The Cinema Exhibitors' Association

Annual Report

2013

the cinema exhibitors' association limited

INTRODUCTION

2013 represented a watershed for UK cinema.

The year saw mixed fortunes across the film slate, resulting in a slight reduction in both admissions, which reached 165,539,976, and box office, which came in at £1,082,100,621.

But the real story was off-screen, where the UK sector finally completed its move to full digitisation. The significance of this change cannot be over-estimated, underpinned as it was by the achievement of the Digital Funding Partnership in ensuring the survival in a digital world of over 100 smaller UK operators – representing almost 300 cinema screens.

The continuing contribution of digital 3D to total box office, as well as the increasing importance of so-called 'event cinema' and greater flexibility of programming, all confirmed the fundamental changes underway in business models and relationships.

Elsewhere, UK cinema staff continued to offer unprecedented content security, with only two films lost to illegal recording during the entire year. This followed a period of almost two years without a single recording of a film – whether online or in hard copy – being traced back to a UK cinema. Compared to the problems experienced in many other film territories, and given the enormity of the task of ensuring security in such a technology-equipped world, this achievement should not go unrecognised.

Throughout the year, the CEA worked closely with colleagues at the British Film Institute (BFI) as they sought to deliver on an ambitious agenda of audience development and outreach. While the relationship was not without challenge, the early success of Film Nation, the organisation chosen to deliver the BFI 5-19 film education scheme, led to a hope that the commercial sector would be recognised as a key ally in efforts to grow cinema audiences for films of all kinds.

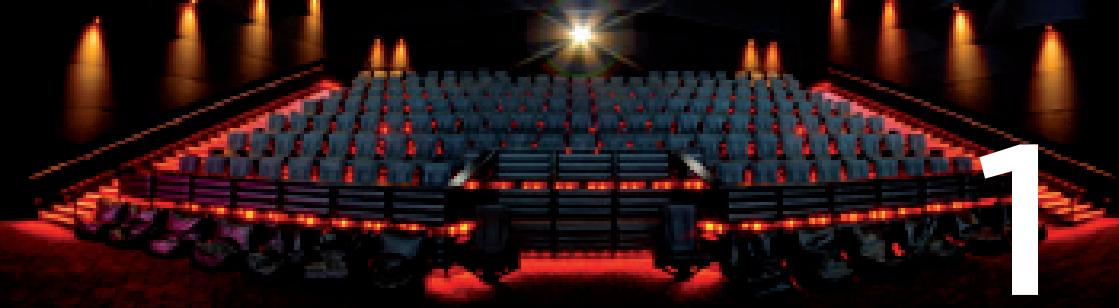
Efforts by the CEA to improve understanding amongst key politicians and opinion-formers of the cultural, social and economic value of the UK cinema sector progressed during the year, with the continuation of a programme of visits by MPs and other key Parliamentarians to their local cinemas and a number of gatherings with journalists and broadcasters in an effort to encourage more informed comment.

2013 saw the involvement of the Association on the European stage develop further, culminating in the election of CEA Chief Executive Phil Clapp to the post of President of UNIC, the European grouping of cinema trade associations and key operators.

During the course of the year, the CEA also continued to advise members on a wide range of issues. Disability and access was again particularly prominent, with efforts to broaden understanding of potentially important close caption technologies one key aspect of interest.

The Association also engaged with members on matters as diverse as energy efficiency and environmental management, online ticketing and booking fees, child protection, film classification, alcohol and entertainments licensing, sound levels in cinemas, digital cinema and related technologies and fire safety.

The CEA remains dependent on the support and engagement of its Executive Board, and of its wider membership, as it endeavours to provide a high level of service to operators large and small in ensuring that as many of the public as possible choose to see films in their best possible setting – the cinema theatre.



1 UK CINEMA PERFORMANCE – AN OVERVIEW

1.1 With a poorly-performing third quarter, UK cinema admissions in 2013 dipped below those for 2012 (where *Skyfall* contributed massively to a strong annual total), finishing some 4 per cent down. This reflected fortunes across much of Europe, where only the strongly-performing markets of Russia and Turkey - and a recovering sector in Italy – showed significant positive growth, as shown below.

Country	Cinema admissions 2013 (million)	Cinema admissions 2012 (million)	Change (%)
Austria	15	15.6	- 4.3
Denmark	13.7	14.2	- 3.3
Finland	7.8	8.6	- 8.9
France	192.8	203.6	- 5.3
Germany	129.7	135.1	- 4.0
Ireland	14.7	15.4	- 5.0
Italy	97.4	91.3	+ 6.7
Luxembourg	1.2	1.3	- 3.9
Netherlands	30.8	30.6	+ 0.7
Norway	11.8	12.1	- 2.7
Portugal	12.5	13.8	- 9.4
Russia	189.0	168.8	+ 12.0
Spain	76.9	90.9	- 15.4
Sweden	16.5	18.4	- 10.1
Switzerland	13.7	15.9	- 14.0
Turkey	50.3	44.3	+ 13.5
U.K.	**165.5**	**172.5**	**- 4.0**

Source: UNIC

1.2 Despite this slight decrease, the UK cinema sector continued to represent the fourth largest global market behind the US, China and Japan, with France fifth and India sixth.

1.3 The monthly figures for UK admissions in 2013, alongside those for 2012, are set out below.

Month	Cinema admissions 2013	Cinema admissions 2012	Change (%)
January	17,081,700	13,554,905	+ 26.0
February	13,960,141	15,314,443	- 8.9
March	10,885,645	11,703,294	- 7.0
April	11,887,940	15,052,518	- 21.0
May	15,607,698	13,439,811	+ 16.1
June	13,029,685	12,375,092	+ 5.3
July	14,321,221	15,515,393	- 7.7
August	17,639,654	17,218,808	+ 2.4
September	9,885,140	9,441,232	+ 4.7
October	11,865,573	16,834,615	- 29.5
November	13,669,359	17,644,644	- 22.5
December	15,706,221	14,404,019	+ 9.0
Total	**165,539,976**	**172,498,775**	**- 4.0**

Source: Cinema Advertising Association / EDI Rentrak

1.4 The increasing importance of the BAFTA season for cinema box office during the first quarter of each year was underlined again in 2013 by the early success of *Les Miserables*, which dominated proceedings for much of that time. There then followed a prolonged quiet period, which picked up only with the release of *The Croods* and in particular *Iron Man 3* in the late Spring.

1.5 The Summer months saw steady if not spectacular business, with the latest instalments of recognised properties, in particular *Fast and Furious 6; Star Trek: Into Darkness, The Hangover Part III* and *Monsters University* all seeing solid box office and admissions, aided by the strong showing of the Superman reboot *Man of Steel*. However the under-performance of a number of key titles during this period presented a considerable challenge, and it was therefore a relief when *Despicable Me 2* perhaps over-performed against expectations, going on to be the strongest title of the year.

1.6 Fortunes only truly rallied in the fourth quarter of the year, with *Gravity, The Hunger Games: Catching Fire; Frozen* and *The Hobbit: The Desolation of Smaug* all adding some much-needed firepower to the box office. As it was however the year ended some 4 per cent down on 2012 in terms of admissions, and 1.6 per cent down on box office, the latter totalling £1,082,100,621.

1.7 During the year, British film continued to perform well, with *Les Miserables* and *Gravity* in particular, but also *Philomena, The World's End, Quartet* and *About Time* featuring prominently in the mix.

1.8 Digital 3D also remained an important strand of additional income. Of the top ten films for the year, an unprecedented eight were available in the 3D format, and revenue from 3D screens represented around 17 per cent of the overall total in 2013. That said, it was clear that audiences were exercising increasing choice over which films they saw in 3D, resulting in a much broader variation in the split of income from 3D and 2D screens from film to film.

2 STRATEGIC ISSUES

2.1 During 2013, the CEA supported its members on a number of strategic issues. Below is a headline account of the relevant activities of the CEA in a number of these areas.

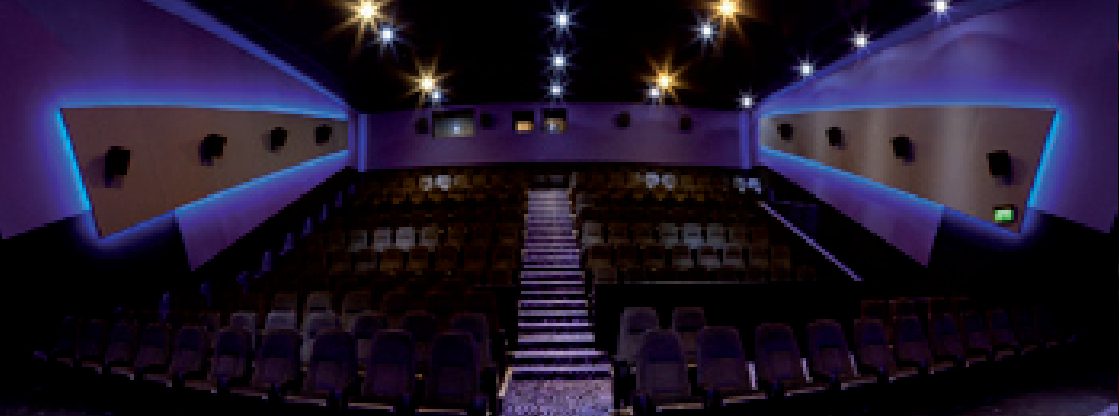
GOVERNMENT FILM POLICY REVIEW

2.2 One year on from its first report, the Government Film Policy Review Panel, led by Lord Smith of Finsbury, reconvened in 2013 to assess progress on its findings. The CEA fed into this process both through the formal consultation exercise and face-to-face discussions with the team supporting the Panel.

