# EXHIBITION

## BFI Research and Statistics

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Image: *Wadjda* courtesy of Soda Pictures

# EXHIBITION

THE OVERALL NUMBER OF SCREENS IN THE UK CONTINUES TO RISE, MAINLY DUE THE INCREASING NUMBER OF MULTIPLEX CINEMAS. HOWEVER, AUGMENTING COMMERCIAL CINEMA IS A THRIVING VOLUNTARY SECTOR IN FILM EXHIBITION, AND FILM SOCIETY ADMISSIONS ARE HIGHEST IN AREAS LESS WELL SERVED BY COMMERCIAL CINEMAS.

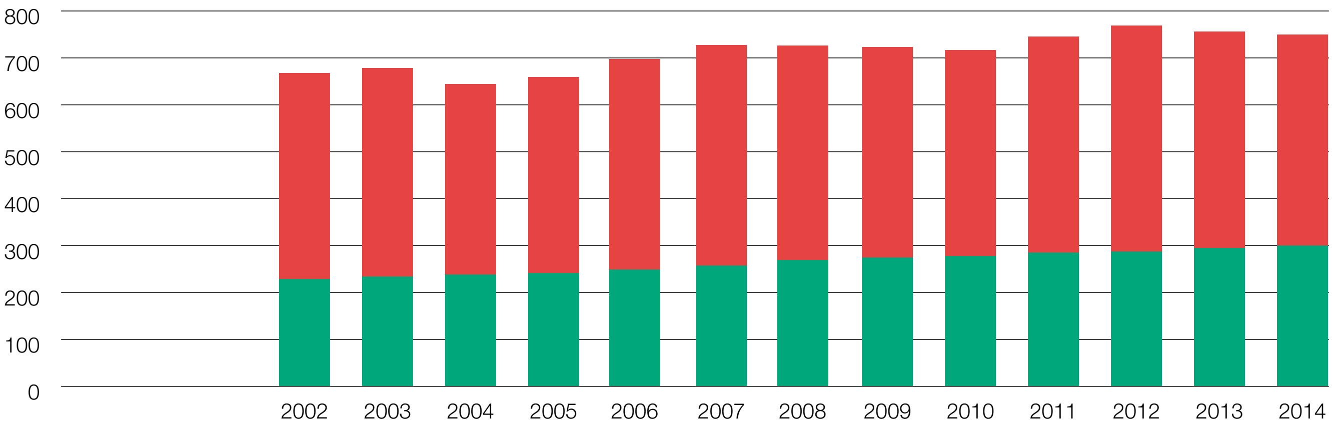
## FACTS IN FOCUS

- At the end of 2014, the UK had 3,909 screens, 42 more than 2013, in 750 cinemas.
- There were just over six screens for every 100,000 people, the same as in 2013.
- Only 7% of screens showed mainly 'specialised' (ie non-mainstream) programming, with 0.1% dedicated to South Asian films.
- According to IHS all screens in the UK are now equipped for digital projection.
- Just over one third (36%) of community cinemas, which responded to the latest Cinema For All annual survey, saw an increase in their annual admissions compared with 2012/13; 49% recorded roughly the same number.
- The average ticket price at commercial cinemas was £6.72.

## UK CINEMA SITES

Figure 1.1 shows the number of cinema sites in the UK from 2002 to 2014. The total number of sites has fluctuated over the period with a low of 644 in 2004 and a high of 769 in 2012. There were 750 cinemas in the UK in 2014. This fluctuation has mainly been driven by the changes in the number of traditional and mixed use sites (mixed use screens are used for film screenings only part of the time). The number of these sites has decreased from a high point of 481 in 2012 to 449 in 2014. The number of purpose-built multiplex sites, however, has steadily risen from 229 in 2002 to 301 in 2014. Multiplexes made up 40% of all cinema sites in 2014.

### Figure 1.1 UK cinema sites by type of site, 2002-2014




| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Multiplex | 229 | 234 | 238 | 242 | 249 | 258 | 269 | 275 | 278 | 285 | 288 | 295 | 301 |
| Traditional and mixed use | 439 | 444 | 406 | 417 | 448 | 469 | 457 | 448 | 438 | 460 | 481 | 461 | 449 |
| **Total sites** | **668** | **678** | **644** | **659** | **697** | **727** | **726** | **723** | **716** | **745** | **769** | **756** | **750** |
| % multiplex sites | 34 | 35 | 37 | 37 | 36 | 35 | 37 | 38 | 39 | 38 | 37 | 39 | 40 |

Source: Dodona Research, BFI RSU analysis

Notes:

Data on cinema sites before 2002 are not available.

Multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites.

## UK SCREENS

As Figure 1.2 shows, the total number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) has risen every year since 1999. Due to increases in the number of multiplex screens, in 2014 the total number of screens stood at 3,909, a rise of 42 compared with 2013.

The UK has gained 1,335 multiplex screens (see definition in the note to Figure 1.1) since 1999 and lost 184 traditional or mixed use screens. The percentage of multiplex screens increased from 59% in 1999 to 75% in 2009, and this proportion has been maintained since then.

### Figure 1.2 UK cinema screens by type of cinema, 1999-2014


| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Multiplex | 1,624 | 1,874 | 2,115 | 2,299 | 2,362 | 2,426 | 2,453 | 2,512 | 2,578 | 2,689 | 2,735 | 2,767 | 2,833 | 2,851 | 2,915 | 2,959 |
| Traditional and mixed use | 1,134 | 1,080 | 1,049 | 959 | 956 | 916 | 904 | 928 | 936 | 921 | 916 | 904 | 934 | 966 | 952 | 950 |
| **Total screens** | **2,758** | **2,954** | **3,164** | **3,258** | **3,318** | **3,342** | **3,357** | **3,440** | **3,514** | **3,610** | **3,651** | **3,671** | **3,767** | **3,817** | **3,867** | **3,909** |
| % multiplex screens | 58.9 | 63.4 | 66.8 | 70.6 | 71.2 | 72.6 | 73.1 | 73.0 | 73.4 | 74.5 | 74.9 | 75.4 | 75.2 | 74.7 | 75.4 | 75.7 |

Source: Dodona Research, BFI RSU analysis
See notes to Figure 1.1.

## SCREEN LOCATION

In 2014, 97% of all screens in the UK were located in town or city centres, edge of centre, 'out of town' or suburban locations.

Table 1.1 shows suburban and rural cinemas tend to have fewer screens on average than their urban counterparts, although town and city centre sites are also relatively small. In 2014, there was one screen fewer in suburban locations, compared with 2013, and five fewer screens in rural locations, but an increase in the numbers of screens in the other locations.

