Promoting the big screen

Annual Report 2015

UK CINEMA association

Promoting the big screen

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EXPLANATORY NOTE
In May 2015, the Executive Board of the Cinema Exhibitors' Association agreed to a change of name for the organisation such that it would become the UK Cinema Association.

While this new branding is used throughout this report, some of the activities set out here were undertaken under the auspices of the Cinema Exhibitors' Association (CEA).

Introduction

2015 was a record-breaking year for UK cinema box office.

An exceptionally strong film slate, including *Star Wars: the Force Awakens*, which went on to become the highest-grossing UK film of all time, combined with the programming flexibility offered by digital cinema technology to see revenues increase by a staggering 17.3 per cent. Alongside an impressive 9 per cent increase in admissions, 2015 represented a period of exceptional strength for the sector.

That success also had its roots in a continuation of the trend in recent years whereby film distribution colleagues observed a 52 weeks, 12 months of the year release strategy. The success of films released in the Spring and Autumn in particular underlined the benefits of such an approach, not least for the cinema-going public.

While the Association took the decision to rebrand itself during the year to become the UK Cinema Association, its core role remained essentially unchanged, working with both members and colleagues from across the sector on a wide range of strategic and operational issues and lobbying politicians and policy-makers on matters of importance to the industry.

A key development during the year was the launch of the ground-breaking *Meerkat Movies* 2 for 1 cinema ticket promotion. The result of a lengthy and rigorous tender exercise, the industry was fortunate to find in comparethemarket.com a hugely creative and ambitious new partner, and one willing to invest to make the promotion the largest of its kind ever seen in the UK.

Elsewhere the UK remained an example of global best practice when it came to content security, primarily as a result of a strong partnership between the cinema sector and colleagues at FACT. Amongst many successes during the year was the conviction in December of five members of an underground piracy group, sentenced to more than 17 years imprisonment. This was the first prosecution of such a 'release group', in this case responsible for illegally sourcing and releasing more than 2,500 films online, with a resultant loss to the industry of at least £5 million.

Throughout 2015, the Association remained in dialogue with the British Film Institute (BFI) as it continued to develop new audiences for British independent and specialised film. While some issues remain, the mainstream cinema sector remains ready to support this agenda, and indeed the BFI's work in engaging children and young people, where the UK cinema sector provides significant financial and in-kind support for the work of the organisation Into Film.

Amongst other key areas of Association activity were work on disability and access, energy efficiency, cinema security, entertainments licensing, film classification and skills and training.

The 2015 General Election provided a focal point for the Association's political lobbying efforts, which during the year also included work on the new National Living Wage, the Apprenticeship Levy, business rates, classification of screen content and public health issues.

The Association remains dependent on – and hugely grateful for – the support and engagement of its Executive Board, its wider membership and partners across the industry in its attempts to provide a high level of service to operators large and small as they endeavour to ensure that as many of the public as possible choose to see films in their best possible setting – the cinema theatre.

UK cinema performance – an overview

01

The global sector

1.1 As shown in the table below, the strong performance of the UK cinema sector in 2015 was for the most part reflected across Europe, where a large number of other territories experienced significant growth. The exception here was France, which was unable to match a very strong 2014, where admissions had been boosted by an unusually strong domestic film slate and the success of a national audience development programme.

1.2 In terms of box office revenue, the year saw the UK overtake France to cement its standing as the fourth largest global cinema market behind the US, China and Japan respectively.

Country	Cinema admissions 2015 (million)	Cinema admissions 2014 (million)	Change (%)
Austria	15.8	14.1	12.1
Denmark	14.2	12.3	15.2
Finland	8.8	7.4	18.9
France	206.0	209.0	–1.4
Germany	133.1	121.7	9.4
Ireland	15.2	14.4	5.6
Italy	99.4	91.5	8.6
Luxembourg	1.3	1.1	15.0
Netherlands	33.0	30.8	7.0
Norway	12.0	11.1	8.6
Portugal	14.5	12.1	20.2
Russia	175.8	175.3	0.3
Spain	94.0	87.4	7.5
Sweden	17.0	16.3	4.7
Switzerland	14.7	13.2	11.4
Turkey	60.5	61.2	1.3
United Kingdom	**171.9**	**157.5**	**9.0**

Source: UNIC

1.3 The monthly figures for UK admissions in 2015, alongside those for 2014, are set out below.

1.4 While films such as the *The Theory of Everything* confirmed the continuing importance of the BAFTA season to UK box office, it was if anything the increasing (and welcome) willingness of film distribution colleagues to release strong film content throughout the year which proved key to success in all four quarters.

Month	Cinema admissions 2015	Cinema admissions 2014	Change (%)
January	15,386,610	15,187,114	1.3
February	15,162,922	14,332,398	5.7
March	11,544,674	10,360,563	11.4
April	15,125,895	12,678,793	19.3
May	12,665,652	12,601,600	0.5
June	13,254,544	10,399,406	27.5
July	15,869,636	13,275,721	19.5
August	14,374,123	17,066,765	–15.8
September	9,238,723	8,517,719	8.5
October	15,407,383	13,273,205	16.1
November	15,410,911	12,690,141	21.4
December	18,489,325	17,116,216	8.0
Total	**171,930,400**	**157,499,641**	**9.0**

Source: Cinema Advertising Association/ComScore

1.5 The period from January-March in particular saw films across a range of genres engage audiences and drive admissions. These included titles such as *Kingsman: The Secret Service, Big Hero 6, Home, Taken 3* and – most importantly in box office terms – *Fifty Shades of Grey*.

1.6 April saw the arrival of *Fast and Furious 7*, the latest and by some measure best-performing edition of that franchise. Together with the even bigger *Avengers: Age of Ultron* later that same month, admissions surged far ahead of those for the same period in 2014, that momentum being maintained with the release in May of *Pitch Perfect 2* and *Mad Max: Fury Road*.

1.7 It was the Summer months however when box office truly took off, with titles such as *Minions, Jurassic World* and *Inside Out* proving hugely popular with the family audience. The lack of similarly engaging films in August was therefore all the more disappointing, resulting in admissions for that month dropping well below 2014 levels.

1.8 The final quarter heralded a period of exceptional success. Presaged by the strong performance of *The Martian*, the arrival of the latest James Bond film *SPECTRE* (which went on to become the third highest-grossing UK film of all time) and *The Hunger Games: Mockingjay Part 2* served to provide a foundation for the hugely-anticipated release in late December of *Star Wars: the Force Awakens*. Taking almost £90 million in its first two weeks, the film subsequently went on to become the highest-grossing film ever at the UK box office.