2.3 In doing so, the Association made clear its support for the focus of the earlier report on broadening and deepening the film audience, with a particular emphasis on British independent and specialised film, but also more generally. It also confirmed its commitment to working with the British Film Institute (BFI) – the public body charged with delivering film policy in this and a number of other relevant areas – to ensure the widest possible involvement of the cinema sector.

2.4 However, the CEA also made clear its concerns that the approach to date had not been sufficiently mindful of the contribution that the commercial sector might make to these efforts.

2.5 The Panel's considerations one year on focussed on a narrower range of issues than had their original report. As a result, it was not possible to revisit other key areas of interest for the exhibition sector, such as the longstanding desire to introduce a criminal offence of recording a film in a cinema theatre. This was something the Panel had supported, but which had been rejected by Government in its response.



2.6 As the year closed, the further report of the Panel was awaited with interest.

BFI FIVE YEAR STRATEGY

2.7 During the year, the CEA remained actively involved in a number of strands of the BFI Five Year Strategy *New Horizons for UK Film*. More details on specific elements of this are set out below. The ability of the Association to influence thinking in the BFI was boosted during the year by the appointment of Tim Richards of Vue Entertainment to its Board of Governors, responding to a longstanding CEA desire for an exhibitor voice in the governance of the organisation.

BFI Film Audience Network

2.8 A consequence of one of the key recommendations of the first report of the Government Film Policy Review, the Film Audience Network (FAN) seeks to develop audiences for film, in particular British independent and specialised film. The Network as a whole will benefit from around £2.5 million per year in funding, to support sharing of best practice and expertise and cross-cutting activity.

2.9 Planning and development of the FAN in 2013 focussed on the identification of a 'Hub Lead Organisation' (HLO) in each of nine defined regions across the UK, these for the most part being cinema venues (and CEA members). Following their announcement, each HLO was charged with establishing a network of venues across their region committed to supporting the audience development agenda.

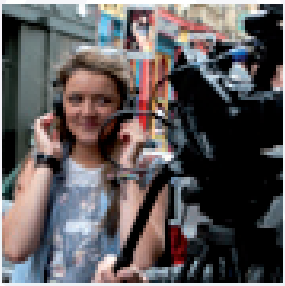
2.10 While supporting the aims of the Network, the CEA nevertheless expressed concern that some of the rhetoric underlying the rationale for its existence presented the commercial sector as part of the problem, rather than part of the solution. As the year closed, the Association was in discussion with the BFI on a more co-ordinated approach to the involvement of commercial operators, in particular the major circuits.

BFI 5-19 film education scheme

2.11 The announcement of Film Nation as the preferred delivery partner for the £26 million BFI 5-19 film education scheme was welcomed by the CEA, which had – through Cinema First – supported that organisation in the related tender exercise.

2.12 Amongst the first tasks of the new organisation was to begin planning for the first National Youth Film Festival, a week-long event introducing children and young people to the cinema experience. Building on the success of the long-running National Schools Film Week, the Festival aimed to bring a renewed focus to encouraging younger audience members to return to their local cinemas as paying customers.

2.13 With only four months to plan and deliver the Festival, Film Nation – with the active support of Cinema First – set themselves a target of involving at least 200,000 children and young people in the event, a lower figure than had been achieved in the forerunner of the Festival, but one which allowed a focus on quality of experience. Efforts to achieve this aim were helped by the active engagement of a large number of CEA member sites and colleagues in distribution.



2.14 In the event, the first National Youth Film Festival was an unqualified success, involving 211,656 children and young people and 34,788 adults (mainly teachers) in 1,319 screenings and other activities across 407 cinemas. Feedback from all those participating - including individual cinemas - was overwhelmingly positive.

2.15 As the year closed, plans were already in development to build on that success, both in the next incarnation of the Festival and in a range of cinema-related activities involving children and young people through 2014 and beyond.

DIGITAL CINEMA

Digital conversion

2.16 2013 saw digitisation in the UK enter its endgame, such that by the end of the year only a handful of screens remained unconverted. As a result, the question being asked was one of when rather than if the major studios would cease supplying films in anything other than a digital format. As 2013 closed, several distributors were already moving to digital-only releases, with 35 mm being made available only on an exceptional basis.

2.17 While 3D exhibition remained a key element of the cinemas mix, there were signs that audiences were exercising increasing choice over which films they saw in that format. As a result the split of income between 3D and 2D screens (where available in both formats) varied significantly from film-to-film. That said, where the 3D format was seen as indispensible to the experience – such as with *Gravity* - then audiences responded in huge numbers.

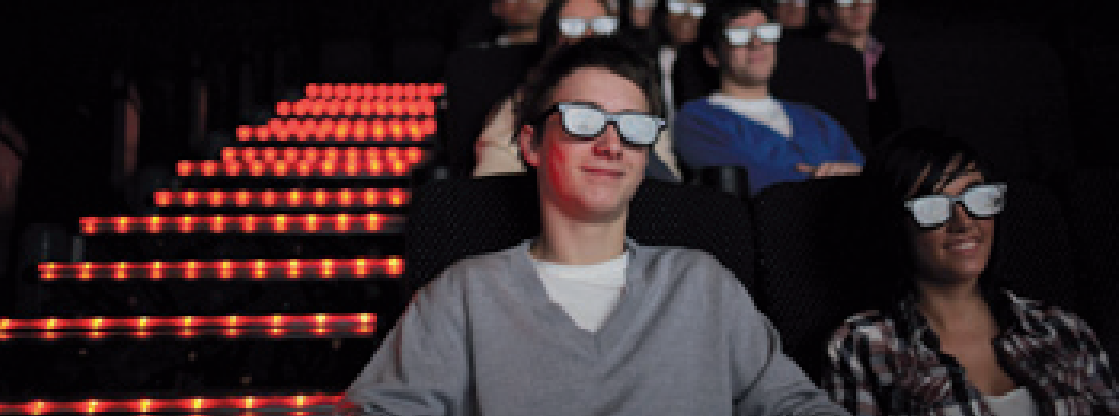
2.18 Event cinema – formerly called 'alternative content' - also continued to thrive during the year. By the end of 2013, income from this source – primarily from live theatre, ballet and opera – represented 1.8 per cent of box office or almost £20 million. Underlying this headline figure is a wide variance in the extent to which different operators are exploiting this genre; for some it represents as much as 15 per cent of annual box office.

2.19 Amongst a number of highlights in this area in 2013, the one-off broadcast in November of *Doctor Who*: *The Day of the Doctor* saw an incredible £1.8 million taken at the box office on one day, 97 per cent of that from 3D screens. What makes this all the more remarkable is the fact that these screenings coincided with the live free-to-air TV broadcast of the same content.

Digital Funding Partnership

2.20 In September, the UK Digital Funding Partnership (DFP), established by the CEA to support small and medium-sized cinema operators seeking to digitise, announced the completion of its roll-out.

2.21 All told, this initiative resulted directly in the conversion of almost 300 cinema screens across the UK (and arguably drove deals for a significant number more). In doing so it secured a future for over 100 smaller cinema sites. The route taken – a co-operative between commercial operators, involving no public funding – was unprecedented in both its ambition and its success.

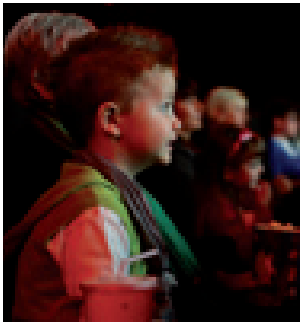


2.22 The 'Virtual Print Fee' (VPF)-based funding agreement on which the model of the DFP was established, secured with the integrator DCinex, was not without its challenges. But as the year closed all the signs remained positive, with members able to benefit from a secure content supply going forward, and with thoughts continuing on how the DFP might leverage its size and structure to benefit from agreements within other parts of the exhibition service and provider sector.