### Table 1.1 Screens by location, 2003-2014

| Location | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | % change 2013-2014 | Average no. of screens per site |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Town/city centre | 1,470 | 1,502 | 1,495 | 1,555 | 1,616 | 1,683 | 1,732 | 1,726 | 1,785 | 1,848 | 1,866 | 1,901 | 1.9 | 4.1 |
| Out of town | 1,234 | 1,243 | 1,250 | 1,262 | 1,284 | 1,303 | 1,297 | 1,311 | 1,335 | 1,310 | 1,328 | 1,335 | 0.5 | 9.7 |
| Edge of centre | 464 | 465 | 479 | 478 | 486 | 499 | 498 | 506 | 518 | 523 | 534 | 540 | 1.1 | 9.0 |
| Suburban | 33 | 33 | 38 | 40 | 30 | 30 | 27 | 28 | 28 | 27 | 26 | 25 | -3.8 | 1.9 |
| Rural | 117 | 99 | 95 | 105 | 98 | 95 | 97 | 100 | 101 | 109 | 113 | 108 | -4.4 | 1.5 |
| **Total** | **3,318** | **3,342** | **3,357** | **3,440** | **3,514** | **3,610** | **3,651** | **3,671** | **3,767** | **3,817** | **3,867** | **3,909** | **1.1** | **5.2** |

Source: Dodona Research, BFI RSU analysis

## SCREEN DENSITY AND ADMISSIONS PER PERSON

A standard way to gauge the level of cinema provision is by 'screen density', ie the number of screens per unit of population. According to IHS, in 2014 the UK had 6.1 screens per 100,000 people, the same as in 2013. However, the average admissions per person was 2.4, compared with 2.6 in 2013.

As in previous editions of the Yearbook we are able to present screen provision data based on two types of regional classification. The datasets are not directly comparable because of differences in the way the regions are defined; they do, however, shed light on different aspects of national and regional variation in screen provision.

The Cinema Advertising Association produces monthly admissions totals for each of the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). Screen and admissions data for 2014 using these television regions are presented in Table 1.2. The population estimates for the ISBA regions are based on 2011 census data and so the UK total shown in the Table is lower than the UK population shown in Table 1.3 which is the official mid-2013 population estimate. The lower UK population total figure shown in Table 1.2 also results in the figures for screen density and admissions per person shown in the Table being higher than the corresponding IHS estimates.

Although London had the highest numbers of screens and sites, its screen density, at 6.7 screens per 100,000 people, was lower than that of Northern Ireland (10.8) and Central Scotland (6.8) and only slightly higher than the Wales and West (6.6) and South West (6.4) ISBA regions. The North East had the lowest screen density (4.6) among all ISBA regions.

**Table 1.2 Screens and admissions by ISBA TV region, 2014 (ranked by screens per 100,000 people)**

| ISBA TV region | Screens per 100,000 people | Screens | % of total screens | Sites | Population (000)* | Admissions (000) | Admissions per screen | Admissions per person |
|---|---|---|---|---|---|---|---|---|
| Northern Ireland | 10.8 | 194 | 5.0 | 27 | 1,798 | 5,604 | 28,885 | 3.1 |
| Central Scotland | 6.8 | 246 | 6.3 | 38 | 3,626 | 10,521 | 42,769 | 2.9 |
| London | 6.7 | 866 | 22.2 | 155 | 12,898 | 40,135 | 46,345 | 3.1 |
| Wales and West | 6.6 | 322 | 8.2 | 75 | 4,876 | 11,226 | 34,864 | 2.3 |
| South West | 6.4 | 117 | 3.0 | 37 | 1,836 | 3,786 | 32,361 | 2.1 |
| Northern Scotland | 6.2 | 80 | 2.0 | 20 | 1,296 | 3,547 | 44,332 | 2.7 |
| Southern | 6.2 | 347 | 8.9 | 83 | 5,629 | 14,268 | 41,119 | 2.5 |
| Lancashire | 6.1 | 438 | 11.2 | 62 | 7,151 | 15,282 | 34,891 | 2.1 |
| Midlands | 5.7 | 581 | 14.9 | 105 | 10,133 | 21,987 | 37,843 | 2.2 |
| East of England | 5.5 | 235 | 6.0 | 53 | 4,299 | 10,918 | 46,458 | 2.5 |
| Border | 5.4 | 33 | 0.8 | 16 | 610 | 1,178 | 35,701 | 1.9 |
| Yorkshire | 5.3 | 317 | 8.1 | 54 | 5,980 | 12,858 | 40,561 | 2.2 |
| North East | 4.6 | 133 | 3.4 | 25 | 2,913 | 6,190 | 46,543 | 2.1 |
| **Total** | **6.2** | **3,909** | **100.0** | **750** | **63,044** | **157,500** | **40,292** | **2.5** |

Source: Dodona Research, Beacon Dodsworth, Cinema Advertising Association (CAA), BFI RSU analysis
Notes:
* Beacon Dodsworth population estimates based on Census data 2011, and so the UK total is lower than the UK population shown in Table 4 which is the official mid-2013 population estimate.
Figures may not sum to totals due to rounding.

Table 1.3 gives screen information for each of the English regions, plus Scotland, Wales and Northern Ireland.

Northern Ireland had the highest number of screens per 100,000 people in 2014 (10.6), followed by London (7.4) and Wales (6.6). The average number of screens per 100,000 people for England as a whole was 5.2.

**Table 1.3 Screens and population in the nations and regions, 2014 (ranked by screens per 100,000 people)**

| Nation/region | Screens | % of total screens | Sites | Population (000)* | Screens per 100,000 people | Average number of screens per site |
|---|---|---|---|---|---|---|
| Northern Ireland | 194 | 5.0 | 27 | 1,830 | 10.6 | 7.2 |
| London | 623 | 15.9 | 109 | 8,417 | 7.4 | 5.7 |
| Wales | 202 | 5.2 | 52 | 3,082 | 6.6 | 3.9 |
| South East | 567 | 14.5 | 125 | 8,793 | 6.4 | 4.5 |
| South West | 346 | 8.9 | 86 | 5,378 | 6.4 | 4.0 |
| Scotland | 336 | 8.6 | 64 | 5,328 | 6.3 | 5.3 |
| North West | 441 | 11.3 | 65 | 7,103 | 6.2 | 6.8 |
| West Midlands | 324 | 8.3 | 56 | 5,675 | 5.7 | 5.8 |
| Yorkshire and The Humber | 273 | 7.0 | 46 | 5,338 | 5.1 | 5.9 |
| North East | 128 | 3.3 | 22 | 2,610 | 4.9 | 5.8 |
| East Midlands | 211 | 5.4 | 40 | 4,599 | 4.6 | 5.3 |
| East of England | 246 | 6.3 | 53 | 5,954 | 4.1 | 4.6 |
| Others** | 18 | 0.5 | 5 | n/a | n/a | 3.6 |
| **Total** | **3,909** | **100.0** | **750** | **64,106** | **6.1** | **5.2** |

Source: Dodona Research, Office for National Statistics (ONS), BFI RSU analysis
Notes:
* ONS Mid-year population estimates 2013.
** Others include the Channel Islands and the Isle of Man.
n/a = not available.
Figures may not sum to totals due to rounding.

