Understanding the impact of event cinema: an evidence review

For Arts Council England and British Film Institute

FINAL REPORT

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Understanding the impact of event cinema, an evidence review

Prepared by TBR's Creative & Cultural Team on behalf of Arts Council England and British Film Institute

FINAL REPORT

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Executive Summary

Introduction

Digital cinema has opened up opportunities for alternative forms of content to be shown in cinemas, including live streaming or relay of recorded performances of arts events ('encores'). There has been a rapid growth in the exhibition of this content in recent years, with the format now commonly referred to as 'event cinema'. In this context Arts Council England and the British Film Institute jointly commissioned this research to improve understanding of this emerging sub-sector and consider impact on the broader arts and cultural sectors. The research was exploratory, aiming to identify and where possible obtain relevant data that exists to describe event cinema, undertake brief consultation with key stakeholders to complement the data and to produce a narrative report to set the scene and help direct any subsequent studies.

Methodology

The availability of data was a challenge. The data obtained provided more insight into the scope and nature of event cinema than the impact(s). Much of the narrative on impacts is drawn from the consultations with key stakeholders. Given the small scope of the consultation it is important to recognise that this insight serves to inform discussion, rather than present firm evidence. It is acknowledged that there are likely to be viewpoints not represented from our sample of consultees, for example small-scale performance venues.

Key findings

Organisations involved

The sector is largely dominated by big players such as National Theatre and the English National Opera. However, there is also evidence of small-scale organisations being able to enter this market such as Cornwall-based Miracle Theatre.

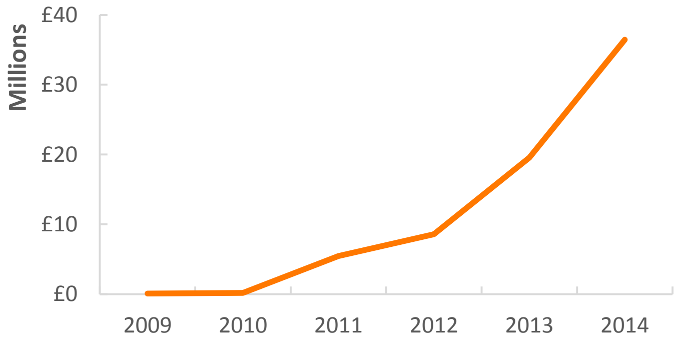
Event cinema is an attractive business prospect for content producers, allowing them to make their content more accessible to new audiences who otherwise may not be able to experience productions due to the costs or their geographic proximity to events. Financial returns are not always expected, as was the case with the subsidised arts sector consulted during this study; however, there is evidence of financial returns being made.

For cinemas, event cinema provides an opportunity to fill otherwise empty seats at off-peak times; although, anecdotal evidence suggests that in practice event cinema can compete with traditional film for key weekend transmission slots. It can also strengthen a cinema's brand as it seeks to offer more variety, and can assist with cash flow as one-off events are often booked in advance, unlike bookings for mainstream films.

Event cinema in the UK

The UK is a global leader in event cinema. It has 35 active distributors of content and has formed the only trade body for the industry in the Event Cinema Association. In 2014 event cinema was worth over £35 million in the UK and Ireland and accounted for over 3% of total box office sales.

Figure 1: Event cinema box office sales, UK & Ireland



Source: 2009 to 2013 figures from Rentrak; 2014 figure from IHS Technology Cinema Intelligence Service.

Although small in comparison to the wider film industry, individual event cinema successes can reach a magnitude comparable with traditional film releases. This was demonstrated by *Billy Elliot the Musical – Live* which topped the box office in September 2014. While impressive, this can also make it difficult to understand wider trends in relation to the sector. For example, seasonal peaks in performance can usually be attributed to individual titles rather than revealing a concentration of event cinema scheduling.

Of the cultural events screened via event cinema, opera and theatre are at the forefront. Opera leads the way in the UK in relation to the number of events screened. However, it is theatre that has secured its place as the dominant genre in terms of revenue, accounting for 45% of the UK & Ireland market in 2014.

Audiences

Audiences of event cinema tend to be more heavily engaged in the arts than those who haven't seen any live screenings. In terms of audience demographics, individuals who have viewed live screenings are more likely to live in a city than those who haven't. They are also more likely to live in London and the surrounding areas than elsewhere in the country.

Research into audience experiences of and motivations to attend event cinema indicates that while it does not fully replicate the experience of attending a live performance for audiences, this is balanced with the benefits of easier accessibility of productions. For some, event cinema is considered a new art form in itself: an alternative way to experience performances that complements the original art form rather than competes with it. There is no evidence to suggest that film or theatre audiences are being displaced by event cinema; however, this could be due to a lack of data rather than there being clear evidence of no displacement effect. There is also no evidence that it is growing new audiences for live theatre performances, but there is an indication that it may inspire further attendance at event cinema screenings.