The digital future

2.23 With digital conversion achieved, the focus of the cinema sector, both in the UK and globally, has almost immediately shifted to technologies already emerging into the market or soon to arrive. Higher Frame Rate (HFR) technology – to date only seen in the first two instalments of *The Hobbit* trilogy - has had a mixed reception from audiences. Greater interest is already however apparent in so-called 'immersive' audio, with several major operators starting to install these systems in their key theatres. And laser illumination, offering brighter and more consistent light levels, particularly in 3D, will soon become a key element of the menu of improvements on offer to the cinema operator and audience alike.

2.24 Away from the auditorium, digital delivery of content, whether by satellite or broadband, is an increasingly contested area, with a variety of different solutions currently on offer.



2.25 And in light of the new income streams offered by more flexible programming and event cinema, both the exhibition and distribution sectors are learning to operate in a new, more flexible and responsive world.

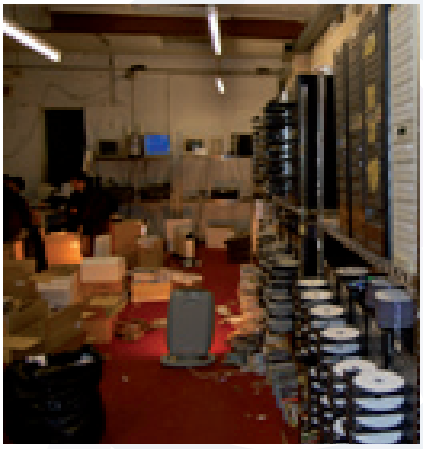
FILM THEFT

2.26 Efforts continued throughout the year to reduce instances of film theft, in particular where individuals sought to record films in cinema theatres. Cinema staff played their full part in tackling a problem which overall was estimated to have cost the broader film and TV industry some £511 million in 2011, the most recent year for which reliable figures are available. Of that, the financial losses to the UK cinema sector were calculated at some £216 million, the equivalent of around 21 per cent of annual box office or just under 36 million admissions.

2.27 The CEA continued to work closely with a range of organisations across the industry on this issue. Particular partnerships, and the Association's work on specific issues, are summarised below.

Film theft in cinemas

2.28 The UK maintains a position as one of the most effective territories in preventing illegal recordings in cinemas. During the year the FACT Theatrical Protection Programme, supported by funding from the Film Distributors' Association, continued to operate successfully across the entire UK cinema sector, with only two proven UK recordings, both of which were traced and led to arrests by police.

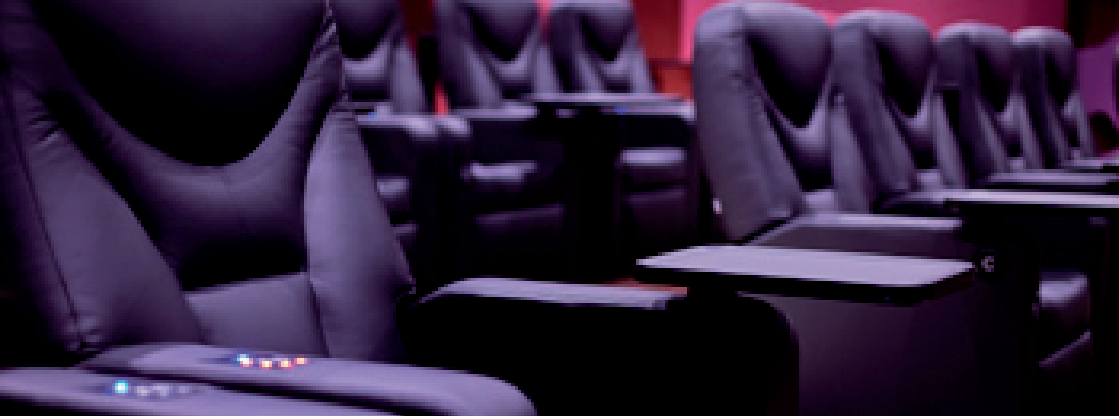


2.29 The vigilance of cinema staff led to a year-on-year increase of 32 per cent in reported incidents of illegal recording activity in UK cinemas, taking the total to over 80, the highest ever. This was in large part the result of an extensive programme of training undertaken by FACT, with sessions conducted at 44 cinemas to almost 1,500 staff. These ranged from as far afield as Belfast, Edinburgh, Gateshead, Norwich, Manchester, Eastbourne, Ashford and Cardiff. In addition the FACT 'rewards' scheme, recognising the efforts of those who had succeeded in disrupting efforts to record films in their theatres, paid out over £15,000 at two separate events in central London.

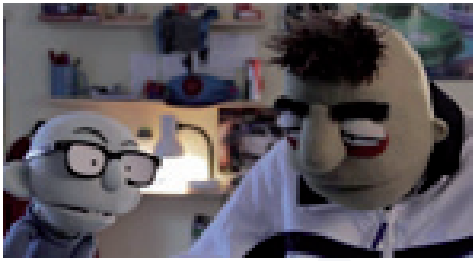
2.30 During the year, FACT also continued its efforts to target 'source' piracy, with over 140 websites shut down and action taken against UK-based 'release group' members, resulting in the closure of prolific sources of pirated film and other media. Over 60 website operators were also visited by FACT, all agreeing to sign over their domains, which then directed visitors to the industry-funded site www.findanyfilm.com, helping consumers make a legitimate purchase.

Industry Trust for IP Awareness

2.31 Working through the cross-industry body Cinema First, 2013 saw continued CEA support for the Industry Trust for IP Awareness, working to raise awareness and understanding of the impact of film theft and direct the public to legal sources of film content.



2.32 During the year, the Trust continued to evolve and strengthen its messaging, seeking to deliver behavioural change amongst film audiences, drive greater engagement with cinema (alongside other film formats) and promote the 'value' of film content. Its pioneering, multi-media *Moments Worth Paying For* campaign delivered a range of powerful trailers in collaboration with some of the year's leading releases, including *Iron Man 3, Despicable Me 2,* and *Hunger Games: Catching Fire*. The campaign developed further with the delivery of bespoke filmed content from Ron Burgundy from *Anchorman 2: The Legend Continues*.



2.33 The consistent quality of the campaign saw these trailers benefit from around 40 million admissions with associated outdoor digital activity reaching a much larger figure still. More importantly, these high profile collaborations increased campaign awareness to 55 per cent amongst the target groups and doubled 'intention to purchase' in those exposed to the campaign.

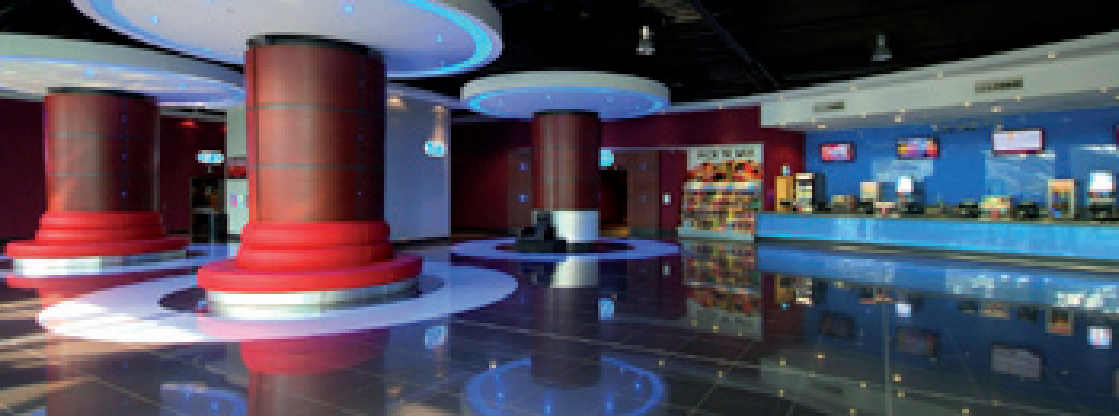
2.34 During the year, both through *Moments Worth Paying For* and otherwise, the Trust directed audiences to the industry-funded site www.findanyfilm.com as a means of connecting them with films from all legally-available sources. It further enhanced this approach with the development of dedicated booking 'apps' and tools for exhibition, all warmly-welcomed by the sector.

Alliance for Intellectual Property

2.35 CEA support for the work undertaken by the cross-industry body the Alliance for Intellectual Property (formerly the Alliance Against IP Theft) continued through the year. The Government's *Modernising Copyright* agenda – following up on the reforms suggested by the Hargreaves Report to Government – occupied much of the lobbying efforts of the Alliance during this time. Although not directly relevant to the interests of exhibition, the CEA was mindful that any move to weaken the copyright framework could only be detrimental to the interests of the wider film industry.

2.36 Despite the concerns voiced consistently by the Alliance, and reiterated by a range of academics and the influential House of Commons Culture Select Committee, the Government continued down its chosen path, making the Alliance strategy one of harm minimisation for those content businesses – including film – which depend on a strong IP framework.

