

# THE FUTURE OF CINEMA

## Digital Report

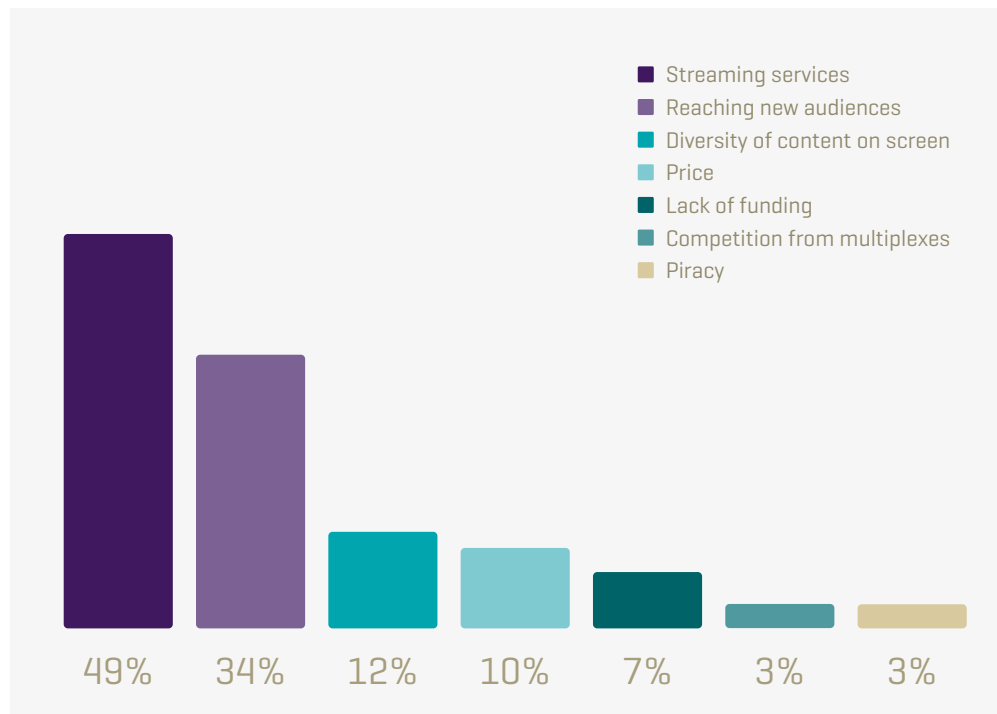
Our Annual Report in 2018 was focussed on The Future of Cinema. Here we conducted our widest ever survey of film professionals, collecting responses from over 250 individuals to gauge what their outlook is now and how they want to see the sector change for cinema to survive another 120 years. During our investigation and research seven key themes emerged suggesting ways forward. We've collated a selection of these responses in the following report, which explore these themes in more detail.

- 1 Greater diversity and a change in who gets to participate
- 2 Keeping the cinema experience special
- 3 Attracting younger audiences
- 4 A new approach to pricing
- 5 A greater commitment to independent programming
- 6 Put community at its heart
- 7 Refocusing on what cinema does best