1.9 The strong overall performance of the UK cinema sector in 2015 was in part built upon another exceptional year for British films, where UK-qualified content accounted for an incredible 44.5 per cent of box office, by some measure a record.

1.10 Within those same headline figures, digital 3D remained an important strand of box office income during the year. Of the top ten films, seven were made available in the 3D format. Revenue from 3D screens represented just over 10 per cent of the overall box office total in 2015, down from 12 per cent the previous year, confirming a general trend towards audiences exercising increasing choice over which films they see in this format.

02

Film theft

2.1 During 2015, the Association supported and represented its members across a range of strategic issues. Below is a headline account of the relevant activities of the Association in these areas.

2.2 Efforts continued throughout the year to maintain the sector's success in tackling film theft at UK cinemas, something which has seen an exceptionally small number of films recorded at member sites in recent years. While the lack of up-to-date data on the overall impact of film theft on the industry remains a frustration (the last reliable figures dating from 2011, when financial losses to the UK cinema sector were calculated at some £216 million or 21 per cent of annual box office) there remains no lack of determination on the part of UK cinema operators to play their part.

2.3 The Association 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

2.4 With support from the Federation Against Copyright Theft (FACT) Film Protection Programme, funded by the Film Distributors' Association (FDA), the UK remains one of the most effective territories in preventing illegal recordings in cinemas. 2015 saw a significant record for the Programme since its launch in 2006, marking an unprecedented 27 months of successful protection, with no films being illegally sourced from UK cinemas.

2.5 The vigilance of cinema staff remains a significant factor in preventing film theft. Across 2015, FACT conducted 78 training sessions at UK cinemas, providing over 2,500 members of staff with information and advice on how to detect illegal recording. This extensive training was key in the almost ten per cent increase during the year in the number of attempts to record films in cinemas successfully disrupted by staff.

2.6 The Film Protection Programme also continued to recognise cinema staff for their efforts in tackling film piracy. In October, 13 employees from Cineworld, Empire and Odeon were rewarded at a special ceremony in London for successfully disrupting attempts illegally to record films including *Fast and Furious 7, Pitch Perfect 2* and *Minions*.

2.7 Alongside this in-cinema activity, during the year FACT also continued its efforts to target 'source' piracy, identifying those responsible for industry leaks, thefts and illegal distribution. September saw the lengthy period without a UK cinema recording come to a close, with two illegal film uploads traced back to a cinema in Nottingham. FACT immediately launched an investigation and within seven days the suspect was arrested. He remains on bail whilst the investigation continues and is currently prohibited from entering any cinema in England and Wales.

2.8 In December a landmark prosecution for FACT saw five members of an underground piracy group sentenced to more than 17 years imprisonment. This case was the first time that a 'release group' on this scale had been tried and prosecuted. The five men formed an integral part of an online community that sought recognition for being the first to illegally source and release the latest films and for producing the 'best' illegal quality copies. The group were collectively responsible for illegally releasing more than 2,500 films online and accepted their actions caused losses to industry in excess of £5 million.

Industry Trust for IP Awareness

2.9 During 2015 the Association continued to support the work of the Industry Trust for IP Awareness, which aims to reduce levels of copyright infringement through a range of education and awareness programmes that seek to inspire audiences to value content and choose legitimate sources (across all platforms) for their film viewing. During the year the Trust revisited its messaging activity, providing a greater focus on the premium cinema experience, driving greater engagement with the sector while promoting the value of film in all formats.

2.10 Recognising the fact that research has consistently shown that many cinema-goers are also avid consumers of online content, during 2015 the Trust's activities also highlighted the increasing threat of new routes to infringement through 'apps' and so-called IPTV boxes.

2.11 In addition to its role in monitoring the impact of infringement, the Trust also continued to provide a host of positive 'pro-IP' messages delivered through its content-led *Moments Worth Paying For* campaign. During the year, exposure to the campaign – which continued to benefit from the donation of valuable cinema screen time by Association members – increased significantly, reaching over 33 million cinema goers (compared to 16.6 million in 2014).

2.12 The campaign benefited from increasing engagement with colleagues in film distribution, leading to collaboration on a range of titles including: *Magic Mike XXL; Spooks; Snoopy and Charlie Brown: The Peanuts Movie; Inside Out*; *Suffragette;* and *Star Wars: The Force Awakens*. All directed users to the industry-funded site FindAnyFilm.com (*www.findanyfilm.com*), which provides details of all legally-available sources in all available formats.

2.13 The Trust continued its work with another industry-supported body, Into Film, to broaden the reach of its awareness-raising activities, delivering in this case a host of in-school learning resources promoting the value of film entertainment and the premium experience of cinema. During the year, dedicated trailers reached over 565,000 children and young people through the Into Film Festival, with over 64,000 benefiting from classroom-led learning resources.

Alliance for Intellectual Property

2.14 The Association continued to support the lobbying efforts of the Alliance for Intellectual Property, which worked in advance of the General Election to ensure that messages around the importance of IP were heard by the main political parties. Following the Election, the Alliance engaged in regular contact with Ministers, Shadow Ministers, MPs, Peers and officials on a range of issues, including a meeting at Number 10 in November.

2.15 The European Commission's Digital Single Market proposal – which would potentially see disruption of the long-established and successful process by which films are licensed for distribution on a territory-by-territory basis – continued to be a key priority. The Alliance met to discuss this with Commissioners, including Vice President Ansip, officials and MEPs, pressing the need for careful and evidence-based consideration of any proposals that sought to alter the way that copyright, intellectual property and business models function. The Alliance also contributed to the debate on enforcement – again stressing that protection of IP must work hand in hand with legislation in other areas.

2.16 During 2015, the Association continued to work both with members and a wide range of other colleagues to ensure the UK cinema sector retained its position as a World leader when it comes to meeting the needs of disabled customers.

2.17 In doing so, the Association was supported by the advice and guidance of its retained disability advisors Freeney Williams, and by its longstanding Disability Working Group (DWG). Comprising representatives from circuit and smaller cinema operators as well as colleagues from film distribution, technology suppliers and organisations representing disabled people, the DWG met four times during the year, but was involved on a regular basis across a range of relevant issues.

2.18 The Association remains hugely grateful to all of those that support its work on these important issues, and who help to make the cinema-going experience as enjoyable and accessible as possible for all disabled customers. Details of individual workstrands are set out below.