2.37 Alongside these efforts, the Alliance also continued its work to ensure that the value of IP, the contribution it makes to the UK economy and its importance to small and medium-sized companies across the UK was understood. Its production and launch of an IP Map – a visual demonstration of the number and variety of businesses (including cinemas) across the UK which rely on IP for their commercial and business success - was a key step forward in this regard.



RELEASE WINDOWS

2.38 The CEA strongly supports the maintenance of a clear 'window' between a film's theatrical release and its release on other platforms, believing that this ensures that audiences continue to enjoy the widest possible range of films in their intended environment, the cinema theatre. It is the unique nature of the cinema experience which means that so many cinemas across the UK remain key focal points for their local communities.

2.39 While decisions on the release window around any one film are a commercial matter between exhibitors and the relevant studio and not ones in which the CEA has any role, the Association would be concerned by any moves taken in this regard at the expense of cinema exhibition, a part of the film industry which continues to perform strongly.

2.40 During the course of 2013, the average theatrical release window reduced from 115 to 108 days. This headline figure however masks a wide range of practices, with the overall average reduction the result of an increasing number of lower budget films being released on windows of 30-90 days.

2.41 While the market dealt with much of the movement in this area, attention also shifted to the European stage, where the European Commission embarked on a number of unevidenced (and to many, unwelcome) forays into promoting day and date releases of smaller films. The CEA, through its involvement in the European grouping UNIC, sought to challenge this unnecessary incursion into what is in the UK rightly seen as a market-led area of activity.

DISABILITY AND ACCESS

2.42 The UK cinema sector is generally considered as a World leader in its efforts to meet the needs of disabled customers. During 2013, cinema operators continued to make significant investment in improving the physical environment of their sites and in providing support for those with sensory impairments.

2.43 In supporting this work, the CEA relied once again on the advice and guidance of members of its Disability Working Group (DWG). Comprising representatives from circuit and independent cinema operators, distributors, equipment manufacturers and groups representing disabled people, the DWG met three times during the year, but was involved on a regular basis across a wide range of issues.

2.44 The key focus of activity during 2013 was on issues around sensory impairment, in particular subtitling and audio description in UK cinemas, where considerable efforts – explained in detail below – were made to explore emerging technologies. But resource was also directed towards the two DWG sub-groups established in 2012, dealing with learning disability and autism and physical access respectively.

2.45 The Association remains hugely grateful to all of those that participate in or support its work on these important issues, and help to make the cinema-going experience as enjoyable and accessible as possible for all disabled customers.

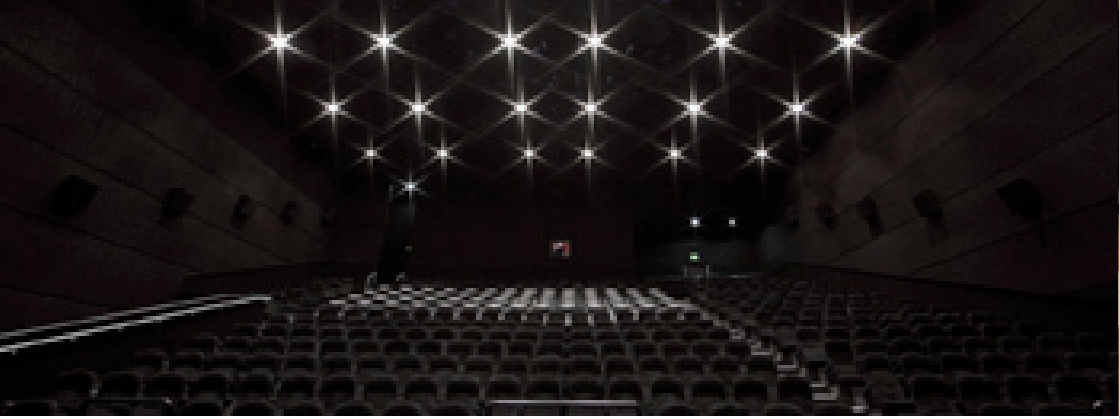
Staff training

2.46 The CEA took the opportunity throughout the year to promote to its members the training resource produced with the support of key UK operators at the end of 2012. Comprising a training film and a substantial range of supporting materials, the resource aimed to help members to increase awareness amongst their staff of issues of disability and access.

Subtitling

2.47 Over the last decade, subtitled screenings for deaf and hearing-impaired customers have grown significantly such that there are now over 1,000 such shows every week in the UK. However the resistance of the wider audience to subtitling on screen, and the resultant financial impact on operators of providing these shows means that continued expansion is not economically viable.

2.48 For that reason, and coupled with a desire to offer disabled customers the best possible experience, there is increasing interest in emerging technologies which provide a personalised subtitling solution, whether through subtitling glasses or individual screens on which subtitles are displayed. Provision of 'closed captions' in this way would help address many of the economic barriers seen with the current delivery of 'open' subtitled screenings, potentially opening up all screenings to deaf and hearing-impaired customers.



2.49 To help generate better understanding in these areas, in March the CEA held two events involving some of the leading suppliers of closed caption solutions. The first of these gave colleagues from across the industry the chance to learn more about and experience use of the various systems, which included both subtitling glasses and personal screens. The second event, held over a weekend, saw these same solutions tested 'in the field' by over 60 deaf and hearing-impaired members of the public and their families during a screening of the Disney movie *Wreck-It Ralph*, specially configured for the occasion.

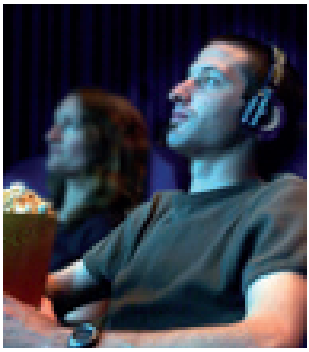
2.50 Both events provided valuable additional insight into these technologies both for the industry and the manufacturers themselves. While arriving at a viable business model remains a challenge, the CEA will continue to explore the potential of these and other emerging solutions as it seeks further to improve accessibility for disabled customers.

Autism Friendly Screenings

2.51 2013 saw interest in Autism Friendly Screenings (AFS), an activity which had arisen in the last few years, take firm hold across the UK cinema sector. Such screenings – where a less challenging sensory environment is provided by having sound turned down a little, the lighting left at a low level and audience members allowed to move around and make noise – have become increasingly popular for those on the autism spectrum and their families. Working with representative groups at both the national and local level, a large number of cinemas are now able to reach out and support customers with particular needs and ensure they have an enjoyable cinema experience.

2.52 Recognising this growing interest, in May the CEA distributed to members a guidance note on AFS, providing practical advice for those wishing to start such screenings on the steps necessary to make them a success.

CEA Card



2.53 The CEA Card is a national voluntary scheme designed to make a visit to the cinema for a disabled person more straightforward. By having a CEA Card, the cardholder indicates that they have a disability which will require the cinema to make 'reasonable adjustments', the cardholder's preferred method of achieving these being through the provision of a free ticket for someone to accompany them.

2.54 The popularity of the CEA Card with disabled cinema-goers remained strong during 2013, with continued support from the vast majority of CEA members seeing over 1 million free tickets given away to over 95,000 cardholders.

2.55 During the year, changes to the benefits schemes underlying eligibility for the Card – in particular the move from Disability Living Allowance to the new Personal Independence Payment – provided an opportunity for the CEA to look again at the administration of the scheme, with plans in development to make the processes of application and verification more straightforward for all concerned.

yourlocalcinema.com

2.56 subtitles@yourlocalcinema.com is a listings website for subtitled and audio described films. Funded by a number of industry bodies, including the CEA, the service continues to provide for communication about accessible films to over 70,000 recipients every week and enjoys the full support of the industry.

MUSIC RIGHTS

2.57 The issue of music rights collection continues to be a concern to cinema operators, not just in this country but across Europe. In the UK, such payments are collected by PRS for Music, the collecting agency for music rights of songwriters and publishers, all cinemas having to pay PRS a fee for playing music played in their cinemas, whether as part of a film or event or simply as background music in foyers and auditoriums.

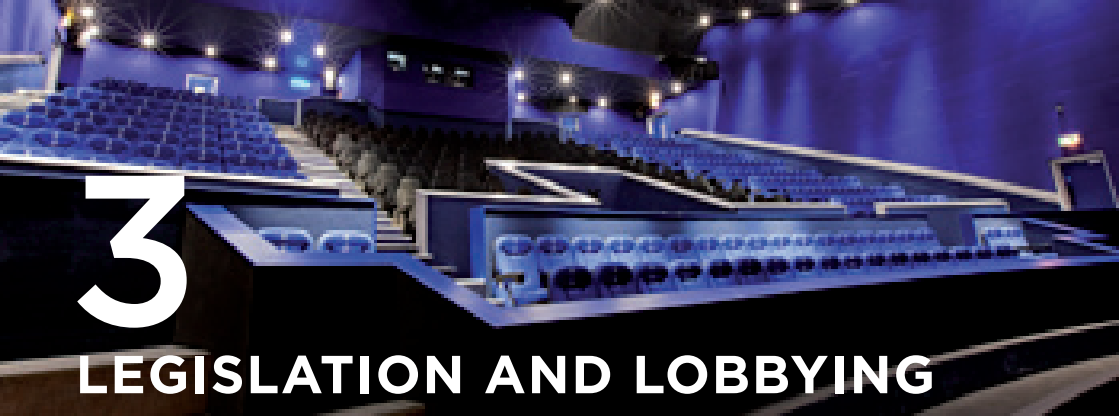
2.58 The CEA and its members absolutely support the entitlement of all creative people to be rewarded for their work. However, all also strongly believe that it is important that the royalties paid are a fair and appropriate reflection of the value that music provides to the overall cinema experience. There is also the need to ensure transparency in the system so that it is clear that the 'right' people get rewarded for their work.