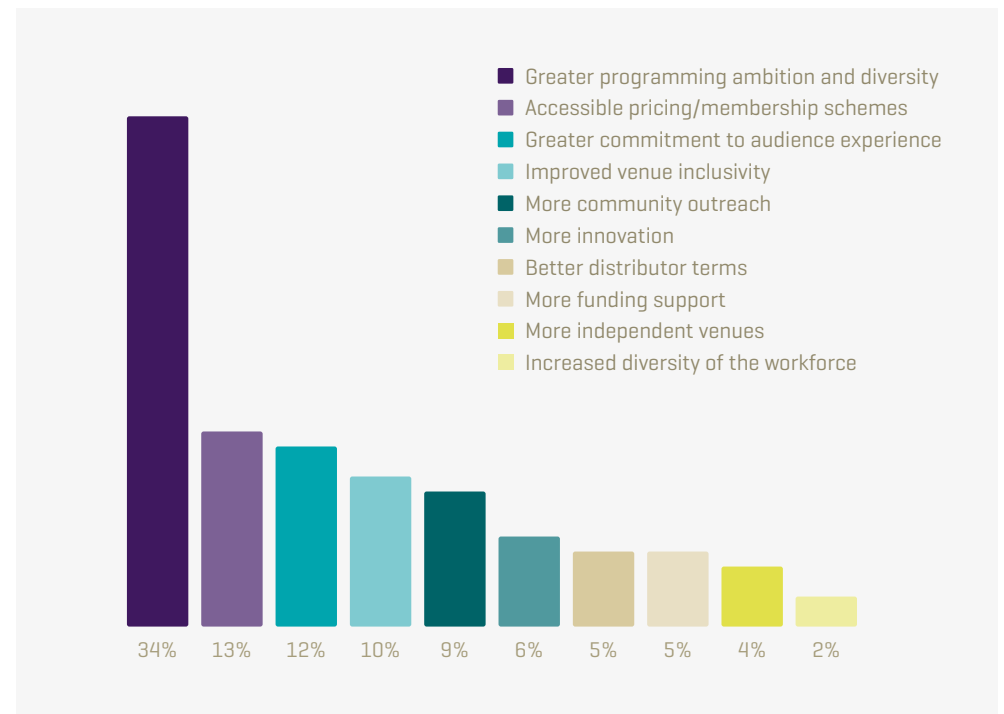
## What Will the Future of Cinema Be?

Cinema has gone through many periods of rising and falling fortunes. From the nickelodeon on, even in times of economic stability, there has always been a narrative that cinema is under imminent cultural threat. So far these ‘extinction level events’ (including television, VHS and more recently, online streaming) have only proved a spur for exhibition to renew itself and find new focus. But how will we face the challenges of the future?

The biggest challenges to cinema identified by survey respondents were:



The changes respondents most wanted to see over the next fifteen years:





1

## Greater diversity and a change in who gets to participate

The last ten years has seen a much closer scrutiny of how cinemas control whose stories get shown on screen. Many respondents feel that the only way to ensure cinema will thrive in the future is to broaden who gets the opportunity to take part.

## Responses



### MIA BAYS

FILM PRODUCER & DIRECTOR-AT-LARGE OF  
BIRDS' EYE VIEW

*They should feel like welcoming, inclusive spaces that celebrate film without hierarchy and privilege; kindle a deep lifelong kinship with the big screen experience without fetishising it. Their screens should contain films from a broader range of creatives than we currently see who represent the diverse world we live in and truly reflect the world back at itself in all its myriad experiences and parallels. To achieve this, we need to think about access to cinema for all, as guests and makers.*

### MEGAN MITCHELL

FREELANCE EXHIBITOR

*Cinemas are not in danger because of streaming sites or people watching films on their phones, they're in danger because the industry systematically excludes people in a number of ways, not least through costs, attitudes and language. The future of cinema is dependent on a cultural shift in attitudes, and move to a more open, diverse, inclusive and young industry and audience.*

### REBECCA DEL TUFO

PROGRAMMING MANAGER, SAFFRON SCREEN

*The power – and joy – of cinema is the sharing and hearing of different voices. Cinema needs to be representative of its audience and of all the voices there are to be heard. The start is for representation of women on screen and behind the scenes with all stories being told for all ages. This isn't diversity - women are half the world, half the audience. We want to see all stories. This starts from children's films and needs to be embedded through all types of cinema. Represent all audiences.*

### DIANA SANCHEZ

GLOBAL ENGAGEMENT MANAGER,  
RED BEE MEDIA

*I think the one thing that could improve is access via subtitles. If I could truly change one thing about the future of cinemas from an access point of view, it'd be a societal change. If watching content with captions could become the default throughout society (with all the added benefits in terms of literacy, second language learning, comprehension, etc.) and not something that is viewed as merely an aid for disabled people that would be amazing. If more screenings were captioned, especially at peak times, more people would watch those screenings and it would become normalised.*

2

## Keeping the cinema experience special

With more and more options for where to see films, many feel that cinema needs to focus on its fundamental power: an unparalleled collective space where you can be enveloped in the big screen.