Challenges

The key challenges for the continued success of event cinema often reflect the infancy of the genre. There is a perceived lack of public awareness of event cinema that cannot be remedied by marketing campaigns due to the limited budgets currently available. Word-of-mouth, which can provide momentum for film releases, cannot be relied upon for one-off events. Concerns have also been expressed that there is a general lack of consistency in the quality of productions.

The UK film industry faces the challenge of increased competition in obtaining key theatrical scheduling slots which can impact heavily on the financial returns made. Though in part, at least, event cinema appears complementary to traditional film this challenge is likely to increase as it continues to grow.

Future

The prevailing view is that event cinema will continue to grow its share of the box office and content will continue to diversify, which will increase competition in the market. The quality of event cinema productions should continue to improve through the development and sharing of best practices.

This research has highlighted many knowledge gaps that exist in relation to this sector. The following recommendations cover some of the key areas that would benefit from further exploration:

- Co-ordinating further data relating to the scope of event cinema to provide a richer view of the sector: specifically, scheduling and ticket data from cinema and live performance venues.
- Understanding audience displacement, with particular regard to local theatres.
- Assessing evidence, or otherwise, that audiences consider event cinema a new art form in itself.
- Assessing the extent of competition for peak-time slots between event cinema and traditional film, and the impact this has on the UK film industry.
- Engage with organisations involved in local and community cinema to assess the reach of event cinema in rural areas.
- Engaging with small-scale arts venues that are producing content for event cinema or trying to enter this market.

1. Introduction

1.1 Research context

National Theatre Live (NT Live), the National Theatre's programme of digital cinema broadcasts, launched in 2009 and was the first large scale live broadcast of theatre performances in the UK. The National Theatre's website currently reports total worldwide audiences for NT Live screenings of 3.5 million since its inception[1], the broadcasts are shown in 550 venues across the UK[2] which range from multiplex cinemas to small village halls in rural areas[3], and their productions are now making a financial return[4].

Increasingly arts and cultural organisations, such as the British Museum, the Royal Opera House and the National Theatre, are using cinemas to broadcast live performances, either as live streamings or encores, with the aim of ensuring more people experience and are inspired by the arts. Alongside this, other forms of live events – e.g. interviews with film directors, pop concerts – are being transmitted into cinemas. The term used in this report to describe such transmissions is 'event cinema'.

Event cinema offers audiences alternative opportunities to experience live performances, albeit in a different way. Benefits include opening up access to cultural events to a wider audience, additional revenue streams for cinemas and venues, and utilising underused cinema space. However, there are concerns that the development of event cinema may lead (or is leading) to unanticipated consequences, such as changes in audiences, monopolisation of the market by large players, perceptions of quality of the productions, and effects on other screened content such as film. As a result of such concerns, there are calls from some involved parties for discussion on how best to monitor and potentially regulate event cinema nationally[5].

From the arts perspective, there is currently limited knowledge and understanding of this emerging area and the implications and consequences for public policy. Little research has so far been conducted to ascertain the impact of screenings of live events[6]. For example, the ways in which screened arts events create additional opportunities for audiences to experience events they would not otherwise be able to access; how audiences for screened events compare to those for 'live' events; the effect on the arts ecology in terms of programming, touring and distribution; whether and how the screening of arts events creates a new income stream for arts organisations; and the impact on local audiences and provision where the work is screened.

For the film sector, the suggestion is that these events can provide significant income to cinemas and for some it can prompt them to change their business model. However, there is a need to understand this better and investigate the potential displacement consequences for film distribution and exhibition, for example, the impact on the ability of films (especially British and specialised) to obtain a theatrical release; the length of release and number of screenings; and the impact on revenues for cinemas. In addition, understanding any wider displacement or substitution effects on audience behaviour is important; whether the screening of event cinema is drawing new audiences to the cinema (who then return to see film), or whether the growing audience for alternative content is a substitute for watching film.

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[1] http://ntlive.nationaltheatre.org.uk/about-us last accessed on 16/06/15
[2] Ibid.
[3] http://artsdigitalrnd.org.uk/features/the-ongoing-benefit-of-rd-for-nt-live/ last accessed on 16/06/15
[4] Ibid.
[5] Arts Professional (1 May 2015) 'Sector split on need for national screening strategy.' http://www.artsprofessional.co.uk/news/sector-split-need-national-screening-strategy?utm_source=Weekly-News&utm_medium=email&utm_content=Sector-split-on-need-for-national-screening-strategy&utm_campaign=1st-May-2015
[6] Ibid.