2.59 Over a period of many years, cinemas have consistently argued that the fees paid to PRS are too high and do not reflect the contribution of music to the modern cinema-going experience. The longstanding tariff for such payments requires that they are paid according to a 1 per cent of box office or 'pence per admission' (PPA) measure – 5.16p in 2013. As a result, payments by the former method have risen consistently in recent years reflecting a steady growth in box office revenues.

2.60 However, CEA analysis has confirmed that - at a time when admissions have been relatively flat - box office growth has been driven almost exclusively by premium payments for extras such as 3D and VIP seating. As such, this additional income has been unrelated to music, yet PRS and its members still benefit from it.

2.61 The cinema sector has been in a period of significant investment, including in digital projection, 3D and other new technologies, and in luxury cinema experiences. Understandably therefore many cinema operators continue to feel that it is unfair that the income which is needed to help offset this investment should be shared with PRS.

2.62 At the outset of 2013, the CEA nevertheless agreed to a continuation of the existing tariff – whilst maintaining its objections to a number of key elements – whilst compliance audits of the three largest cinema operators were undertaken at the request of PRS. These exercises continued throughout the year, and were the subject of prolonged discussion between the companies involved and their respective auditors, with a number of matters remaining unresolved as the year closed.



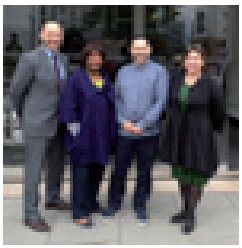
3 LEGISLATION AND LOBBYING

3.1 2013 saw a number of policy decisions and strategies emerge from Government which presented a challenge to the interests of the CEA and its members. While a general unwillingness on the part of Government to engage with the Association was on occasions disappointing, the CEA nevertheless sought actively to influence the political and public agenda.

PRO-CINEMA MESSAGING CAMPAIGN

3.2 During the year, the CEA continued its pro-cinema messaging campaign, seeking to ensure that key politicians and opinion-formers better understood the value of the industry in economic, social and cultural terms.

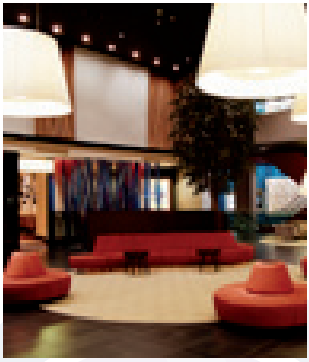
3.3 Working with colleagues at PSA Communications, a programme of visits to local cinemas by MPS and other Parliamentarians continued, such that by the end of the year an incredible 137 visits had taken place since the beginning of the campaign. Feedback on these was universally positive, with a clear sense that - even for those politicians who were regular cinema-goers - the experience of a 'behind the scenes' visit, and the chance to speak in depth to cinema staff, had proved an illuminating experience. Each MP involved left with a specially-tailored 'hand-out' including key facts and figures about the industry and a series of key achievements across the community, economic, investment and cultural spheres.



3.4 2013 also saw a continuation of the regular CEA Parliamentary Newsletter - *The Big Picture* - which provided further information and background on industry and political developments. Editions in May and September provided updates on a range of issues, including disability and access, public health, business rates, entertainments licensing and digitisation.

3.5 The overall objective of this campaign is to build a strong and sustained relationship between each politician and their local cinema. The hope is to establish a ready-made 'lobby' of support should the sector require additional input on challenges such as those set out below.

LICENSING



Entertainments licensing

3.6 Having successfully opposed proposals published by the Department for Culture, Media and Sport (DCMS) in 2011 to remove cinemas from the current entertainments licensing process, in 2013 the CEA was presented with a new proposition, specifically to remove 'not for profit, community venues' from that regime.

3.7 In some ways, the Association and its members found these proposals even more objectionable than their predecessors, which would have at least ensured a 'level playing field' across the sector.

3.8 In responding to the Government consultation exercise, the CEA maintained there was not sufficient (or indeed any) evidence to justify this deregulation, which would create a series of loopholes in the licensing regime, fostering a lack of proper oversight and assurance of safety and child protection which audiences of all types have come to expect and demand. The Association saw the lack of clarity over the definition of 'community venue' status in particular as giving implicit encouragement to profit-making venues to flout copyright and content controls.

3.9 The British Board of Film Classification (BBFC) joined the Association in expressing concerns about the potential impact of the proposed changes on the current classification system, which relies on the existence of a local authority licence to provide a means by which to encourage observance of the necessary restrictions on audience.

3.10 In seeking to counter these proposals, the CEA was able to call on a large number of backbench MPs, who recognised the threat they represented to small cinemas operating in their constituencies. The responses received by these individuals in correspondence with DCMS Ministers did nothing to allay fears, and it was disappointing that towards the end of the year the Government confirmed its plans to press ahead with these changes.

Alcohol licensing

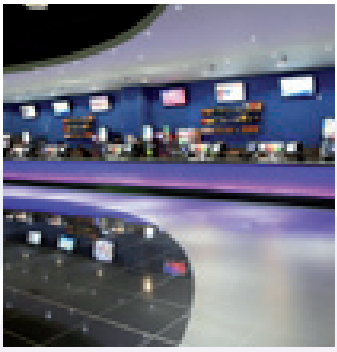
3.11 At the beginning of 2013, the Government consulted on its Alcohol Strategy, a wide-ranging programme of action intended to curb excessive alcohol use. As cinema is a sector which has long supported attempts to ensure that alcohol is consumed in a reasonable and proportionate manner, the CEA welcomed the vast majority of measures within the Strategy.

3.12 However it did express concerns about proposals to restrict licences in areas where the cumulative impact of alcohol use from a range of different venues was seen to be problematic – so-called Cumulative Impact Areas. The CEA argued that each application should be judged on its merits, and even where a cinema was situated in such an Area, its application – given the environment in which it would serve alcohol – should not automatically be struck out.

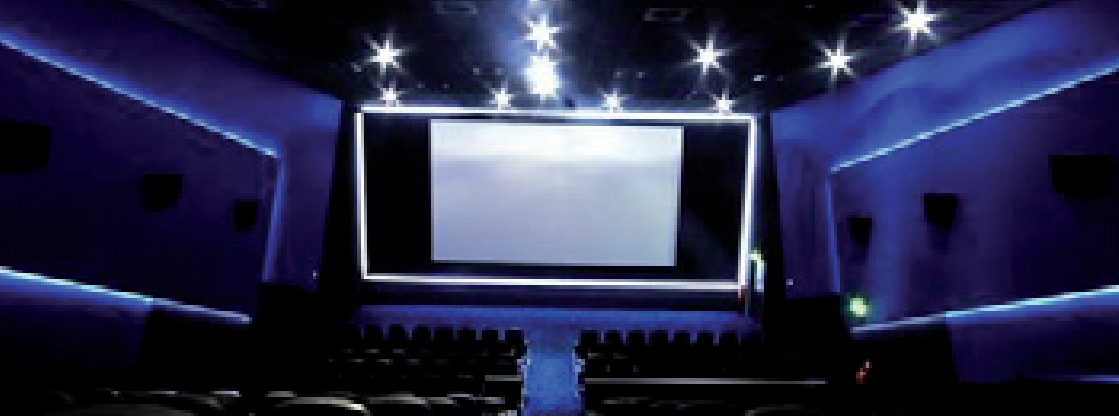
PUBLIC HEALTH RESPONSIBILITY DEAL

3.13 Throughout 2013, pressure from Government – and the Department of Health in particular – on the UK cinema sector continued. Following initial discussion with Government on the Public Health Responsibility Deal, which asks businesses to sign up to various pledges on healthy food, alcohol etc, the CEA sought to educate officials both on the cinema business model, but also on the extensive work that cinemas had already undertaken to allow customers to make informed choices on what they ate during a visit to the cinema.