Training and awareness

2.19 The Association has in the past developed a number of training resources for cinema staff to help them deal with issues around disability and access, most notably the 'Welcoming Disabled Customers' film and workbook produced in 2012. Discussion with key members in 2015 however suggested that the sector might benefit from an even more proactive approach, particularly in ensuring that managers and senior staff were equipped with the skills to deal with challenging situations.

2.20 In order to address this need, during the year the Association, in partnership with Freeney Williams, developed and delivered a series of training workshops for cinema managers. The aim of these was to enable participants better to deal with challenging situations, raising awareness of the legal requirements facing cinemas but also building individual confidence and awareness.

2.21 The three sessions delivered during the year – to senior staff from a range of member companies – were very well-received, with each workshop providing a good opportunity to help build confidence and allow colleagues to share their experiences. Building on the lessons learnt from the initial sessions, the Association will continue with this programme during 2016.

Subtitling

2.22 Over the last decade, subtitled screenings for deaf and hearing-impaired customers – sometimes called 'open caption' screenings – have grown significantly. There are now over 1,500 subtitled screenings every week in UK cinemas. While this is hugely positive, the general reluctance of the wider audience to attend subtitled screenings means that significant further increases in provision are unlikely in the medium term.

2.23 The Association continued in its efforts during the year to address this impasse, adopting a dual strategy of raising awareness (and hopefully take-up) of subtitled and other accessible screenings as well as encouraging industry partners to consider the development of other approaches to captioning.

Information on subtitled screenings

2.24 The Association continued to support *www.yourlocalcinema.com*, a longstanding listings website which provides information on current and upcoming subtitled screenings.

2.25 However, during the year, the Association also began to look again at its approach here, resulting in the decision to establish a refreshed central 'hub' website for all industry information on accessible screenings in UK cinemas. As these ideas developed, the plans for a new site – to be called 'Accessible Screenings UK' – took shape, the objective being to providing listings not just for subtitled but also audio described and so-called 'Autism Friendly Screenings', described in more detail below.

2.26 The Association believes there is real potential here not only to promote the good work being undertaken by many across the sector but also to help grow the audience for accessible screenings of all kinds. The new site – to be launched in 2016 – will also provide detailed information on the access features available at each member site, news and updates on relevant developments across the industry and a mechanism to allow audience members to feed back their own experiences.

New approaches to subtitling

2.27 As noted above, given the general reluctance of the wider audience to attend subtitled screenings, the Association has for some time been working with members and other partners to explore other approaches, in particular the provision of personalised subtitling solutions, where subtitles – or 'closed captions' – are made available to the viewer through specially-provided glasses or on individual screens. The hope is that this would serve to address the current economic barriers to the wider delivery of subtitles and potentially open up all screenings to deaf and hearing-impaired customers.

2.28 Having undertaken a 'test day' on the (then) available systems with an invited audience of deaf and hearing-impaired people in March 2013, the Association has since then kept in contact with the key technology companies involved, but has in truth seen little progress in finding a viable solution.

2.29 2015 saw a further setback in this area when the most likely solution – Sony's Entertainment Access Glass – was withdrawn from markets outside of the US for business reasons. With no other obvious candidate in prospect, the Association continues to work to encourage innovation in this area.

Autism Friendly Screenings

2.30 One of the key developments in accessible cinema in the last few years has been the growth in provision of Autism Friendly Screenings (AFS). These are shows where sound volumes are slightly reduced, lighting left on at a low level and audience members are allowed to move around and make noise. AFS have become increasingly popular for people on the autism spectrum and their families, who otherwise feel reluctant to attend the cinema.

2.31 Working with relevant representative groups at both the national and local level, a significant number of Association member sites now run regular AFS, and 2015 saw another significant increase in provision in this area, with consistent feedback from operators of the benefit this activity provides in growing a loyal local audience.

2.32 As part of its efforts to encourage further growth in provision, in February the Association once again invited members to mark World Autism Awareness Day (Wednesday 2 April) by hosting AFS at their theatres on and around that date. The response was again excellent, with over 1,000 screenings during that week, a 60 per cent increase on the previous year. Many members took the opportunity to put on their first such screening, of which a large number have now made these a regular feature at their sites.

CEA Card

2.33 The CEA Card scheme, established well over a decade ago, provides one way in which cinemas can meet their obligations under the disability provisions of the Equality Act 2010 to make reasonable adjustments in order to support disabled people in visiting their local cinema. A person holding a CEA Card is entitled to a free ticket for someone to accompany them to the cinema.

2.34 During the course of the year, an increasing number of applicants took advantage of the more straightforward online application process introduced in 2014, resulting in continued strong demand for the scheme, with over 100,000 new Cards issued and over 1 million free tickets provided to companions to ensure that disabled customers were better able to enjoy their cinema-going experience.

Release windows

2.35 The Association strongly supports the principle of maintaining 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 that means that so many cinemas across the UK remain key focal points for their local communities.

2.36 While decisions on the release window around any individual film are a commercial matter between exhibitors and the relevant distributor, and not therefore something in which the Association has any role, it would be concerned by any moves taken in this regard which were at the expense of cinema exhibition, a part of the film industry which continues to perform strongly and provide a solid foundation for subsequent elements of film revenue.

2.37 During the course of 2015, the average theatrical release window decreased from 112 to just over 108 days (where it had stood in 2013). As has increasingly been the case in recent years however, this headline figure masked a wide range of practices, with a number of films being released on very short windows of less than two weeks and an increasing number observing windows of 30-90 days.

British Film Institute (BFI) funding

2.38 The Association remained actively involved in a number of strands of the BFI Five Year Strategy *Film Forever*. More details on specific elements of this are set out below.

BFI Film Audience Network

2.39 The work of the Film Audience Network (FAN) – a broad coalition of film venues, co-ordinated on a regional basis by nominated Hub Lead Organisations (HLOs) and supported by £7.5 million of Lottery funding over four years – continued during 2015.

2.40 The Association strongly supports the underlying aim of the FAN – to grow audiences for British independent and specialised film – and a number of Association members act as HLOs within the Network. While films from the studios and other major distributors remain the key building blocks of any successful year for UK cinema, there remains a significant audience for more specialised content which needs to be nurtured and grown.

2.41 Dialogue continued through the year with the BFI and hub members on the potential contribution of the mainstream sector to the work of the Network. While progress was undoubtedly made, there remain structural barriers to swift progress (on both sides).

BFI Neighbourhood Cinema

2.42 BFI Neighbourhood Cinema aims to support community groups wishing to establish or sustain local film venues in 'under-served' areas. The Fund provides relatively small amounts of funding (from an overall budget of £2 million across four years) to provide disk-based projection equipment, seating, screens and black-out curtains etc.