Table 1.3 also shows that Northern Ireland and the North West had the highest averages for screens per site at 7.2 and 6.8 respectively. The South West and Wales along with 'others' (which include the Channel Islands and the Isle of Man) had the lowest averages for screens per site showing a tendency towards smaller cinemas and, particularly for the South West and others, proportionally fewer multiplex screens (Table 1.4).

## TYPE OF CINEMA SCREENS BY NATION AND REGION

Table 1.4 provides a snapshot of variations in multiplex provision around the UK. London had the largest number of multiplex screens (420) in 2014, 10 more than the South East. Northern Ireland had the highest proportion of multiplex screens (91%) followed by the North West and North East. In England the lowest concentration of multiplex screens was found in the South West (59%), which had a high number of traditional and mixed use screens (the third highest after London and the South East). London had the highest number of both multiplex and traditional screens but its percentage of multiplex screens, at 67%, was the second lowest in England. The proportion of multiplex screens for England as a whole was 75%.

**Table 1.4 Cinema screens by type by nation or region, 2014 (ranked by percentage multiplex)**

| Nation/region | Multiplex | % multiplex | Traditional and mixed use | Total |
|---|---|---|---|---|
| Northern Ireland | 177 | 91.2 | 17 | 194 |
| North West | 393 | 89.1 | 48 | 441 |
| North East | 110 | 85.9 | 18 | 128 |
| Yorkshire and The Humber | 225 | 82.4 | 48 | 273 |
| East Midlands | 167 | 79.1 | 44 | 211 |
| West Midlands | 251 | 77.5 | 73 | 324 |
| Scotland | 257 | 76.5 | 79 | 336 |
| East of England | 184 | 74.8 | 62 | 246 |
| Wales | 151 | 74.8 | 51 | 202 |
| South East | 410 | 72.3 | 157 | 567 |
| London | 420 | 67.4 | 203 | 623 |
| South West | 204 | 59.0 | 142 | 346 |
| Others* | 10 | 55.6 | 8 | 18 |
| **Total** | **2,959** | **75.7** | **950** | **3,909** |

Source: Dodona Research, BFI RSU analysis
* Others include the Channel Islands and the Isle of Man.

## MAINSTREAM, SPECIALISED AND SOUTH ASIAN PROGRAMMING

Dodona Research categorises screens according to whether they show mostly mainstream, specialised (ie non-mainstream, including 'arthouse') or South Asian films.

Table 1.5 shows that by far the majority of screens primarily show mainstream films. In 2014, 583 cinemas with 3,630 screens showed mostly mainstream films (a 1% decrease in the number of sites and a 1% increase in the number of screens compared with 2013). There were 165 sites (with 275 screens, 7% of screens) showing mainly specialised films and two cinemas (with four screens, 0.1% of screens) dedicated mainly to South Asian films. The number of screens showing mostly specialised films increased by 4% in 2014 compared with 2013, but the number of sites decreased by 2%.

**Table 1.5 Sites and screens by programme, 2005-2014**

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | **Sites** | | | | | |
| Programme | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
| South Asian | 5 | 5 | 4 | 4 | 4 | 3 | 3 | 3 | 2 | 2 |
| Specialised | 132 | 157 | 177 | 168 | 168 | 163 | 171 | 177 | 168 | 165 |
| Mainstream | 522 | 535 | 546 | 554 | 551 | 550 | 571 | 589 | 586 | 583 |
| **Total** | **659** | **697** | **727** | **726** | **723** | **716** | **745** | **769** | **756** | **750** |
| | | | | | **Screens** | | | | | |
| Programme | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
| South Asian | 18 | 18 | 10 | 10 | 10 | 7 | 7 | 7 | 4 | 4 |
| Specialised | 206 | 231 | 255 | 250 | 253 | 248 | 259 | 268 | 265 | 275 |
| Mainstream | 3,133 | 3,191 | 3,249 | 3,350 | 3,388 | 3,416 | 3,501 | 3,542 | 3,598 | 3,630 |
| **Total** | **3,357** | **3,440** | **3,514** | **3,610** | **3,651** | **3,671** | **3,767** | **3,817** | **3,867** | **3,909** |

Source: Dodona Research, BFI RSU analysis

The majority (72%) of specialised screens were found in single, independent cinemas (ie not part of a chain). The percentage is higher than in 2013, when 64% of specialised screens were based in independent cinemas.

The pattern of programme type by location in 2014 is shown in Table 1.6. Screens showing mostly South Asian films were located in town or city centres and suburban areas, while those devoted to specialised film were mainly found in town or city centres. The overall pattern remained similar to earlier years.

**Table 1.6 Percentages of screens by location and programme, 2014**

| Location | Mainstream | Specialised | South Asian | Total |
|---|---|---|---|---|
| Town/city centre | 45.8 | 86.5 | 50.0 | 48.6 |
| Out of town | 36.6 | 2.2 | - | 34.2 |
| Edge of centre | 14.8 | 1.5 | - | 13.8 |
| Suburban | 0.4 | 2.9 | 50.0 | 0.6 |
| Rural | 2.5 | 6.9 | - | 2.8 |
| **Total** | **100.0** | **100.0** | **100.0** | **100.0** |

Source: Dodona Research, BFI RSU analysis
Note: Percentages may not sum to totals due to rounding.

This geographical analysis is extended in Table 1.7, which shows the distribution of specialised screens around the UK. Screens showing mainly specialised films were concentrated in London and the South East, which jointly accounted for 45% of the UK total in 2014. Scotland and the South West both had 26 specialised screens, accounting for 10% each of such screens. Northern Ireland (0.7%), the North East (2.2%) and Wales (3.6%) had the smallest percentages of specialised screens.

The four screens showing South Asian films were found in only two cinemas, one in London and the other in Leicester in the East Midlands.