3.14 However it made clear that underpinning all of this should be an understanding that the vast majority of people visit the cinema only a few times per year (on average people visit the cinema only 2.7 times per year in the UK) and so the impact of anything eaten or drunk at a cinema is likely to be minimal. Allied to which, the traditional cinema staples such as popcorn or fizzy drinks are seen as a one-off 'treat' and not something that anyone would ordinarily consume on a regular basis.



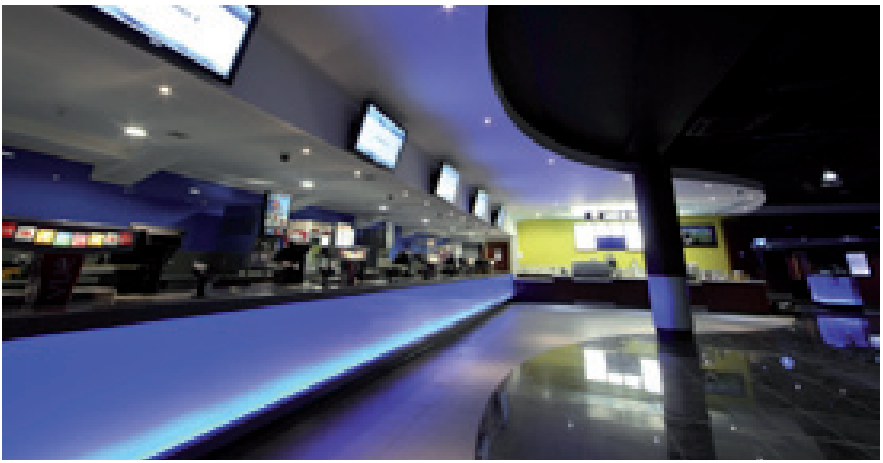
3.15 That said, the food and drink offering from the cinema sector continues to develop, with many operators offering healthier options such as frozen yoghurt or muesli bars alongside longstanding choices such as low or no calorie drinks (including of course mineral water). An increasing number now provide information on calorific and/or fat content, emphasising the basic point that decisions in this area are a matter of personal choice for our guests.

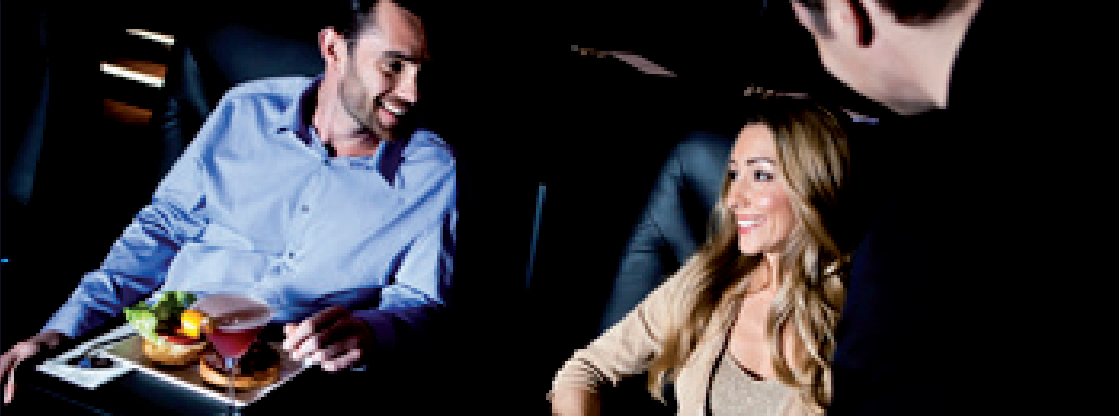


SMOKING IN FILMS

3.16 Issues around the portrayal of smoking in films were again raised during 2013, both by Government officials and by a number of local health authorities, all calling for a range of additional controls including that all films with smoking scenes be classified at '18'.

3.17 As on previous occasions where this has been raised, the CEA joined industry partners including the BBFC and the Film Distributors' Association in rejecting such proposals as unnecessary and disproportionate. The BBFC again felt it necessary to remind both the media and public that their guidelines already allowed them to take into account the potential impact of scenes of smoking on audiences when deciding on a film certificate.





SCREEN ADVERTISING

Classification of screen advertising

3.18 Screen advertising is currently subject to two regulatory regimes: classification by the BBFC in accordance with their published guidelines; and clearance by the Cinema Advertising Association according to the requirements of the Committee of Advertising Practice Code.

3.19 During the course of 2012, the CEA and colleagues from the screen advertising agencies Pearl and Dean and Digital Cinema Media had taken the opportunity afforded by a public consultation to argue strongly that this dual regulation was inappropriate in a digital world. It was noted that cinema now needed to compete directly for advertising income with other platforms such as TV and online and that the current approach acted as a barrier to competitivity. It was felt that the controls in place should be solely those exercised by the advertising industry, which in many respects represent a higher hurdle than the BBFC regime. As a result this change could be made without any negative impact on standards of public protection.

3.20 All parties were therefore delighted when in May 2013 the DCMS announced that that it had accepted these arguments, and would look to legislate at the earliest opportunity to remove screen advertising from the BBFC regime. As the year closed, the sector awaited details of this change.

Alcohol advertising

3.21 Issues around alcohol advertising in cinemas were occasionally raised during the year, where the CEA and some of its key members supported the two screen advertising agencies as they sought to demonstrate the robust controls already in place to ensure appropriate behaviour in this area.

ZERO HOURS CONTRACTS

3.22 During the Summer of 2013, the issue of 'zero hours contracts', where individuals are offered contracts with no minimum guarantee of working hours each week, became the subject of increasing media – and inevitably political – concern. In the light of press coverage, both Government and Opposition spokespeople went on record in criticising what they saw as the abuse of such contracts, specifically where individuals were required to spend unpaid 'down time' on site between paid shifts and where they were prevented from taking other employment regardless of their levels of contracted activity.

3.23 In responding to enquiries on this issue, the CEA recognised that the use of flexible zero (and low) hours contracts in the cinema industry was widespread, as it was in a number of other sectors where demand has peaks and troughs. Cinemas could not risk being understaffed during busy periods nor overstaffed when during quiet times. The level of flexibility offered by such contracts was essential in order for the business model to work.

3.24 Furthermore cinema remains a particularly desirable place for seasonal workers such as students, who welcome the flexible working hours allowed by these contracts, which do not affect staff entitlement to other employment rights such as holiday pay.

3.25 At the very end of the year, the Department for Business, Innovation and Skills launched an informal review into the use of zero hours contracts. The CEA is absolutely confident that all members use these contracts sensibly and that none adopt any of the practices likely to be targeted by regulation.

BUSINESS RATES DISCOUNT

3.26 In his Autumn 2013 Statement, the Chancellor announced plans for a business rates discount of £1,000 for each of two years for high street retailers with a rateable value of less than £50,000 per annum. The intention behind this was to provide a boost to high street businesses that drive retail footfall. The Treasury press notice issued at the time mentioned 'pubs, cafes and restaurants' as potential beneficiaries, but made clear that other categories of establishment would be considered when official guidance was issued.

3.27 Given the crucial role that many cinema sites play in this regard, the CEA immediately lobbied for the inclusion of cinemas as one of the eligible categories in the official guidance. As the year closed, it awaited the publication of this document to see whether its arguments had been accepted.

BOOKING CHARGES

3.28 A large number of cinemas now offer customers the opportunity to buy tickets online or over the telephone, increasing the convenience and often the speed of their cinema-going visit. Providing this service, and dealing with the bank transaction charges arising from credit and debit card payments, does not come without cost, and most levy a small booking fee or similar on such purchases, typically capped at a certain number of tickets or at a certain fee.

3.29 Following the submission of an earlier so-called 'super-complaint' to the Office of Fair Trading (OFT) by the consumer organisation *Which?*, the Government had announced in 2011 plans to ban what it saw as 'excessive' surcharges for credit and debit card transactions. In a subsequent consultation, the Association sought to defend the right of cinema operators to charge a proportionate fee for proving online and telephone booking services to customers, something that was recognised in the Regulations passed by Government at the end of that year.

3.30 When official guidance on interpretation of the Regulations was issued in late March 2013 – unhelpfully less than two weeks before they came into operation - the CEA was nevertheless pleased to see that they would have no appreciable impact on the legitimate operations of cinema operators in this regard.

4 PUBLIC ADVOCACY

4.1 During the course of the year, the CEA took every opportunity to ensure that the views of UK cinema exhibition on key issues were heard in the media. As well as those contributions detailed below, articles and responses by the Association were published over 2013 in trade publications such as *Screen International, Cinema Technology, Screen Trade, Moviescope* and *Cue Entertainment*, where the CEA gave its views on issues including the health of the UK cinema sector, the digital transition, digital 3D, event cinema, emerging cinema technology, disability and access and film theft.

PRO-CINEMA MESSAGING CAMPAIGN

4.2 As a counterpart to the public affairs strand of the pro-cinema messaging campaign set out in Chapter 3, the CEA continued during 2013 to reach out to key contacts in the print, online and broadcast media. The aim of this approach was to ensure that they were up to date with the latest developments in the cinema exhibition sector, and to offer comment on and insight into particular issues.