2.43 Having expressed concerns previously around the extent to which some funding decisions might impact on existing mainstream provision, the Association was grateful to be more closely involved in these considerations, not least so it could identify instances where its members might be able to provide expertise and more sustainable support.

BFI 5-19 film education scheme

2.44 Through the cross-sectoral body Cinema First, the UK cinema industry provides annual funding of £700,000 to Into Film (the delivery partner for the £6.5 million per year BFI 5-19 film education scheme), in order to support its work in introducing children and young people to the big screen experience, with the overall aim of making them part of the cinema audience of the future. The key strand of activity here is the Into Film Festival, which aims to build stronger relationships between cinemas, schools and young people.

2.45 The 2015 Festival, which ran across three weeks in November, saw over 415,000 children and young people and their teachers attend over 2,700 screenings, special events and previews at 520 cinema sites. The Festival was supported by all of the major UK cinema circuits as well as a large number of smaller operator members of the Association. Pleasingly, over half of the programme was accessible, including audio described, subtitled and 'Autism Friendly' screenings.

2.46 Further Festival highlights included a 'Pupil Premiere' of *He Named Me Malala*, including a live satellite-linked Q&A with actress Emma Watson, who posed questions suggested by children and young people across 80 cinema sites to the subject of the film, Malala Yousafzai. This event eventually received over 5 million views. Amongst other speakers from across the industry were actor Jonathan Pryce, writer Abi Morgan and a range of professionals explaining their work in areas ranging from visual effects to costume design to wig-making. A specially-commissioned pre-reel championed the 'gold standard' nature of the big screen experience and encouraged return visits.

2.47 Into Film is also supported by the industry to encourage discussion on issues around copyright and film theft. Through a specially-commissioned trailer, supported by tailored resources and communications, over 600,000 children and young people during the year were provided with a greater understanding of the issues around Intellectual Property and encouraged to value the creativity and expertise that enables the film industry to flourish.

2.48 The organisation has also been active in supporting new releases, with content on the *Get Into Film* YouTube channel including classroom resources for films such as *Snoopy and Charlie Brown: The Peanuts Movie; Macbeth; Robinson Crusoe* and *Suffragette*. These have proved very popular, resulting in over 8,000 downloads.

2.49 As the year closed, plans were already in development to build on the above success, both through the 2016 edition of the Festival and a range of other cinema-related activities.

Digital cinema

Digital cinema technology

2.50 The lengthy process of digitisation of the UK cinema sector having now concluded (in no small part through the Digital Funding Partnership, which facilitated the conversion of almost 300 smaller operator screens), the Association had during the previous year signalled its changing role in this area, having in late 2014 sought to provide members with an objective view of the new technological landscape through its conference *Cinema of the Future: Innovation Driving the Audience Experience*.

2.51 Throughout the year it continued to offer advice and guidance, mindful that this new cinema landscape involved a wide range of potential upgrades and potential improvements to the cinema experience where the benefits of – and business case for – change might not always be immediately apparent.

Event cinema

2.52 2015 saw a continuation of the growth in interest and popularity of event cinema (previously termed 'alternative content') which had been facilitated by the conversion to digital cinema technology. During the year, this represented around 3.2 per cent of total box office, although a much higher proportion for some individual member companies.

2.53 The Association continued throughout the year to liaise regularly with the Event Cinema Association on issues of shared interest.

Music rights

2.54 The issue of music rights collection remains a key concern for cinema operators, not just in this country but across Europe. In the UK, music rights payments to songwriters and composers are collected by the nominated collecting agency PRS for Music, with cinemas required to pay a fee for music played in their cinemas, whether as part of a film or event or simply as background music in foyers and auditoriums.

2.55 The Association and its members support the right of all creative people to be rewarded for their work. However it is important that the royalties paid are a fair and appropriate reflection of the value that music provides to the overall experience. There is also the need to ensure transparency in the system so that it is clear how performers are rewarded for their work.

2.56 Over a period of several years, the Association has consistently argued on behalf of its members that the fees demanded by 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 the fees paid are calculated either on the basis of 1 per cent of box office or through a 'pence per admission' (PPA) measure – 5.5p in 2015.

2.57 Payments by both measures have risen consistently in recent years. Analysis undertaken on behalf of the Association in 2012 confirmed that – at a time when admissions had been relatively flat – box office growth in particular had been driven almost exclusively by premium payments for additional developments such as 3D and VIP seating. As a result, PRS and its members, who have not made any contribution to investment in this area, have still seen significant benefit.

Film Complaints Panel

2.58 Since 2013, PRS had been involved in a series of compliance audits, now informally extended across the entire Association membership. With that exercise ongoing, and with a desire not to prejudice that process, the Association chose not to engage in further discussion with PRS in 2015, until such time as all relevant issues had been resolved.

2.59 The Film Complaints Panel was established in 1994 following a report into the industry by the (then) Monopolies and Mergers Commission. The Panel was intended to provide an informal mechanism by which commercial disputes between individual operators and film distributors could be considered and resolved. While the number of cases it had formally heard since its establishment was comparatively few, its continued existence was nevertheless seen as an important commitment by companies on all sides to ensuring that the interests of the customer remained paramount.

2.60 Following discussions in 2014 between the Association and colleagues at the Film Distributors' Association (who together with an independent Chair form the Panel), it was agreed that changes in the nature of the sector over recent years demanded a fresh look at its constitution. This coincided with the decision of the long-standing Chair, Stan Fishman CBE, to stand down from his role, with the grateful thanks of both Associations for his years of service.

2.61 In October it was announced that Thomas Dillon had been appointed to Chair the revised Panel, which would work against new terms of reference, agreed by both Associations so at to more closely align with concepts of fair and open competition in the sector.

03

General Election

3.1 2015 saw a range of policies and strategies emerge from Government which presented a challenge to the interests of the Association and its members. A summary of areas in which the Association sought to influence the political and public policy agenda is below.

3.2 The key political event of 2015 was of course the General Election, where the Association worked to understand, evaluate and where possible influence relevant proposals coming out of the main political parties.

3.3 Analysis of the respective party manifestos in the run-up to the May vote suggested that key areas of concern for the sector centred on areas around public health, including proposals on limiting the sale and advertising of certain food and drink categories, and on employment issues, where there were various proposals which might see more robust intervention on issues such as zero/low hours contracts (a previous matter of concern for the sector) and on minimum wage levels.