**Table 1.7 Geographical spread of specialised screens, 2014**

| Nation/region | Specialised screens | % |
|---|---|---|
| London | 79 | 28.7 |
| South East | 44 | 16.0 |
| Scotland | 26 | 9.5 |
| South West | 26 | 9.5 |
| Yorkshire and The Humber | 22 | 8.0 |
| East of England | 19 | 6.9 |
| West Midlands | 16 | 5.8 |
| East Midlands | 14 | 5.1 |
| North West | 11 | 4.0 |
| Wales | 10 | 3.6 |
| North East | 6 | 2.2 |
| Northern Ireland | 2 | 0.7 |
| **Total** | **275** | **100.0** |

Source: Dodona Research, BFI RSU analysis

## EXHIBITORS

The number of exhibitors which owned or programmed 20 or more screens in the UK totalled 13 at the end of January 2015, as shown in Table 1.8. This is three more than at the end of January 2014: the newcomers to the list are the Everyman Media Group, Light Cinemas and Curzon Cinemas. The top 10 remain the same as a year earlier. At the start of 2015, the five largest exhibitors owned 74% of all UK screens (75% at the start of 2014).

### Table 1.8 Cinema screens by exhibitors with 20+ screens, 2014

| Exhibitor | Sites | Screens | % of total screens |
|---|---|---|---|
| Odeon | 113 | 879 | 22.5 |
| Cineworld | 81 | 813 | 20.8 |
| Vue | 82 | 780 | 20.0 |
| National Amusements | 20 | 264 | 6.8 |
| Empire Cinemas | 17 | 167 | 4.3 |
| Omniplex | 10 | 82 | 2.1 |
| Reel Cinemas | 15 | 62 | 1.6 |
| Cineworld/Picturehouse | 21 | 58 | 1.5 |
| Movie House Cinemas | 5 | 39 | 1.0 |
| Merlin Cinemas | 11 | 35 | 0.9 |
| Everyman Media Group | 12 | 23 | 0.6 |
| Light Cinemas | 3 | 23 | 0.6 |
| Curzon Cinemas | 9 | 21 | 0.5 |
| Others (19 major exhibitors and 290 independent single venue exhibitors) | 351 | 663 | 17.0 |
| **Total** | **750** | **3,909** | **100.0** |

Source: Dodona Research

Notes:

Figures correct as at January 2015.

Percentages may not sum to 100 due to rounding.

The Odeon chain was owned by Terra Firma Capital Partners, a European private equity firm.

Cineworld was the only publicly-quoted exhibitor in the UK. It was formed in 1995 and acquired the former Cine-UK and UGC chains in 2004. It also acquired Picturehouse in 2012.

Vue, which acquired Warner Village cinemas in 2003 and the Apollo cinema chain in 2012, was sold to Canadian investors Omers Private Equity and Alberta Investment Management in 2013.

National Amusements was owned by the family of Sumner Redstone, chairman of US media giant Viacom.

The Everyman Media Group was founded in 2000. The company made its debut on the Alternative Investment Market (AIM) in November 2013.

## EXHIBITOR REVENUES

Dodona Research reports that exhibitors' revenues from refreshment sales were £292.9 million in 2014, a 3% decrease from 2013's £302.9 million. However, other income, which includes advertising income, booking fees, sales of 3D glasses and auditorium rental, increased by 15% between 2013 and 2014, from £79.5 million to £91.4 million.

The top five exhibitors had an 81% share of gross box office in the UK and Republic of Ireland in 2014, and 72% of the box office was shared between the top three exhibitors (Table 1.9).

Average ticket prices, calculated by dividing the UK-only box office gross for the year (£1,058 million) by total UK admissions (157.5 million), rose from £6.54 in 2013 to £6.72 in 2014, an increase of 3%.

### Table 1.9 Exhibitor share of box office in the UK and Republic of Ireland, 2014

| Exhibitor | Market share (%) | Box office gross (£ million) |
|---|---|---|
| Cineworld | 26.7 | 305.4 |
| Odeon | 23.3 | 266.5 |
| Vue | 21.5 | 245.9 |
| National Amusements | 5.8 | 66.3 |
| Empire Cinemas | 3.8 | 43.5 |
| Sub-total | 81.1 | 927.5 |
| Others | 18.9 | 216.2 |
| **Total** | **100.0** | **1,143.7** |

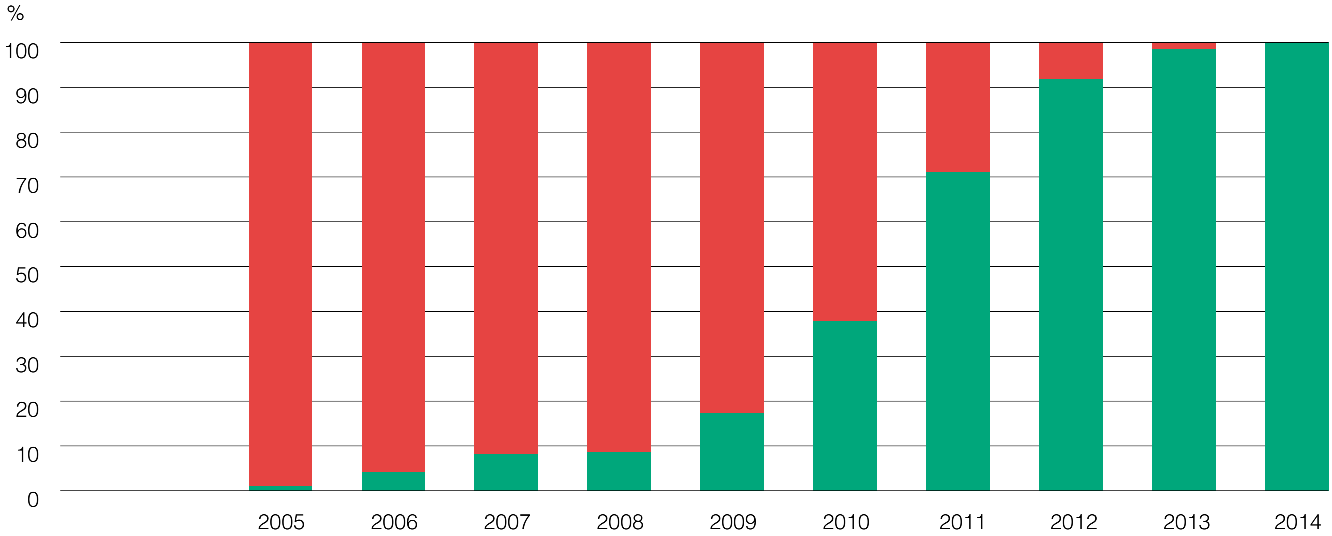
Source: Dodona Research and Rentrak
Note: Figures may not sum to total/sub-total due to rounding.