3

## Attracting younger audiences

One of our respondents' biggest concerns is the decline in youth audiences. Although many feel that younger people's interest will return in later years, others suggest there is urgent work to be done to ensure that young audiences develop an appetite for cinema while they're young.

## Responses



### STEPHEN FOLLOWS FILM DATA RESEARCHER & CONSULTANT

*So what do the audiences of the future want from cinemas? They want an experience. Something they can't get at home. The cinema is no longer the sole venue for watching a movie. It's not even the sole venue for watching it on a big screen with good sound. But what it can be a destination. The style and attitude of the location, building, branding, staff, drinks, snacks, seats and screens all combine to create a place where movies aren't just projected, they're experienced.*

### SARAH BOILING INDEPENDENT CONSULTANT

*It's an obvious no brainer that if we want young people to choose the cinema instead of the sofa to watch their films we need to make it worth their while – and making it good value for money in terms of the price of tickets and refreshments is a key part of this. Some London cinemas are outrageously expensive – and I think people who work in the industry can forget what it's like when you actually have to pay for your own ticket.*

### CATHARINE DES FORGES DIRECTOR, ICO

*Throughout my entire career there have been warnings that cinema is dying or dead – that audiences can view content on any number of technological devices in their own homes or at their leisure and that the relevance of cinema to contemporary audiences is negligible. Despite the rise of viewing services and platforms, cinema continues to thrive and that's because there is something extraordinary magical and transformative about watching a film in the cinema, having a collective experience, in the dark, with people you don't know. There is nothing like it and for many of us, it continues to be a source of delight, of comfort and of solace throughout our lives.*



4

## A new approach to pricing

While box office revenue is trending upward, admissions are in decline. Many respondents worry that cinema is moving from a truly affordable art form – wherein audiences are more empowered to take risks with their viewing – to a financially exclusive one.

5

## A greater commitment to independent programming

In times of austerity, it's tempting to follow strictly commercial ends. But our survey respondents feel that we shouldn't dilute our expectations of what audiences want to watch, and that programming is the unique independent cinema selling point.

## Responses

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### MOIRA MCVEAN YOUNG AUDIENCES COORDINATOR, FILM LONDON

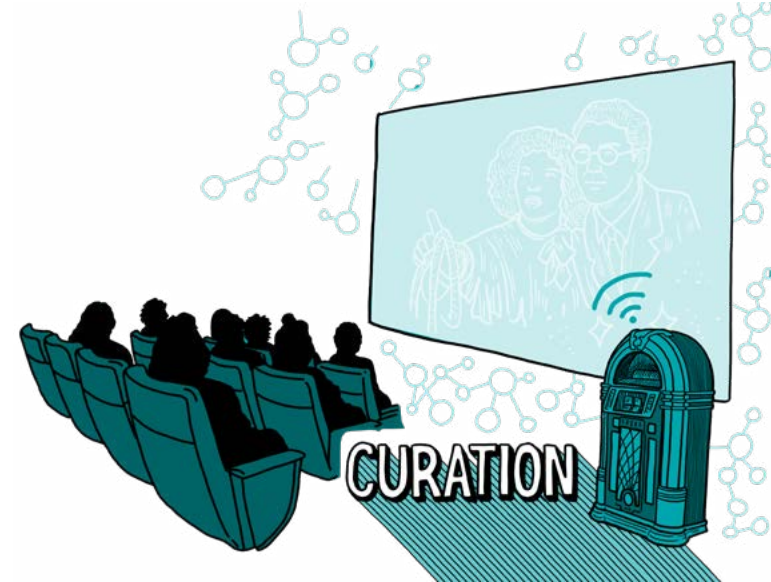
*Young people today are time poor, spoilt for choice and more financially challenged than ever before which tends to make them more risk averse. Keeping prices low encourages more diverse film watching choices but with the competition for their time, they expect more for less. Added value is what attracts this age group to independent venues as it stands out against the multiplex offer – the space to connect with like-minded individuals, talent Q&As and immersive experiences that turn film watching into an event, all help to justify the ticket price.*