Pro-cinema messaging

3.4 Either side of the Election, the Association continued its pro-cinema messaging campaign, seeking to ensure that key Parliamentarians and opinion-formers better understood the value of the industry in economic, social and cultural terms.

3.5 Working with colleagues at PSA Communications, an ongoing programme of visits to local cinemas by MPs and other Parliamentarians continued through the year, reaching a total of 145 visits since its inception. Feedback on these was extremely positive, with the chance of a 'behind the scenes' visit and the opportunity to speak in depth to cinema staff proving an illuminating experience for many.

3.6 2015 also saw a continuation of the Association's quarterly Parliamentary Newsletter – *The Big Picture* – which provided MPs further information and background on industry and political developments. Editions in March and October provided updates on a range of issues including *Meerkat Movies*, disability and access, the Apprenticeship Levy and business rates.

3.7 The overall objective of these activities remains to build a strong and sustained relationship between politicians and their local cinema with the aim of establishing a ready-made 'lobby' of support as and when the sector require support on specific legislative or regulatory challenges of the kind set out below.

Public health

3.8 The Association has over recent years been in regular discussion with officials at the Department of Health responsible for taking forward policy around healthy eating. Most recently this centred on the Public Health Responsibility Deal, a Government initiative which encouraged businesses – including key Association members – to commit to various pledges around the marketing, sale and composition of their food and drink offerings.

3.9 In these discussions, the Association sought to reassure Government that all cinema operators were mindful of concerns around public health, and were taking steps both to allow customers to make informed choices on what they eat and drink during a visit to the cinema, and to provide a wider range of low or no-calorie options.

3.10 During the course of 2015, and in particular in the run-up to the General Election, the language around this issue both from Government and from the main Opposition Parties became increasing strident, in part driven by the publication at key points during the year of a series of reports – variously from The Labour Party, the Local Government Association, and most importantly from Public Health England – calling for greater intervention by Government and other public agencies in this area.

3.11 These reports gained a good deal of media coverage, in turn resulting in political pressure on the sector to 'do more' and raised the possibility of a so-called 'sugar tax', a levy on high sugar products, in particular soft drinks. Supporters of such a measure saw this as a way of discouraging the sale and purchase of sugary drinks, despite a lack of evidence of its long-term impact on patterns of consumption.

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Classification of screen advertising

3.12 While willing to play its part in supporting the healthy eating agenda, the Association felt it necessary to remind Government and others that, with an average of less than three cinema visits per head of population, the cinema sector was highly unlikely to be a significant source of concern about levels of obesity amongst the public. Nevertheless, as well as supporting members in identifying ways forward on healthy options and more nutritional information for customers, it also worked with the Cinema Advertising Association to explore the feasibility of greater self-regulation on screen advertising of high fat, sugar and salt (so-called HFSS) foods.

3.13 Those discussions were ongoing as the year ended, and as cinemas – as well as the wider food and beverage industry – awaited the publication of the Government's long-delayed Childhood Obesity Strategy.

3.14 Despite a commitment in May 2013 to remove the dual regulation of screen advertising – whereby any such content needs to be both classified by the British Board of Film Classification (BBFC) and cleared by the Cinema Advertising Association (CAA) – 2015 again saw little real progress on the part of Government.

3.15 This ongoing delay, and the continuation of the existing regime, meant that screen advertising remained less flexible and therefore less competitive than other platforms such as TV and online, with a resultant loss of income. Wishing to overcome that impasse, the Association worked closely with colleagues at the BBFC and CAA in developing an alternative – non-legislative – approach. This would see the regulatory role of the Board in relevant areas delegated to the CAA, removing one tier of regulation without reducing levels of public protection.

3.16 As the year closed, agreement on the detail of this was being finalised, with the hope that these changes could at last be implemented early in 2016.

National Minimum Wage/ National Living Wage

3.17 In the July Budget statement, the Chancellor announced the establishment of a new National Living Wage, a higher level of National Minimum Wage for all employees aged 25 and over, to come into effect from April 2016.

3.18 Given that this had not been the subject of previous discussion or consultation, the announcement of this new requirement – which impacted on all employers, including cinema operators – represented an unexpected additional financial burden and one for which no plans had been put in place.

3.19 While understanding the stated rationale for this measure, in responding to the announcement – and that of subsequent increases in the related National Minimum Wage for workers aged 24 and under – the Association urged Government to be mindful of the cumulative impact of these additional demands on the finances of companies, particularly when taken alongside other initiatives such as the Apprenticeship Levy.

Business rates discount

3.20 The year saw a continuation of the business rates discounts introduced by HM Treasury in 2013 for a range of high street retailers, the intention being to boost high street businesses that drive retail footfall. As in previous years however, in England this did not include cinemas, a large number of whom – given their location – fulfil precisely that role. That omission remained particularly disappointing given the fact that other (arguably less relevant) businesses such as second hand car lots, video rental stores and ticket agencies continued to be included.

3.21 In contrast, in April the Welsh Government confirmed that it would continue to offer this discount to cinemas operators, a welcome position which began in 2013.

04

Pro-cinema messaging

4.1 During the course of the year, the Association continued its efforts to ensure that the voice of UK cinema operators was heard on key issues. Engagement with a wide variety of key contacts in the print, online and broadcast media ensured that they were made aware of the sector's position on matters affecting the industry.

4.2 This work included a continuation of the Association's programme of 'media dinners' whereby key journalists covering not just film issues, but also culture, technology, business, financial and social affairs were brought together with senior executives from the industry to allow open and frank discussion on issues around the sector.

Specific issues

4.3 As well as offering more general commentary, the Association was also called upon to offer specific comment during the year on a number of key developments. Particular examples are set out below.

The Interview

4.4 At the end of 2014, the Association responded to media enquiries following events in the US around the release of *The Interview,* in particular on the willingness of its members to screen controversial films and on issues of cinema security. It was made clear in response that while decisions on which titles were screened were for each member company to take, in general there was no desire to shy away from controversy. With regard to the safety and comfort of audiences, this was of paramount importance and under constant review.

Public health

4.5 As noted previously, issues of public health and the cinema food and drink offer were raised on a number of occasions during the year. In July, a Local Government Association report on the need for greater nutritional information for consumers gave rise to a number of media requests for a comment. The Association made clear that members were aware of the increasing desire of customers to make informed choices in this area, as a result of which many were now providing nutritional information at point of purchase in addition to more detailed advice on company websites.