## DIGITAL PROJECTION

## DIGITAL SCREENS

According to IHS, the number of digital screens in the UK increased by 3% (to 3,946[1]) between 2013 and 2014, so that by the end of the year all screens in the UK were equipped for digital projection. Figure 1.3 shows the percentage of digital screens in the UK since 2005.

**Figure 1.3 Percentage of digital screens, 2005-2014**




| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|---|---|---|---|---|---|---|---|---|
| Analogue | 98.9 | 95.9 | 91.8 | 91.5 | 82.6 | 62.2 | 29.0 | 8.3 | 1.6 | 0.0 |
| Digital | 1.1 | 4.1 | 8.2 | 8.5 | 17.4 | 37.8 | 71.0 | 91.7 | 98.4 | 100.0 |

Source: IHS

## ACCESSIBLE CINEMA

All digitally-equipped UK cinemas now have English language subtitle/caption and audio description (ST/AD) facilities. Almost every multiplex cinema and many smaller cinemas regularly screen the latest popular releases with on-screen English language captions. Around 1,200 such screenings are provided weekly, by more than 40 exhibitors, in around 400 cinemas nationwide (more than half the total), including around 90% of multiplex cinemas. Due to the expansion of digital cinema, the last five years has seen the weekly number of captioned screenings increase by around 120%, to more than 60,000 annually. In 2014, almost 400,000 people attended captioned shows, generating more than £2.5 million at the box office.

Data from 'YourLocalCinema.com' show that, in 2014, 181 English-language films were shown in UK cinemas with captions (98% of wide release titles), and 157 were shown with audio description (85% of wide release titles).

Over the last decade more than 1,000 titles have been made available, including almost all of the top 10 films of each year. All of the top 20 films at the UK box office in 2014 had ST/AD tracks.

[1] The number of digital screens shown here is greater than the total number of screens shown in Figure 1.2. The two numbers are from different sources (Dodona Research and IHS) and refer to slightly different times.

## 3D AND EVENT CINEMA

According to IHS, of the 3,946 digital screens in the UK at the end of 2014, 1,772 (45%) were 3D-capable digital screens. Some of the popular 3D screenings in 2014 included *The Hobbit: The Battle of the Five Armies, The Lego Movie, Dawn of the Planet of the Apes* and *Guardians of the Galaxy.*

Table 1.10 shows the increasing number of 3D digital screens in the UK. The growth in such screens coincided with an increase in the availability of 3D content internationally. Eight more 3D films were released in 2014 than in 2013 (46 in 2013 and 54 in 2014), and these included 11 of the year's top 20 films.

**Table 1.10 3D digital screens in the UK, 2006-2014**

| Year | Number of 3D digital screens | Total digital screens | 3D % of all digital screens | Top performing digital 3D title in the UK and Republic of Ireland |
|---|---|---|---|---|
| 2006 | 5 | 148 | 3.4 | Tim Burton's The Nightmare Before Christmas 3-D |
| 2007 | 47 | 296 | 15.9 | Beowulf |
| 2008 | 69 | 310 | 22.3 | Fly Me to the Moon |
| 2009 | 449 | 642 | 69.9 | Avatar |
| 2010 | 1,067 | 1,415 | 75.4 | Toy Story 3 |
| 2011 | 1,475 | 2,714 | 54.3 | Harry Potter and the Deathly Hallows: Part 2 |
| 2012 | 1,564 | 3,538 | 44.2 | The Hobbit: An Unexpected Journey |
| 2013 | 1,655 | 3,868 | 42.8 | Gravity |
| 2014 | 1,772 | 3,946 | 44.9 | The Hobbit: The Battle of the Five Armies |

Source: IHS, Rentrak, BFI RSU analysis
Notes:
3D digital screens are capable of screening content made in stereoscopic 3D format.
Top performing digital 3D titles in the UK and Republic of Ireland are based on takings from 3D and IMAX 3D screenings.

Event cinema, alternative content or non-feature film programming has become a regular feature over recent years in the UK due to the increase in digital screens. The availability of a digital screen base has widened the range of content on the big screen, allowed for greater interactivity between the screen and the audience and has potentially improved the use of auditorium capacity during typically quiet periods. Also, since events usually have only one or two screenings they can often generate higher occupancy rates than feature films. Event cinema is becoming increasingly popular and the box office takings from events screened in 2014 was almost twice that from events screened in 2013.

Table 1.11 shows the numbers of events and box office takings by type of event screened in 2014. According to Rentrak there were 128 events screened in 2014 (111 in 2013) which took a total of £33.6 million at the box office (£18.7 million in 2013). Opera has proved consistently popular since alternative content events were first screened, and in 2014 more operas were screened (38) than any other single type of event, generating a total box office of £5.4 million. Opera was second in the box office rankings, however, behind theatre, which took £13.7 million from 27 events. The difference in total box office from theatre events and operas could be at least partly explained by the higher average WPR for theatre (248 for theatre and 123 for opera). The most popular event screened in UK cinemas in 2014 was *Billy Elliot the Musical – Live,* which took £1.9 million at the box office, a record gross for event cinema in the UK. The live stream, which was screened at 553 locations (the UK's widest ever live event release), was also the first alternative content screening to top the weekend box office.

Fourth in both numbers of events and in box office takings was ballet with 14 events (with performances from the Royal Ballet, the Bolshoi, Opera de Paris and the Mariinsky Theatre), which generated £4.1 million at the box office.

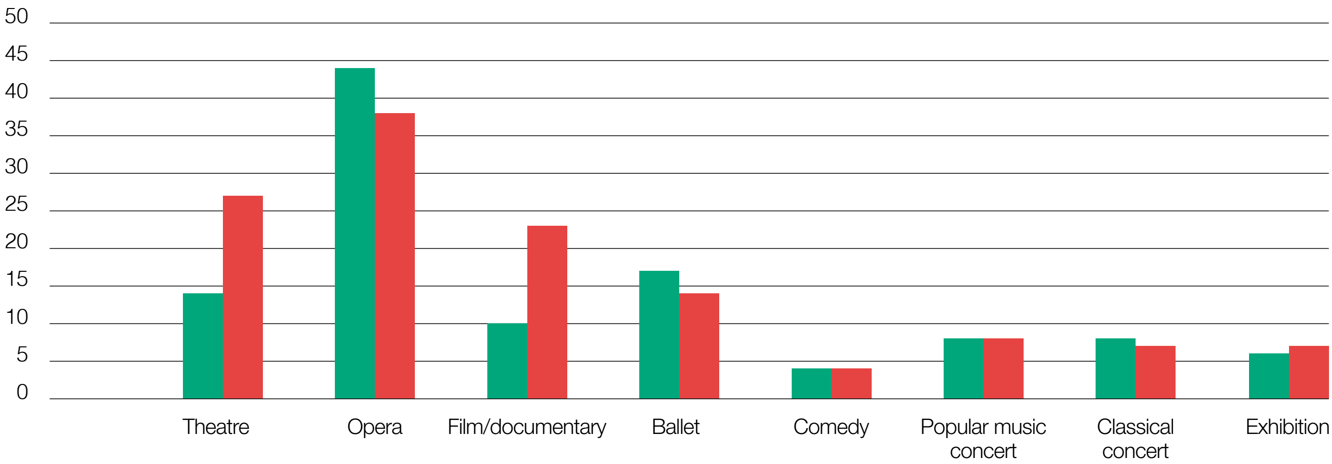
**Table 1.11 Numbers and box office takings of events screened in UK cinemas by type of event, 2014**

