McQueen
 Meet Me In St Louis
 Meeting Gorbachev
 Menashe
 Mercy, The
 Metropolis
 Mexican Suitcase, The
 mid90s
 Midnight in Paris
 Midwife, The
 Mildred Pierce
 Million Ways to Die in the
 West, A
 Millions Like Us
 Milou in May
 Mimosas
 Miracle on 34th Street
 Miriam Miente
 Miseducation of Cameron
 Post, The
 Miserables, Les
 Miss Peregrine's Home for
 Peculiar Children
 Miss Sloane
 Moana
 Modern Times
 Molly's Game
 Momma Don't Allow
 Monsters, Inc
 Moolaade
 Moonlight
 Moonrise Kingdom
 Mother!
 Moulin Rouge
 Mountain
 Mountain Between Us, The
 Mountains May Depart
 Mrs Brown
 Mulan
 Murder on the Orient
 Express
 Mustang
 My Blind Date with Life
 My Cousin Rachel
 My Fair Lady
 My Generation
 My Life as a Courgette
 My Name is Khan
 My Neighbour Totoro
 Nae Pasaran
 Naked
 Nativity!
 Natural Born Killers
 Ne Le Dis a Personne
 Night Moves
 Night to Remember, A
 Nightmare Before Christ-
 mas, The
 Nile Hilton Incident, The
 No Blade of Grass
 No Man's Land
 Norma
 Nostalgia for the Light
 Nurse Edith
 Nut Job 2
 O Brother, Where Art Thou
 Ocean's Eight
 Of Love and Law
 Of Time and the City
 Officer and a Gentleman, An
 Oh! What a Lovely War
 Oklahoma
 Old Man & The Gun, The
 Olive Tree, The
 On Body and Soul
 On Chesil Beach
 On Her Shoulders
 On the Basis of Sex
 One Flew Over the Cuckoo's
 Nest
 One Note at a Time
 Oor Selfie
 Open Range
 Ornithologist, The
 Orphanage, The
 Other Side of Hope, The
 Other Side with Valerie
 Hope, The
 Our Kind of Traitor
 Our Last Tango
 Our Little Sister
 Out of Africa
 Oxide Ghosts
 Pad Man
 Paddington 2
 Pan's Labyrinth
 Paris, Texas
 Partie de Campagne
 Party, The
 Passion, The
 Passport to Pimlico
 Peddler, The
 Peter Rabbit
 Peterloo
 Phantom of the Paradise
 Phantom Thread
 Philadelphia Story, The
 Philomena
 Pigeongrove
 Pilgrim, The
 Pin Cushion
 Pink Panther
 Pioneers, The
 Pique Dame
 Pirates of Sale
 Polar Express
 Polvere Siamo
 Polyester
 Post, The
 Prep and Landing
 Prevenge
 Pride
 Prince of Nothingwood
 Princess Bride, The
 Priscilla, Queen of the
 Desert
 Private War, A
 Producers, The
 Prophet, A
 Pulp Fiction
 Queen Christina
 Queen of Katwe
 Quiet Place, A
 Rafiki
 Raging Bull
 Railway Man, The
 Ralph Breaks the Internet
 Rams
 Rape of Recy Taylor, The
 Ready Player One
 Rear Window
 Rebelove
 Red Turtle, The
 Redoubtable
 Return of the Hero
 Revenge
 RGB
 Rider, The
 Rigoletto in Mantua
 Riot Club, The
 Road to Mandalay, The
 Rocky Horror Show, The
 Rogue One
 Rojo
 Roman Holiday
 Runaway Train
 Rust and Bone
 Salesman, The
 Salmon Fishing in the
 Yemen
 Salut, Cousin!
 Sami Blod
 Samsara
 Samurai Cop
 Saturday Night and Sunday
 Morning
 Saving Grace
 Say My Name
 Scarecrow
 School for Scoundrels
 Scribe
 Scrooge
 Scrooged
 Seagull, The
 Searching
 Selfish Giant, The
 Selma
 Sembene
 Sense of an Ending, The
 Sequins
 Seven Brides for Seven
 Brothers
 Shame
 Shape of Water, The
 Shepherd, The
 Sherlock Gnomes
 Sherlock Jr
 Shining, The
 Shipping Forecast, The
 Shiraz
 Shootist, The
 Shoplifters
 Shot Caller
 Shouf Shouf Habibi
 Should Men Walk Home?