Disability and access

4.6 The UK is recognised as a World leader in the provision of accessible cinema. In 2015 the Association increased its efforts to publicise this fact, and the good work done in this area across its membership. Examples of this during the year included an article on Autism Friendly Screenings in *The Guardian*, chairing a panel on cinema and access at the Edinburgh Film Festival, a presentation at an RNIB conference on access and culture in September and to read 'interview for RNIB Radio.

Cinema pricing

4.7 The Association has regularly been called on to explain the pricing policies of its members. In September, one of the main tabloid newspapers ran a very partial article that sought to highlight what it presented as the excessive costs of a trip to the cinema. The Association was able to counter this both through identifying basic inaccuracies in the article but also by pointing to the widespread availability of discounts for customers, not least the growing *Meerkat Movies* promotion.

Economic impact of film distribution

4.8 In October, colleagues at the Film Distributors' Association published an analysis which sought to quantify and highlight the economic contribution of that sector to the UK economy. A number of media outlets contacted the Association, clearly seeking to identify areas of difference. The Association was able instead to offer its support for the findings of the report, which served to underline the value of the cinema industry as a whole to the national economy.

Star Wars: the Force Awakens

4.9 The excitement and anticipation that greeted the arrival of *Star Wars: the Force Awakens* proved a unique opportunity to remind the media of the popularity of cinema-going. In December, the Association was not only interviewed in *The Guardian* but also undertook a round of over a dozen BBC Local Radio interviews, underlining expectations (which were ultimately more than realised) around the release of the film and for the cinematic year ahead.

Screen advertising

4.10 At the end of the year, the screen advertising agency DCM found itself in the media spotlight following a decision to decline screening an advertisement produced by the Church of England. This decision was picked up by a number of media outlets that sought to imply differences of opinion between Association members and DCM on this issue. The Association was able fully to support the DCM decision, this being in line with the agency's longstanding policy of not accepting any religious or political advertising on the grounds of appropriateness. Although press coverage continued for several weeks, the clarity of the DCM position, and the inability of the media to find ready dissent in the sector, meant that interest here eventually waned.

Social media activity

4.11 The Association continued to use social media channels, including its Twitter feed *@Cinema_UK*, to offer comments and updates on a range of aspects of cinema and cinema-going as well as providing a commentary on its own activities and those of members. By the end of the year the Association's Twitter feed had gained almost 950 'followers', a significant number of those journalists or bloggers.

4.12 The Association also continued to publish a monthly 'cinema barometer', setting out the latest admissions and box office figures, audience breakdowns by region and other key data.

Promotion and marketing

05

UK Cinema Association

5.1 In April, the decision was taken to rebrand the Cinema Exhibitors' Association (CEA) as the UK Cinema Association. The aim of the rebrand – and an associated refresh of the organisation's logo and website (*www.cinemauk.org.uk*) – was to present a more contemporary face to the public, policy-makers and industry partners, more reflective of the innovative nature of the sector, the term 'cinema exhibitor' becoming increasingly obsolete in a digital world.

Cinema First

5.2 During the year, the work of Cinema First, the cross-industry body charged with finding ways to promote and encourage cinema-going, continued. Key strands are set out below.

EE Wednesdays

5.3 It had been announced in December 2014 that the long-running EE Wednesdays (formerly Orange Wednesdays) 2 for 1 cinema ticket promotion, then in its eleventh year, would end early in 2015.

5.4 At that time, the Association, through its involvement with Cinema First, had already begun an extensive tender exercise to find a suitable new partner with whom to develop a refreshed and expanded cinema promotion.

Meerkat Movies

5.5 In March, Cinema First announced that it had entered into an agreement with the price comparison website company comparethemarket.com to establish a new, more ambitious 2 for 1 cinema ticket promotion. A hugely successful company, comparethemarket.com are leaders in their sector and generally considered 'best in class' when it comes to creative marketing, most notably through the establishment of their 'meerkat' characters and associated range of free toys.

5.6 The new promotion – *Meerkat Movies* – expanded the previous 2 for 1 to two days, making the offer available to eligible comparethemarket.com customers on either a Tuesday or Wednesday each week. It was launched with a massive marketing campaign at the start of April. Central to this was a TV advertisement featuring the meerkat characters and Arnold Schwarzenegger, which debuted during the middle of *Coronation Street* on a Bank Holiday weekend to incredible press and social media reaction. This was supplemented by significant investment in 'in-cinema' marketing assets as well as radio, digital and online promotional activity.

5.7 *Meerkat Movies* quickly gained significant traction with the public, boosted by a regular refresh of the marketing across a range of media and digital platforms. This included regular 'idents' at either end of episodes of *Coronation Street* as well as a further TV advertisement with Arnold Schwarzenegger and two new creatives featuring Nicole Kidman.

5.8 By the end of the year, the promotion had picked up pace such that 1.6 million free tickets had already been acquired by cinema customers through the offer.

National advertising spots

5.9 For a number of years the Association has played a key role in supporting colleagues at the two screen advertising agencies – Pearl & Dean and Digital Cinema Media (DCM) – in negotiating and delivering various 'gold spot' deals, whereby key advertising brands benefited from exposure in the advertising slot immediately before the start of the main feature. During the course of 2015 however, the judgment of both agencies was that greater revenue could be achieved through separate negotiation on a film-by-film basis. As the year closed, the Association therefore withdrew from this area of activity.

UK Cinema Association Conference – marketing and retail

5.10 Building on the success of its inaugural event on cinema technology in 2014, the year saw the second UK Cinema Association conference. Titled *Engage: Reward: Grow – marketing the big screen experience,* the event, which focused on issues of marketing and retail, was held in November at the new Picturehouse Central cinema in central London.

5.11 The conference was a sell-out, attended by over 320 members and industry colleagues, and generously supported by a number of sponsors from across the sector. With central themes of exploring what more operators might do to market the big screen experience, how they might maximise revenue from their audience and the lessons to be learnt from within and outside the industry, attendees heard contributions from a range of speakers.

5.12 Immediate feedback from those attending the conference was hugely positive, with a general view that – even at a time when box office was exceptionally healthy and the sector buoyant – there was always more that could be done to encourage people to enjoy the big screen experience.

5.13 As the year closed, and in response to attendee feedback, the Association was considering the focus of a planned 2016 event.

Screen Awards

5.14 For the third year, the Association supported the long-running Screen Awards, the event providing an excellent way for the sector to recognise and celebrate excellence and achievement both in exhibition and across the wider cinema industry.