| Type of event | Number of events | % of events | Box office (£ million) | % box office | Average WPR |
|---|---|---|---|---|---|
| Theatre | 27 | 21.1 | 13.7 | 40.8 | 248 |
| Opera | 38 | 29.7 | 5.4 | 16.0 | 123 |
| Film/documentary | 23 | 18.0 | 4.8 | 14.3 | 69 |
| Ballet | 14 | 10.9 | 4.1 | 12.2 | 205 |
| Comedy | 4 | 3.1 | 1.8 | 5.5 | 245 |
| Popular music concert | 8 | 6.3 | 1.5 | 4.5 | 135 |
| Classical concert | 7 | 5.5 | 1.4 | 4.0 | 106 |
| Exhibition | 7 | 5.5 | 0.9 | 2.8 | 173 |
| **Total** | **128** | **100.0** | **33.6** | **100.0** | **155** |

Source: Rentrak
Note: Percentages may not sum to totals due to rounding.

Figure 1.4 shows the numbers of events by type of event in 2013 and 2014, and Figure 1.5 shows the box office takings by type of event in 2013 and 2014. The number of events increased by 15% from 2013 (111) to 2014 (128) but the box office takings increased by 80% (£18.7 million in 2013 and £33.6 million in 2014).

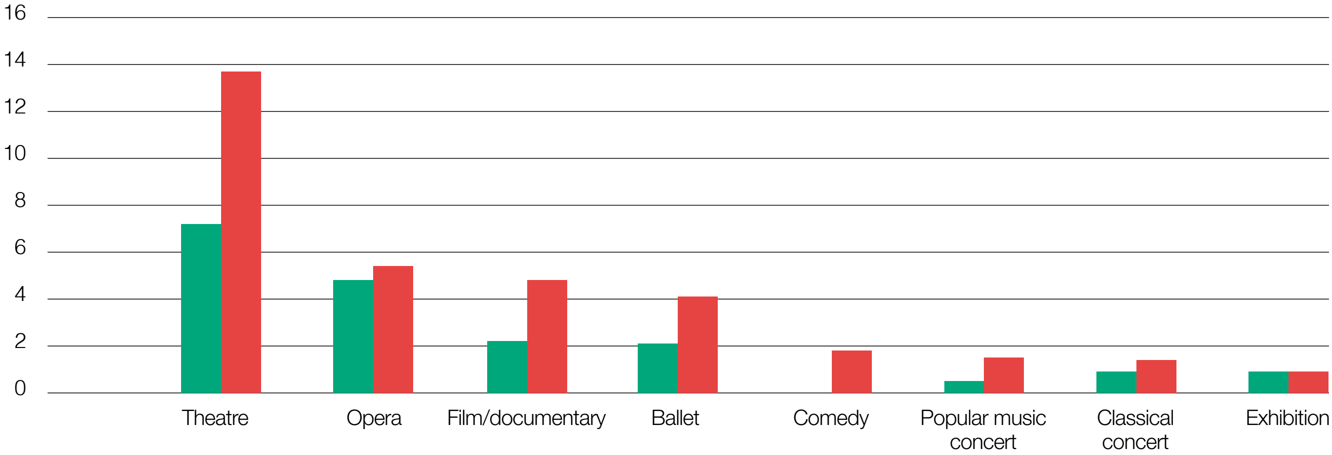
**Figure 1.4 Events screened in UK cinemas by type of event, 2013 and 2014**




| | Theatre | Opera | Film/documentary | Ballet | Comedy | Popular music concert | Classical concert | Exhibition |
|---|---|---|---|---|---|---|---|---|
| 2013 | 14 | 44 | 10 | 17 | 4 | 8 | 8 | 6 |
| 2014 | 27 | 38 | 23 | 14 | 4 | 8 | 7 | 7 |

Source: Rentrak

**Figure 1.5 Revenues from event cinema by type of event screened in UK cinemas, 2013 and 2014**

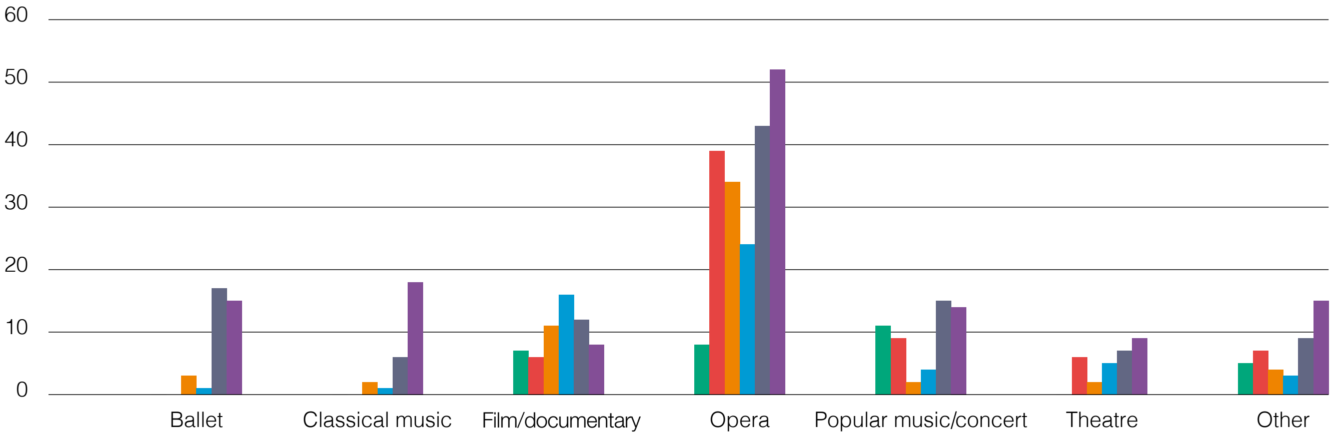



| | Theatre | Opera | Film/documentary | Ballet | Comedy | Popular music concert | Classical concert | Exhibition |
|---|---|---|---|---|---|---|---|---|
| 2013 | 7.2 | 4.8 | 2.2 | 2.1 | - | 0.5 | 0.9 | 0.9 |
| 2014 | 13.7 | 5.4 | 4.8 | 4.1 | 1.8 | 1.5 | 1.4 | 0.9 |

Source: Rentrak

As mentioned above, the data in Table 1.11 are from Rentrak, which now tracks box office receipts for events as well as for films. In previous editions of the Yearbook data on event cinema have been provided by IHS. Figure 1.6 shows the numbers of events, by type of event, from 2007 to 2012, using data from IHS. Because of methodological differences in data collection between IHS and Rentrak, the figures for 2013 and 2014 shown above are not included in the chart.