4.3 Central to these efforts were a series of 'media dinners', bringing together key journalists with senior representatives of the cinema sector. Dinners held in Manchester, London and Glasgow during the year involved 13 correspondents covering not just film, but also business and economic affairs, technology and social issues. Holding events outside of the capital also allowed a focus to be put on the extent to which cinema is having a role in regenerating communities across the country.

4.4 Each event was well-received, and follow-up with the journalists involved generated a good deal of positive (and more informed) media coverage in *The Independent, The Guardian, The Times, The Sunday Times* and *The Daily Telegraph*.

4.5 The CEA also continued with a social media strand, both monitoring relevant feeds so as to identify and – where necessary – respond to comments about cinema and cinema-going on a wide range of social media sites, and developing its own social media messaging. By the end of the year the CEA Twitter feed had over 400 'followers', of which a significant proportion were journalists or bloggers.

4.6 In order to provide an up-to-date digest of key facts and figures, in 2013 the Association also continued providing a monthly 'cinema barometer', setting out the latest admissions and box office figures, audience breakdowns by region and other key data. Editions of the barometer were typically downloaded by over 40 interested individuals.

5 PROMOTION AND MARKETING

CINEMA FIRST

5.1 During the year, the work of Cinema First, the cross industry body charged with finding ways to promote and encourage cinema-going, and benefiting from income from the EE Wednesdays promotion, continued.

EE WEDNESDAYS

5.2 2013 saw continued success for the EE (formerly Orange) Wednesdays 2 for 1 ticket promotion. While the promotion experienced a slight reduction in the number of free tickets issued, by the end of the year the total had still reached an extraordinary 6.6 million, as price-conscious customers continued to seek out value entertainment.

NATIONAL ADVERTISING SPOTS

5.3 CEA members continued in 2013 to support the separate 'goldspot' deals, where key advertising partners benefit from exposure in the advertising slot immediately before the start of the main feature. A new contract was agreed which would see a continuation of the longstanding EE promotion for 'general audience' films, while for those films deemed to be particularly attractive to a family audience, Sky continued to offer a range of engaging and creative advertisements.

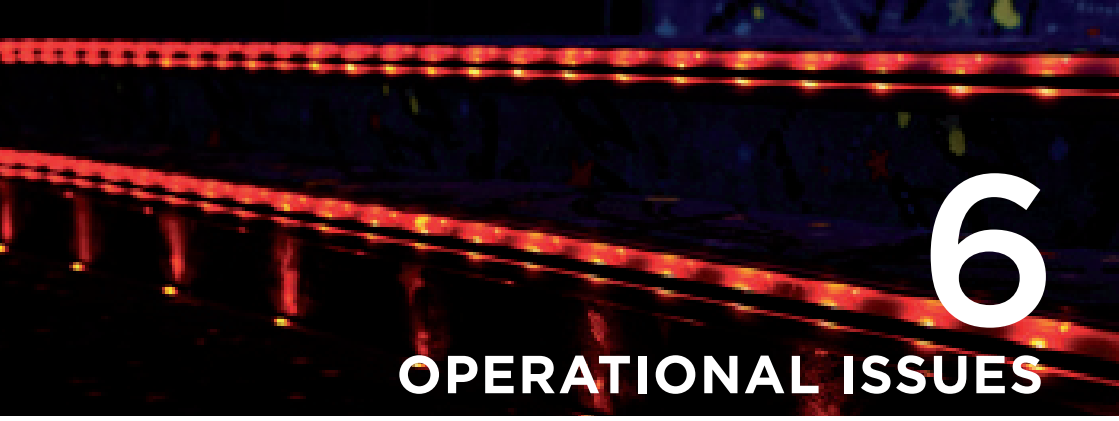
SCREEN AWARDS

5.4 For the first time in 2013, the CEA sponsored two separate exhibition categories as part of the established Screen Awards. In the absence of any other industry-wide awards scheme, the Association saw this as a good way of recognising and celebrating best practice in the sector.

5.5 Looking to move away from previous approaches which had focussed solely on box office and admissions, entries were encouraged from companies - in two separate categories of those with more than 50 screens and those with 50 or fewer – showing particular innovation in marketing and outreach. The response to this was exceptionally enthusiastic, with strong short-lists in both categories. The eventual winners, Vue Entertainment and Picturehouse Cinemas, were announced at a high profile awards ceremony in London in October.

SUMMER OF CINEMA/AUTUMN CINEMA TRAILERS

5.6 CEA members were again pleased to exhibit the successful film 'season' trailers, produced by the Film Distributors' Association and giving a taster of the wide range of exciting films coming up in subsequent months. Both the Summer of Cinema trailer, which was released in May, and the Autumn/Winter Cinema trailer in October were warmly-received by audiences and served to broaden their film choices. The CEA looks forward to supporting this initiative again in 2014.



6 OPERATIONAL ISSUES

ENERGY EFFICIENCY AND ENVIRONMENTAL MANAGEMENT

6.1 Energy efficiency and environmental management remain an important operational and ethical issue for cinema operators. In 2013 the CEA Energy and Sustainability Working Group continued its work with the consultancy Energise to support cinemas in becoming more energy efficient and reducing carbon emissions.

6.2 Results of pilots that the CEA undertook with Energise in previous years had clearly demonstrated that those using the current 'toolkit' could make significant energy savings with relatively minor investment and changes to their working practices.

6.3 While very well-received by those who had used the toolkit, in an effort to widen its use, 2013 saw case studies undertaken with a sample of five smaller cinema sites with the aim of sharing the positive benefits with the wider membership. This work was undertaken with financial support from the British Film Institute.

6.4 The project is due to be completed and made available to all CEA members in Summer 2014. There are already early positive signs emerging from the case study sites, and improvements are being made to the toolkit to make it more user-friendly and accessible.

6.5 During the course of the year, the CEA Energy and Sustainability Working Group met three times to discuss changes in legislation affecting cinemas and also to debate topics on interest and share best practice. The Association is extremely grateful to the members of the Group for their advice and support.

WASTE MANAGEMENT

6.6 The CEA worked during 2013 to advise Scottish members of the imminent implementation of The Waste (Scotland) Regulations 2012, which would from the beginning of 2014 see all cinemas – along with other businesses – required to separate different streams of recyclable waste.

6.7 In liaison with the Scottish Environment Protection Agency (SEPA), the Association worked to ensure that all members understood the implications of this legislation and were able to prepare to implement it in as cost-effective a way as possible. Discussions with SEPA representatives at a meeting of Scottish branch members in October was particularly useful in ensuring that both sides understood the practical challenges that these changes would present.

7 KEY PARTNERSHIPS

INTERNATIONAL

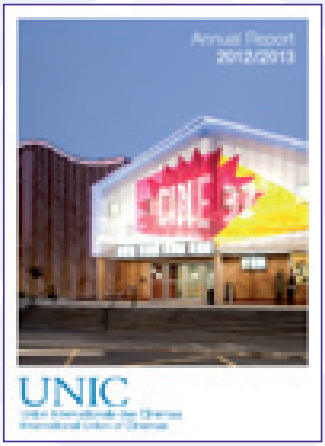
7.1 Throughout 2013, the CEA continued to draw strength from its partnership with organisations across a wide range of cinema territories as well as closer to home.

NATO

7.2 The Association's relationship with the National Association of Theatre Owners (NATO), representing cinema exhibitors in North America and beyond, remained particularly strong, with contacts between the two organisations spanning a wide range of issues such as digital and 3D cinema, other emerging cinema technologies, film theft, disability and access, music rights, film classification, trailer length and public health issues.

UNIC

7.3 The CEA also enjoyed continuing dialogue with and support from European colleagues through its membership of the Union Internationale des Cinémas (UNIC – International Union of Cinemas), the European grouping of cinema trade associations and key operators. At meetings in Istanbul, Cannes, Barcelona, Brussels and Paris, the Association shared thoughts and information with European colleagues on admissions, release windows, film theft, digital roll-out, music rights and disability and access.



7.4 In May, at the UNIC AGM, CEA Chief Executive Phil Clapp was elected President of the organisation, initially on a two year term. Colleagues from France, Denmark, Spain, Italy, Germany and Switzerland were also represented on the UNIC Board of Directors.

7.5 2013 saw a strengthened UNIC – under the leadership of CEO Jan Runge - fulfil its mandate to provide a strong exhibition voice with the European Parliament and Commission. Through a series of bilateral meetings, policy breakfasts, roundtable groups and in correspondence, the organisation sought to stress and protect the cultural, economic and social value of the cinema exhibition sector and to resist often ill-judged efforts by European politicians and officials to intervene in a market approach which works well for the vast majority of territories, including the UK.