5.15 As well as sponsoring the Exhibition Achievement Award – deservedly given to Clare Binns, Director of Programming and Acquisitions at Picturehouse Cinemas and Picturehouse Entertainment – the Association also encouraged applications from members for the two cinema of the year categories, offered to an individual site run by a company with 24 or fewer screens and an individual site run by a company with 25 or more screens respectively.

5.16 In that the winners were judged not solely on box office and admissions but also on marketing, innovation and outreach, these were hotly-contested categories with the eventual winners – the Glasgow Film Theatre and the Odeon Dorchester respectively – richly deserving of their awards.

06

24 HR LIQUOR
STORE

Skills and training

6.1 The Association has an ongoing role in supporting its members in ensuring that staff are equipped with the right skills for the modern workplace. This has involved working at the strategic level with the sector skills agency Creative Skillset in ensuring that the framework of support and provision remains appropriate. In addition, Association Chief Executive Phil Clapp sits on that organisation's Film Skills Board as well as representing the film sector on the Creative Industries Council's Skills Board.

Apprenticeship Levy

6.2 In July, the Government announced plans to impose an 'Apprenticeship Levy' on all large employers from April 2017, the objective of this being to support the establishment of an additional three million apprenticeships by 2020.

6.3 A subsequent announcement in November confirmed that the Levy would apply to all employers with a total annual wage bill in excess of £3 million, and would be set at 0.5 per cent of that figure, generating an estimated total fund of £3 billion by 2020. The Levy would be available to all employers – regardless of whether they had contributed – to draw down to fund accredited apprenticeship places.

6.4 Mindful that – as now framed – the proposed Levy would impact on a number of the larger UK cinema operators (with an estimated annual 'take' of some £1 million) and that it presented an opportunity to fund new approaches in the sector, the Association consulted its members on the most beneficial way forward. It had already been active in this area, working with a number of key members in 2014 to develop and submit to Government for approval a 'cinema operative' apprenticeship standard under the trailblazer initiative.

6.5 While this had ultimately been rejected, it was felt to provide a solid foundation to revisit this issue. As the year closed, discussions with members continued on how to take this issue forward.

Cinema security

6.6 The need to ensure the comfort and security of audiences remains of paramount concern for all cinema operators. At the same time, there is an understanding that whatever measures are taken should be proportionate and not unnecessarily detract from the enjoyment of the big screen experience.

6.7 Following a number of public order and other incidents in 2012, the Association established a Security Working Group to discuss and share best practice in this area. The Working Group – consisting of operations colleagues from the major circuits as well as representatives from the police and security services – met three times during the year. Issues discussed included security training and awareness, steps to prevent and address cyber-fraud and protection against demonstrations and other attempts at disruption.

6.8 In the light of the ongoing security threat, the Association continued throughout 2015 to disseminate guidance and updates to members to ensure that all were adequately equipped to cope with a range of challenging scenarios.

Energy efficiency and environmental management

6.9 Energy efficiency and environmental management remain an important operational and ethical issue for cinema operators. During 2015, the Association's Energy and Sustainability Working Group continued its work with the consultancy Energise to support cinemas in becoming more energy-efficient and in reducing carbon emissions.

6.10 Work in this area that the Association has supported with its members to date suggests that while good progress has been made, there is a great deal more potential for individual cinema sites to reduce both their energy bills and carbon footprint.

6.11 The results of pilots undertaken by the Association with Energise in 2013 indicated that use of an appropriate 'toolkit' of approaches could – with relatively little additional investment or changes to working practices – make significant energy savings. Efforts to broaden the application of this toolkit in 2015 saw case studies undertaken at five smaller cinema sites. This work, undertaken with the support of the British Film Institute (BFI), was intended to generate further best practice to be shared with the wider Association membership.

6.12 Alongside this activity, the Association also worked with Energise to develop an online forum, providing a mechanism to share these case studies with its wider membership. The forum will allow members to share best practice and provide advice on how cinemas can through small changes reduce their energy consumption. The forum will go live in 2016.

07

TICKETS

International

7.1 Throughout 2015, the Association continued to draw strength from its partnership with organisations across a wide range of cinema territories as well as closer to home.

UNIC

7.2 The Association continued closely to involve itself with the work of the European trade grouping the Union Internationale des Cinémas (UNIC – International Union of Cinemas), now bringing together cinema trade associations and key operators from across 36 territories and of which the Association's Chief Executive Phil Clapp serves as President.

7.3 Meetings in Brussels, Cannes, Barcelona and Paris allowed the sharing of information, ideas and expertise and information with European colleagues on admissions, release windows, film theft, digital roll-out, cinema security, music rights and disability and access.

7.4 The year also saw UNIC – along with colleagues from across the wider European film industry – taking a strong position on European Commission proposals to establish a 'Digital Single Market' for film, a development which would at the very least challenge the system of multi-territory licensing of film rights across Europe which had stood the industry in good stead for a number of years. This proposal – driven more by ideology than an understanding of the realities of the commercial market was the subject of a range of meetings with both the European Parliament and the European Commission.

7.5 The year also saw the CineEurope event, the official convention of UNIC and now in its fourth year in Barcelona, continue to go from strength to strength. The 2015 event brought together over 3,200 professionals from across the European cinema industry to discuss issues of common concern and learn more about emerging technologies and business challenges. The Association was pleased to be able to negotiate an additional discount for smaller operators members, many of whom were as a result able to attend for the first time.

NATO

7.6 The Association's relationship with the National Association of Theatre Owners (NATO), representing cinema exhibitors in North America and beyond, continued to be a source of strength in 2015. Dialogue between the two organisations covered a range of issues, including public health, music rights, minimum wage levels, film theft, disability and access and cinema security.

Executive Board

7.7 The Executive Board, expanded in 2013 to represent a broader diversity of business models and approaches, met four times in 2015. At these meetings it discussed a range of strategic issues including the *Meerkat Movies* promotion, the relationship with the British Film Institute, music rights payments, disability and access, the Apprenticeship Levy and cinema security.

Regional branches

7.8 The Association continued to draw strength from its support not just from the larger operators, but also from a significant number of smaller operators located across the breadth of the UK. During the year, the Association was delighted to welcome eight new members: Imperial College Union; the Korda Theatre, Shepperton Studios; Midnight Movies Moonlight Drive-in; Dorking Halls; Regal, Tenbury; Strand, Belfast; Forum, Lings; and Westway, Frome.