**Figure 1.6 Events screened in UK cinemas by type of event, 2007-2012**

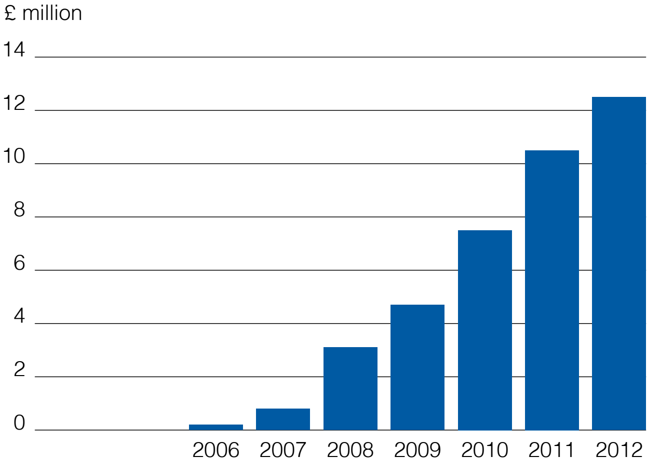



| | Ballet | Classical music | Film/documentary | Opera | Popular music/concert | Theatre | Other |
|---|---|---|---|---|---|---|---|
| 2007 | 0 | 0 | 7 | 8 | 11 | 0 | 5 |
| 2008 | 0 | 0 | 6 | 39 | 9 | 6 | 7 |
| 2009 | 3 | 2 | 11 | 34 | 2 | 2 | 4 |
| 2010 | 1 | 1 | 16 | 24 | 4 | 5 | 3 |
| 2011 | 17 | 6 | 12 | 43 | 15 | 7 | 9 |
| 2012 | 15 | 18 | 8 | 52 | 14 | 9 | 15 |

Source: IHS
Notes:
Figures include live and recorded events.
'Film' includes film screenings followed by a live 'question and answer' session.

Figure 1.7 shows revenues from events from 2006 to 2012. Again, because the data for 2013 and 2014 are from a different source than the earlier data, revenues for these years are not included in the chart.

**Figure 1.7 Revenues from event cinema screened in UK cinemas, 2006-2012**




| | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|---|
| Alternative content revenue | 0.2 | 0.8 | 3.1 | 4.7 | 7.5 | 10.5 | 12.5 |

Source: IHS

## COMMUNITY CINEMA IN THE UK

The screening of feature films in the UK is not limited to cinemas belonging to commercial cinema operators. There is a thriving sector of voluntary providers which makes a wide variety of films available to local communities which often have less access to commercial cinemas. This sector is often referred to as community cinema. Members of local communities are generally more involved in the programming of such cinemas than in the programming of their commercial counterparts. Screenings of films in this sector are in venues such as village halls, mixed arts spaces, independent cinemas and the like.

Cinema For All (formerly the British Federation of Film Societies) has surveyed its members on an annual basis since 2005/06 in order to measure the size, composition and geographical distribution of the community cinema sector in the UK. Here we present a summary of the key findings from the 2013/14 survey.

While many film societies and community cinemas have been in existence over a long period, new ones are established all the time. Two thirds (67%) of the responding organisations in the latest survey were established in 2000 or later, while 16% were established in the 1960s or earlier.

Most of the film societies that responded (73%) operated a membership system in 2013/14 (76% in 2012/13) and the average membership size was 152, but there was a wide range of membership sizes. The smallest membership was six and the largest was 1,701. The total membership of responding societies stood at 16,986. Membership of film societies remains popular: less than one quarter of respondents (23%) had fewer members than in the previous year.

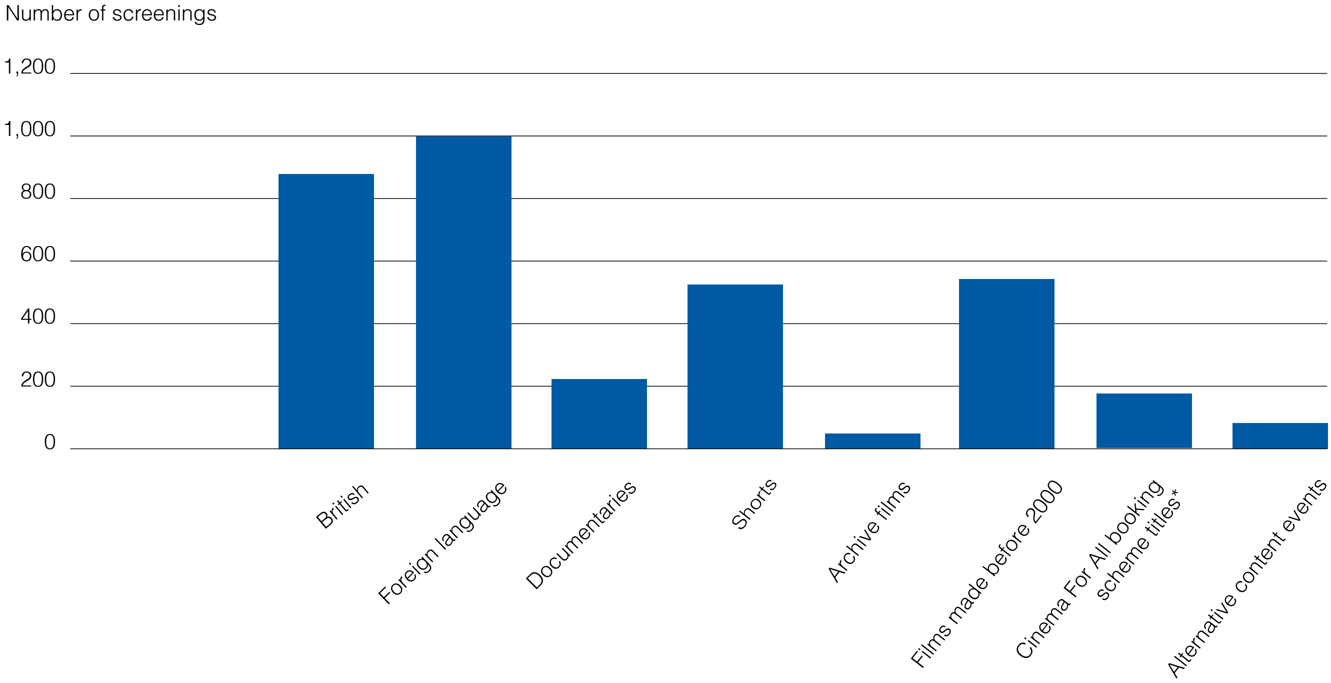
The average full annual membership fee was £29.10 (up from £23.59 in 2012/13). Two fifths (39%) of societies that operated a membership system charged an additional admission fee. The average charge was £4.40. Just over a quarter (28%) of respondents offered season tickets (22% in 2012/13). The average cost of a season ticket was £32.50, and charges ranged from £3 to £72. The average number of season ticket holders in responding societies was 81 (the same as in 2012/13).