### ROSIE GREATOREX PROGRAMMER, THE LEXI CINEMA

*The future of cinema will see our online and cinema viewing converge, so that a trip offline to the cinema encourages us to find other great films online, to develop our personal film taste and interests through wide ranging online viewing. This in turn then encourages audiences to seek out cinema trips further beyond the mainstream.*

### PHILIP ILSON ARTISTIC DIRECTOR, LONDON SHORT FILM FESTIVAL

*Can we bring back unique independent romantic spaces? London still has independent cinemas; I'm thinking the Rio and Genesis specifically, though these are first-run. The National Film Theatre continues as the BFI Southbank, and I have a lot of love for it. Close Up continues to impress with its eclectic programming, and Lexi, Institute of Light and Castle supplement one-offs with first-run. I love the dedication at these places.*





6

## Put community at its heart

Cinema has always been about people and audiences, but many people feel that community should be more central to the cinema experience; with cinemas directly responding to local community needs and ensuring their staff are well cared for.

7

## Refocusing on what cinema does best

Everything changes, but everything stays the same. The fundamentals of the attraction of cinema aren't going away, said many respondents, but we must ensure they're at the heart of what we're doing and complement the expanded range of options open to modern viewers.

## Responses

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### BEN LUXFORD HEAD OF UK AUDIENCES, BFI

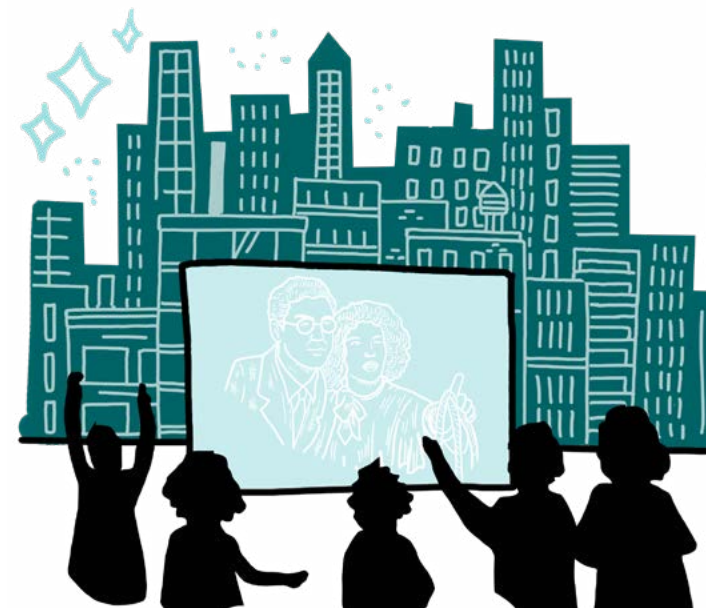
*The future of cinemas should look much more community driven. We're already seeing passionate community-minded entrepreneurs look for ways to rejuvenate their high streets, re-purpose buildings and inspire local residents to come together. Regardless of programme, the key to bringing in audiences will be to make them feel included and part of the very fabric of the venue and its purpose. I really believe this can operate at all scales of cinema (whether multiplex or small independent) in an increasingly globalised market. Also, robot ushers?*

### TARA JUDAH CINEMA PRODUCER, WATERSHED

*We already know that attracting audiences to cinemas is HARD, and requires both human and financial resources, but there are things that a cinema does and offers that, quite simply, no other space can. The auditorium is a time machine that allows us to touch the future, through a capsuled journey into our rich, complex past. It's also a complete mystery and that's where the magic is and always will be.*

### REEL GOOD FILM CLUB

*The future of cinema will consider its audience and all workers as collaborators. Before it can be achieved service workers – cleaners, freelancers and front of house staff, will be paid adequately for their work and their point of views heard. We want the future of cinema to be a place where the needs and wants of apparently 'minority', those who are a majority but under served, filmmakers, filmgoers and film programmers are put first and facilitated. We also hope cinema and other types of moving image will be affordable and more accessible to all, particularly young people.*





## Predictions for the future

What does the future of cinema look like and how could new technologies and societal trends shape how people interact with the big screen.