 Shoulder Arm
 Shut Up and Play the Piano
 Sicilian Ghost Story
 Sideways
 Silas
 Silver Linings Playbook
 Simon Boccanegra
 Simple Favour, A
 Sing
 Sing Street
 Singin' in the Rain
 Sisters Brothers, The
 Sixth Side of the Pentagon,
 The
 Skate Kitchen
 Skin I Live In, The
 Sleeping Beauty
 Smallfoot
 Smiles of a Summer Night
 Solo
 Solo: A Star Wars Story
 Some Like It Hot
 Sondheim's Follies
 Sonic Silents: The Pitch o'
 Chance
 Sorcerer
 Sorry to Bother You
 Sound of Music, The
 South Pacific
 Soy Cuba
 Spiderman
 Spiderman: Into the Spi-
 derverse
 Spirited Away
 Spitfire
 Square, The
 Stalker
 Stan and Ollie
 Star is Born, A
 Stop Making Sense
 Stopgap in Stop Motion
 Straw Dogs
 Street Cat Named Bob, A
 Suffragette
 Sully
 Summer
 Summer 1993
 Summer Hours
 Summer in February
 Summer in the Forest
 Sunset Boulevard
 Suspiria
 Suzanne
 Sweet Bean
 Sweet Country
 Swimming with Men
 Tabu
 Tale of a Sickly Whale, A
 Tampopo
 Tangerines
 Taste of Honey, A
 Taxi Tehran
 Tehran Taboo
 Tell it to the Bees
 Testament of Youth
 Texas Chainsaw Massacre
 That Sinking Feeling
 That's Entertainment
 Theeb
 Their Finest
 Thelma
 Thelma and Louise
 Theory of Everything, The
 They Shall Not Grow Old
 Thing, The
 Third Murder, The
 This is Spinal Tap
 Thoroughbreds
 Threads
 Three Billboards Outside of
 Ebbings, Missouri
 Three Identical Strangers
 Throne of Blood
 Time and Dine
 Time of their Lives, The
 To Be or Not To Be
 To Sir with Love
 Todo Sobre mi Madre
 Tokyo Story
 Toni Erdmann
 Tosca
 Town Called Panic, A
 Toy Story
 Toy Story 4
 Travelling with Chaplin
 Traviata, La
 Tristitia
 Trolls
 Trovatore, Il
 Truman
 Truman Show, The
 Trumbo
 TT - Closer to the Edge
 Tully
 Tunnel
 Two days, One Night
 Two for the Road
 Tyrannosaur
 Umbrellas of Cherbourg,
 The
 Un Ballo in Maschera
 Un Chien Andalou
 Under the Tree
 United Kingdom, A
 Unknown Girl
 Up
 Upgrade
 V for Vendetta
 Vanishing Point
 Venom
 Vertigo
 Very Long Engagement, A
 Vice
 Viceroy's House
 Victoria
 Victoria & Abdul
 Videodrome
 Volver
 Vote 100
 Wadjda
 Wages of Fear, The
 Wajib
 Walk in the Woods, A
 Walkabout
 Wall-E
 War Horse
 War of the Planet of the
 Apes
 War of the Worlds
 Waru
 Watermelon Woman, The
 We Need to Talk About
 Death
 We Need to Talk about
 Kevin
 Weekend
 Western
 What We Did on our Hol-
 idays
 Whitney
 Wicker Man, The
 Widows
 Wife, The
 Wild
 Wild Pear Tree, The
 Wild Rose
 Wildlife
 Wind River
 Wipers Times, The
 Witches, The
 Withnail & I
 Witness for the Prosecution
 Wizard of Oz, The
 Wolf House, The
 Woman at War
 Woman in Gold
 Woman in the Moon
 Woman's Life, A
 Women of the Gulag
 Women Over Fifty Film
 Festival: Best of the Fest
 Wonder
 Wonderstruck
 Won't You Be My Neighbor?
 Wound, The
 Wreck it Ralph II
 Wrecking Season, The
 Yardie
 Yellow Submarine
 Yesterday and Tomorrow
 You Were Never Really Here
 Young Frankenstein
 Young Offenders, The
 Your Name
 Zama
 Zookeeper's Wife, The
 Zootropolis