7.9 Smaller operator members of the Association have historically been organised into regions. These now cover Scotland, the West of England, the Midlands and North of England and London and Southern England respectively. Over the course of the year, meetings were held in London (Canary Wharf and Piccadilly Circus respectively), Derby, Worksop, Edinburgh, Galashiels, Newquay and Dorchester. As the year closed, efforts were continued to (re) establish a branch for Welsh members. The Association is grateful in particular for the support of the elected Chairs of each of its regional branches.

Other partners

7.10 The Association enjoyed the support and engagement of a wide range of industry and other partner organisations throughout the year. Principal amongst these were colleagues in film distribution, with whom it discussed a wide range of strategic and operational issues, including marketing, film classification and the availability of accessible formats.

7.11 Many of the other key partner organisations without whose support the Association 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 Kinematograph Sound and Television Society, the British Screen Advisory Council, the British Video Association (now the British Association for Screen Entertainment), Cinema for All (formerly the British Federation of Film Societies) and Moving Picture Distribution. Particular thanks are again due to colleagues at IHS (formerly Screen Digest) and Rentrak (now ComScore) for their support across the year in providing key statistics and data.

7.12 Towards the end of the year the Association Board also met with colleagues from its partner trade body Directors UK. This was the first time there had been any structured dialogue between cinema operators and those representing key creatives working in the sector. Given the range of areas of shared interest, and the potential to learn much from each other, it is hoped to continue this engagement going forward.

7.13 The Association is grateful to all those who supported its work during 2015.

08

Profit and loss account for the year ended 31 December 2015

	2015 £	2014 £
Turnover	**448,271**	419,154
Administrative expenses	**(434,939)**	(456,648)
Operating profit/(loss)	**13,332**	(37,494)
Other interest receivable and similar income	**2,101**	2,101
Profit/(loss) on ordinary activities before taxation	**15,433**	(35,393)
Tax on profit/(loss) on ordinary activities	**(420)**	—
Retained profit/(loss) on year	**15,013**	(35,393)

Balance sheet as at 31 December 2015

	2015 £		2014 £	
Fixed assets				
Tangible assets		**10,004**		10,146
Current assets				
Debtors	**64,553**		191,625	
Cash at bank and in hand	**1,886,851**		609,735	
	1,951,404		801,360	
Creditors: amount falling due within one year	**(1,643,678)**		(508,789)	
Net current assets		**307,726**		292,571
Net assets		**317,730**		302,717
Reserves		**302,717**		338,110
Profit and loss account		**15,013**		(35,393)
Members funds		**317,730**		302,717

Excerpts from the UK Cinema Association Ltd (formerly Cinema Exhibitors' Association Ltd) Accounts 2015.

Past Presidents

E M Barker	1912-13
R Tennyson-Jupp, Dr	1913-14
W Fowler-Pettie	1914-15
A E Newbold, MP	1915-20
R R Goodwin, CBE, MCC	1920-21
C G MacDonald, JP	1921-22
E Trouson, Ald, JP	1922-23
A J Gale, Maj, OBE, MCC, JP	1923-24
J H Dovener, Counc	1924-25
Thos Ormiston, CBE	1925-26
W N Blake	1926-27
E Hewitson, Counc	1927-28
H Victor Davies	1928-29
F H Cooper	1929-30
W Stephenson	1930-31
R V Crow	1931-32
R E Richards, Ald	1932-33
J Welsh, Baillie	1933-34
J Pollard, Counc, JP	1934-35
R Dooner	1935-36
T H Fligelstone, Col, MC	1936-37
C P Metcalfe	1937-38
M A Nyman, BSc	1938-39
E J Hinge, CBE	1939-40
H P E Mears, Ald, OBE, JP	1940-41
S K Lewis	1941-42
W J Speakman	1942-43
H Simpson, Counc	1943-44
Sir W S Clift	1944-45
G H Scarborough	1945-46
Fred A Prior, FSAA	1946-47
B T Davis, FSAA	1947-48
Dennis C Walls	1948-49
Sir Alexander B King, CBE, DL, LD, JP	1949-50
A B Watts, FSAA	1950-51
H P E Mears, Ald, OBE, JP	1951-52
W J Speakman	1952-53
J W Davies, OBE	1953-54
C H Whincup	1954-55
R H Godfrey, JP	1955-56
B T Davis, FSAA	1956-57
George Singleton, CBE	1957-58
E J Hinge, CBE	1958-59
J D Richards	1959-60
Alfred Davis	1960-61
S K Lewis	1961-62
Miles M Jervis	1962-63
G L Barber, Ald, JP	1963-64
Peter King, MA	1964-65
J F Wood	1965-66
Wyndham Lewis, OBE, JP	1966-67
H S Roelich	1967-68
J K Stafford Poole	1968-69
Wyndham Lewis, OBE, JP	1969-70
Kenneth Rive	1970-72
Victor Chapman	1972-73
Miles P Jervis	1973-74
R J Dowdeswell	1974-76
C W A Painter	1976-77
S Shurman	1977-79
D M Cameron	1979-80
R J Dowdeswell	1980-82
G W Rhodes	1982-84
D F Chamberlain	1984-85
E J Lee, MBE	1985-90
M J Vickers	1990-92
I N Riches	1992-93
R C Warbey	1993-94
S Fishman, CBE	1994-99

CEA Executive Board Chairman

Barry Jenkins, OBE	1999-2005

CEA Ltd Executive Board Chairman

Barry Jenkins, OBE	2005-12

UK Cinema Association Ltd
Executive Board Members – April 2015

Phil Clapp, Chief Executive
Mike Vickers, Honorary Treasurer

Larger Operator Board Members / Nominated Substitutes

Cineworld Cinemas – Matt Eyre / Shaun Jones

Curzon Cinemas – Andrew Bailey / Mel Alcock

Empire Cinemas – Justin Ribbons / Paul Baxter / Craig Jones

Everyman Cinemas – Crispin Lilly

Moviehouse Cinemas – Michael McAdam / Hugh Brown

Natl Amusements (UK) – Duncan Short / Mark Barlow

Odeon Cinemas – Duncan Reynolds / Andy Edge

Reel Cinemas – K C Suri / Naveen Suri

Scott Cinemas – Peter Hoare

Vue Cinemas – Kevin Styles / Dominic Rowell

Smaller Operator Board Members/Nominated Substitutes

Pavilion Cinema Galashiels – Andrew Poole / Neil Poole

Savoy Cinemas – James Collington / **Electric Palace Picture House –** Graeme Cotton / **Kavanagh Cinema** – Robert Johnson

Mike Vickers / Stuart Hall

Picturedrome Cinemas – Adam Cunard / **WTW Cinemas** – Mark Williams

UK Cinema Association – Head Office

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