## Responses



### **PATRICK VON SYCHOWSKI** EDITOR, CELLULOID JUNKIE

*Cinema doesn't have one but many futures. Increasingly it will be personalised, customised and operated for the benefit of individuals, couples, families and groups, rather than masses. We will also see the spread of the 'private cinema' concept (aka on-demand cinema) from China, where small screens seating up to a dozen people can have a choice of thousands of titles from a film jukebox.*

### **JASON WOOD** CREATIVE DIRECTOR, HOME MANCHESTER

*We live in ever changing times in which representation and curatorship is becoming an increasingly integral part of how we reflect on screen the different fabrics of our global society and we need to continue to work to change who gets to decide what audiences see. The rise of programming collectives with clear mission statements in terms of diversity (class, race, sex, gender) is flourishing, and needs to be allowed to flourish further and find permanent places in our physical and home cinema spaces.*

### **SEAN WALSH** REGIONAL COORDINATOR, SCALARAMA

*Cinemas must be for everyone, since soon everyone will have a cinema. Before too long we'll be able to summon 16K screens to hover in front of our own blinkered eyes. But, actually, I think people are basically interested in each other's bodies. And everyone gets tired of their own face in the mirror, so people will always want to come together.*

### **DAVID SIN** HEAD OF CINEMAS, ICO

*There are already a number of different cinemas that to me, look pretty close to what most cinemas will be like in say 10 years time. I'm sure the idea of what a cinema is will continue to be expanded, and it will present itself in many different variations for different audiences around the essential elements of big screen, big sound and a social experience. For independent cinemas, the key to success will still be found in the Programming – in building trust with a wider range of audiences and creating a distinctive identity for the cinema through the programme at a time when everyone has access to a vast array of films.*

### **IAN MANTGANI** THE BADLANDS COLLECTIVE

*What I would like to see and eventually predict is an uptick in small, bijou kino houses – kept with care, idiosyncratically curated, soothing to hang out in; and, hopefully alongside that, an uptick in truly palatial, awe-inspiring film-going spaces, showing films from a range of technology including photochemical film. Home technology is great and getting better, so to make people want to go out and watch movies somewhere else you're going to have to comfort us or wow us, and give us good value for money either way.*



**COMFORTABLE SPACES**

CINEMA DOESN'T HAVE ONE BUT **MANY** FUTURES

**INSPIRING SPACES**

*Personalisation*

**THE FUTURE OF CINEMA**

RACE SEX GENDER

CLASS

REPRESENTATION

BRINGING PEOPLE TOGETHER

**INNOVATIVE RANGE OF TECHNOLOGY**

**CURATION**

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## How the ICO is looking ahead



Over the past fifteen years, the ICO has worked to address a wide range of issues across the sector. We have helped set the agenda for what independent cinemas can be; raising ambitions for their cultural and community offer both locally and nationally and enabling them to develop skills to meet these needs.

When the ICO began in 2003, there were very few women in leadership roles in exhibition; a lack of diversity in the workforce, particularly in full-time programming positions; hardly any opportunities for exhibitors based outside London to see pre-release films prior to programming them; no recognised exhibitor training courses; and fewer opportunities for audiences across the UK to see a true diversity of content and the broadest possible range of world cinema. We are incredibly proud of the breadth and variety of our activities, that we have instigated meaningful change in all these areas and have helped professionalise the sector and transform individual careers as well as the wider industry picture.

Looking ahead to the next fifteen years, we will work to address the issues and concerns raised in this survey. Despite our (and other) interventions, the statistics for the gender split and ethnic diversity in the workforce are still far from representative and we must lobby for policy provisions and work energetically to achieve true parity. As recognised within our survey (as well as recently by the BFI), we must also work towards greater socioeconomic representation to help cinemas ensure they are financially accessible to everyone no matter what their background, and that the stories shown on screen do not speak only to middle and upper class lives. We will work to inculcate a greater awareness of true community and social responsibility within cinemas; to involve younger audiences to ensure sector sustainability; and to lead in programming openness and innovation.

Through our policy work and public programmes, we will continue to advocate for the sector nationally and create a vision of truly independent cinema that is for everyone.

Read our full 2017-2018 Annual Report [here](#).