Most responding societies (82%) were open to non-members for a charge on the door. The average admission fee for non-members was £5.20 (the average ticket price for commercial cinemas in 2014 was £6.72).

In the 2013/14 season, the responding organisations programmed a total of 858 different titles (704 in 2012/13) across 3,052 screenings. British films accounted for 25% of the titles screened, and 29% of the films shown were in a foreign language (compared with 15% in 2012/13). More than two thirds (70%) of titles were screened by only one film society (73% in 2011/12), indicating the diversity of programming choices made by individual societies. However, some titles proved popular choices across many film societies, and 34 films were programmed by 10 or more responding societies. Figure 1.8 shows the number of screenings by category of film. Titles sourced via the Cinema For All booking scheme accounted for 174 screenings.

Alternative content (via satellite or events recorded and delivered on Blu-ray) is increasingly available to community cinemas, and 83 events were screened by responding societies during 2013/14 (up from 32 in 2012/13).

**Figure 1.8 Number of film society/community cinema screenings by type, 2013/14**




| | British | Foreign language | Documentaries | Shorts | Archive films | Films made before 2000 | Cinema For All booking scheme titles* | Alternative content events |
|---|---|---|---|---|---|---|---|---|
| 2013/14 | 879 | 999 | 223 | 525 | 48 | 543 | 174 | 83 |

Source: Cinema For All
Notes:
* The booking scheme provides Cinema For All members with access to a catalogue of over 800 non-mainstream films.
Figures include both film societies and community cinemas.

Of the 34 films programmed by 10 or more responding societies in 2013/14, 11 were British, and 14 were in a foreign language. The three most programmed films were French film *Untouchable* followed by *The Hunt* (in Danish) and *Wadjda* (in Arabic). *Untouchable* was first released in commercial cinemas in the UK in 2011 and both *The Hunt* and *Wadjda* were released in 2012. Over half (54%) of all responding organisations held special events (eg screenings with guest appearances by the filmmakers, film themed social events, etc) in addition to regular screenings in 2013/14.

The average audience size in 2013/14 was 75 (67 in 2012/13), and the sum total of all admissions from responding organisations was 226,924. Just over one third (36%) of community cinemas saw an increase in their annual admissions compared with 2012/13, and 49% recorded roughly the same number.

The most commonly used format for screenings was DVD (used ‘usually’ or ‘sometimes’ by 96% of responding organisations), but the shift towards the use of Blu-ray reported over the previous two years continued in 2013/14. In 2010/11 almost half of respondents (49%) never used Blu-ray, but in 2013/14 only one quarter (25%)of responding societies never used Blu-ray. This format was ‘usually’ used for screening purposes by 40% of respondents (up from 30% in 2012/13) while 36% ‘sometimes’ screened using Blu-ray. Other formats are still used by some societies. VHS was ‘sometimes’ used by 4% of responding organisations, 35mm projection was ‘usually’ used by 2% (down from 12% in 2012/13), and 4% of respondents ‘sometimes’ used 16mm projection.

The use of new digital screening formats by community cinema providers continues to grow. Screenings via digital cinema were ‘usually’ or ‘sometimes’ used by 26% of respondents (24% in 2012/13), and 11% ‘usually’ or ‘sometimes’ used online downloads/streaming.

Figure 1.9 shows the percentage share of film society/community cinema admissions by nation and region in 2013/14. Yorkshire and The Humber accounted for nearly one third of total annual admissions from responding societies (compared with 8% of admissions to commercial cinemas in the Yorkshire ISBA region in 2014 – see Table 1.3). The South West region, which has a strong community cinema sector, accounted for 19% of film society/community cinema admissions, while the South West ISBA region accounted for just 2% of the UK's commercial cinema admissions in 2014. Conversely only 3% of film society admissions were in London, compared with the London ISBA region's 25% share of commercial cinema admissions. This provides evidence that community exhibitors enhance the provision of film in communities that have limited access to commercial cinemas.

**Figure 1.9 Share of film society/community cinema admissions by nation and region, 2013/14**

| Nation/region | % |
|---|---|
| Yorkshire and The Humber | 29 |
| South West | 19 |
| South East | 14 |
| North West | 10 |
| East of England | 10 |
| East Midlands | 6 |
| Scotland | 6 |
| London | 3 |
| West Midlands | 2 |
| Wales | 1 |
| North East | <1 |
| Northern Ireland | <1 |

Source: Cinema For All

## FILM FESTIVALS

In addition to commercial and community cinemas, many films find an audience through film festivals. According to the Independent Cinema Office (ICO) and the BFI's data on its own festivals, there were over 740,000 admissions at more than 50 film festivals in the UK in 2014. The festivals encompassed many themes and genres, eg animation, horror, sci-fi, shorts and films from a particular country or in a particular language. The second largest festival in 2014, in terms of attendance, was the French Film Festival, which featured French language films from many French speaking countries and regions. Other examples of themed festivals include the UK Jewish Film Festival (which showcases British and international films engaging with Jewish themes and culture), the Wildscreen Film Festival (which focuses on wildlife and environmental productions), BFI FLARE: London LGBT Film Festival, Fringe! Queer Film and Arts Fest and the Iris Prize Festival (all focusing on LGBT themes), Sheffield Doc/Fest, the Abertoir Horror Festival and the Bradford Animation Film Festival. The festivals took place in many parts of the UK but the highest attendances were mainly at large city festivals. The biggest festival, in terms of admissions, was the London Film Festival, while the Edinburgh International Film Festival and the Glasgow Film Festival followed the French Film Festival (based in a number of cities) as the third and fourth most popular events.

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