7.6 This was particularly true of the Commission's efforts to amend or influence the release strategy for individual films, where it sought to stimulate a market for day and date and similar short window releases. The strong view put forward by UNIC – one wholly supported by the CEA – was that these matters were best left to the market, and that artificial means of intervening in the market might in fact have the opposite effect to that sought by the Commissions, bringing into question the viability of a large number of smaller cinemas. As the year closed, that debate continued.

7.7 The year also saw the growing success of the CineEurope event, now in its second year in Barcelona. The official convention of UNIC, CineEurope brought together over 3,000 professionals from across the European cinema industry to discuss issues of common concern and learn more about emerging technologies and business challenges.

NATIONAL

CEA Board

7.8 It was recognised in 2013 that consolidation in the UK cinema sector in recent years had resulted in the loss of a number of voices from around the CEA Board table, with a resultant loss of diversity in terms of business size and composition. To address this, changes were agreed to the relevant eligibility criteria such that any member operating five or more sites was guaranteed a place at that table. As a result of this, we were able to welcome Scott Cinemas, Curzon Cinemas, Everyman and Movie House Cinemas as Board members.

CEA branches

7.9 The CEA Executive Board, and the wider membership, were deeply saddened by the death in May 2013 of longstanding Board member Gerald Parkes MBE. Gerald was a much-admired and respected representative of smaller operators and his loss was deeply felt by all who knew him.

7.10 The CEA draws strength not just from key circuit operator members, but also from a large number of smaller operators across the breadth of the UK. These members have historically been organised into regional branches, which have in recent times been more or less active. During 2013 particular efforts were made to support these groups, with meetings held in Devon, Cornwall and West of England, Scotland, London and the North.

Other partners

7.11 The CEA continued to enjoy the support of a wide range of industry and other partner organisations throughout the year. Principal amongst these were colleagues in film distribution, with which the Association discussed a wide range of strategic and operational issues, ranging from the endpoint for the supply of 35mm film, to file nomenclature to trailer classification to the availability of accessible formats.

7.12 Many of the other key partner organisations without whose support the CEA could not do its work are mentioned elsewhere in this report, but also included the Independent Cinema Office, the Association of Independent Film Exhibitors, the British Screen Advisory Council, Creative Skillset, the British Federation of Film Societies, the British Kinematograph Sound and Television Society, the British Video Association, the screen advertising agencies Pearl and Dean and Digital Cinema Media, Moving Picture Distribution, NFT and DHL. Particular thanks are due to colleagues at IHS (formerly Screen Digest) for their support across the year in providing key statistics and data.

7.13 As noted elsewhere, 2013 also saw good dialogue across a range of issues with colleagues at the British Film Institute as they sought to deliver on the demanding agenda set out by the Government Film Policy Review. The CEA welcomed these opportunities as it sought in particular to find ways to engage with the Department for Culture, Media and Sport.

7.14 The CEA is grateful to all those who supported its work during the year.

8 CEA FINANCE

Excerpts from the Cinema Exhibitors' Association Ltd Accounts 2013

Profit and loss account for the year ended 31 December 2013

	2013 (£)	2012 (£)
Turnover	487,608	487,957
Administrative expenses	(424,392)	(509,423)
Operating profit/(loss)	63,216	(21,466)
Other interest receivable and similar income	(2,455)	795
Profit/(loss) on ordinary activities before taxation	65,671	(20,671)
Tax on profit/(loss) on ordinary activities	491	-
Retained profit/(loss) on year	**65,180**	**(20,671)**

Balance sheet as at 31 December 2013

	2013 (£)		2012 (£)	
Fixed assets				
Tangible assets		1,434		3,345
Current assets				
Debtors	82,768		342,012	
Cash at bank and in hand	466,956		349,304	
	549,724		691,316	
Creditors: amount falling due within one year	(213,048)		(421,731)	
Net current assets		336,676		269,585
Net assets		338,110		272,930
Reserves		272,930		293,601
Profit and loss account		65,180		(20,671)
Members funds		**338,110**		**272,930**

PAST PRESIDENTS

E M Barker	1912 – 1913
R Tennyson-Jupp, Dr	1913 – 1914
W Fowler-Pettie	1914 – 1915
A E Newbold, MP	1915 – 1920
R R Goodwin, CBE, MCC	1920 – 1921
C G MacDonald, JP	1921 – 1922
E Trouson, Ald, JP	1922 – 1923
A J Gale, Maj, OBE, MCC, JP	1923 – 1924
J H Dovener, Counc	1924 – 1925
Thos Ormiston, CBE	1925 – 1926
W N Blake	1926 – 1927
E Hewitson, Counc	1927 – 1928
H Victor Davies	1928 – 1929
F H Cooper	1929 – 1930
W Stephenson	1930 – 1931
R V Crow	1931 – 1932
R E Richards, Ald	1932 – 1933
J Welsh, Baillie	1933 – 1934
J Pollard, Counc, JP	1934 – 1935
R Dooner	1935 – 1936
T H Fligelstone, Col, MC	1936 – 1937
C P Metcalfe	1937 – 1938
M A Nyman, BSc	1938 – 1939
E J Hinge, CBE	1939 – 1940
H P E Mears, Ald, OBE, JP	1940 – 1941
S K Lewis	1941 – 1942
W J Speakman	1942 – 1943
H Simpson, Counc	1943 – 1944
Sir W S Clift	1944 – 1945
G H Scarborough	1945 – 1946
Fred A Prior, FSAA	1946 – 1947
B T Davis, FSAA	1947 – 1948
Dennis C Walls	1948 – 1949
Sir Alexander B King, CBE, DL, LD, JP	1949 – 1950
A B Watts, FSAA	1950 – 1951
H P E Mears, Ald, OBE, JP	1951 – 1952
W J Speakman	1952 – 1953
J W Davies, OBE	1953 – 1954
C H Whincup	1954 – 1955
R H Godfrey, JP	1955 – 1956
B T Davis, FSAA	1956 – 1957
George Singleton, CBE	1957 – 1958
E J Hinge, CBE	1958 – 1959
J D Richards	1959 – 1960
Alfred Davis	1960 – 1961
S K Lewis	1961 – 1962
Miles M Jervis	1962 – 1963
G L Barber, Ald, JP	1963 – 1964
Peter King, MA	1964 – 1965
J F Wood	1965 – 1966
Wyndham Lewis, OBE, JP	1966 – 1967
H S Roelich	1967 – 1968
J K Stafford Poole	1968 – 1969
Wyndham Lewis, OBE, JP	1969 – 1970
Kenneth Rive	1970 – 1972
Victor Chapman	1972 – 1973
Miles P Jervis	1973 – 1974
R J Dowdeswell	1974 – 1976
C W A Painter	1976 – 1977
S Shurman	1977 – 1979
D M Cameron	1979 – 1980
R J Dowdeswell	1980 – 1982
G W Rhodes	1982 – 1984
D F Chamberlain	1984 – 1985
E J Lee, MBE	1985 – 1990
M J Vickers	1990 – 1992
I N Riches	1992 – 1993
R C Warbey	1993 – 1994
S Fishman, CBE	1994 – 1999

CEA Executive Board Chairman

Barry Jenkins, OBE	1999 – 2005

CEA Ltd Executive Board Chairman

Barry Jenkins, OBE	2005 – 2012

Cinema Exhibitors' Association Ltd Executive Board Members - April 2013

CHIEF EXECUTIVE - Phil Clapp
HONORARY TREASURER - Mike Vickers

Larger Operator Board Members / Nominated Substitutes

Cineworld Cinemas - Matt Eyre / Steve Wiener / Crispin Lilly
Empire Cinemas - Justin Ribbons / Paul Baxter/ Craig Jones
Natl Amusements (UK) - Duncan Short / Julian Carr / Richard Leonard
Odeon Cinemas - Roger Harris / Adrian Walker
Vue Cinemas - Tim Richards / Steve Knibbs / Mark de Quervain

Smaller Operator Board Members / Nominated Substitutes

Andrew Poole – Pavilion, Galashiels / David Morris - New Picture House, St Andrews
Gerald Parkes - Parkway Entertainment / James Collington – Savoy Cinemas
Graeme Cotton – Electric Palace Picture House, Cannock /
Robert Johnson – Kavanagh Cinema, Herne Bay
Mike Vickers / Stuart Hall
Adam Cunard – Picturedrome Cinemas, Bognor Regis / Mark Williams – WTW Cinemas, Cornwall

CEA Head Office

Phil Clapp
Dee Davison
Annette Bradford

22 Golden Square, London W1F 9JW (now 3 Soho Square, London W1D 3HD)
T: 020 7734 9551 **F:** 020 7734 6147
E: info@cinemauk.org.uk **W:** www.cinemauk.org.uk

Cinema Exhibitors' Association
3 Soho Square, London W1D 3HD
Tel: 020 7734 9551
www.cinemauk.org.uk

the cinema exhibitors' association limited