1.2 Aims and objectives

Arts Council England (ACE) and the British Film Institute (BFI) recognise event cinema as a significant emerging element of the arts and cultural sector, about which there is currently little robust and empirical evidence. ACE and BFI thus identified a need to explore what data is currently available on event cinema, collect as much of this as possible, analyse it, and produce a narrative report to set the scene and help to direct any subsequent studies. The primary purpose of this research is to identify what data on event cinema exists, where the gaps are, and to analyse what it tells us about trends in the sector. Specifically, the aims and objectives were:

1. To deliver an improved understanding of the scope and nature of event cinema in England.

2. To consider the evidence for the impact, both positive and negative, of screenings of event cinema in cinemas, upon audiences, the cinemas themselves, distributors, production companies, and the arts/culture/film sectors more broadly.

3. To identify evidence gaps in relation to the sector, and consider how these may be addressed.

1.3 Definitions and terminology

This project is concerned with the digital broadcast of live performances of cultural events. This includes the simultaneous streaming of a performance or event happening live, or post-event repeats ('encores') of these streamings. It may also include events that are partly streamed live, such as a film with a Q&A session.

In this study, a 'cultural event' is considered to be any of the following: theatre, opera, film/documentary, ballet, exhibition, classical concert, popular music concert, comedy[7]. Sporting events are not included.

The term event cinema has been utilised throughout this report for consistency. However, this is not the only terminology in use, nor is it necessarily the most appropriate. Often still referred to as *alternative content* (as it still tends to be in the US), it was the launch of the Event Cinema Association in 2012 that set out to rebrand alternative content to event cinema[8]. For some, the formation of the Association has cemented this term going forward. For others, this is still up for debate.

There are positive connotations regarding the word 'event' as indicative of a special or one-off experience. On the other hand cinemas may regard *all* of their screenings as an event, and in this context the term may fail to differentiate their offering. Feedback at an IHS Europa Cinemas Conference in 2013 noted that upon asking the opinion of the 150 attendees present, only three people preferred event cinema to alternative content[9]. A further factor is that whilst the venue to which content is streamed is often a cinema, other venues do also screen content, such as theatres with screens. In this context the term event *cinema* may be regarded as being too explicitly associated with the mode of exhibition, rather than the content itself.

Whilst generic terms are used interchangeably within the industry to communicate this type of activity to audiences, brand names such as Odeon Plus and Empire extra are beginning to appear. Still in its infancy, it is not clear how widely understood the concept of event cinema is within the wider public and how recognisable the terms currently being used are. However, we do note that MTM's[10] research found

[7] As per Rentrak's classification www.rentrak.com; Rentrak provides transactional media measurement and analytical services to the entertainment and media industries. They provide a service for subscribers that allows access to near real-time reporting of box office data.
[8] http://www.eventcinemaassociation.org/assets/eca-annualreport2013.pdf last accessed on 16/06/2015
[9] https://technology.ihs.com/467652/europa-cinemas-conference-digital-cinema-workshop-summary last accessed on 16/06/15
[10] Exploring the market for live-to-digital arts, MTM 2015

that only 12% of respondents were unaware of the possibility of viewing arts in cinemas. Finally on the point of terminology, although there are benefits to classifying this sector under the umbrella term 'event cinema', the diversity of content (and therefore the associated means of production) suggest that in the future, it is likely that research should seek to understand the genres in their own right. For example, audience demographics, attendance, buying patterns, and engagement with other art forms will look very different between a live ballet screening and a live gaming experience.

1.4 Method

An exploratory approach was required in order to identify information that could improve understanding in this field. This consisted of a qualitative and quantitative review to:

1. Conduct a literature review and synthesis of existing research evidence.

2. Conduct qualitative interviews with key identified stakeholders. These were:

    - The Audience Agency
    - Rentrak
    - Royal Opera House
    - National Theatre
    - Event Cinema Association
    - Film Distributors' Association
    - Cinema Exhibitors Association
    - Picturehouse Entertainment
    - Showcase Cinemas

3. Identify, obtain and analyse relevant data from existing sources and research.

In line with the scope of this research, a limited set of consultations were undertaken, and as such some findings are presented as anecdotal. In addition, not all consultations that were sought were possible. This was predominantly driven by individual schedules, which meant a consultation time within the timeframes of the project could not be secured.

2. The evolution of event cinema

The first live broadcasts to cinemas in the UK, between 2002 and 2006, included concerts by Bon Jovi, David Bowie and Robbie Williams and *Amnesty International's Secret Policeman's Ball*. However, it was the Met Opera's 2006 series *Met Opera Live in HD,* which really paved the way for the expansion of event cinema within the arts. Diversification has continued to change the shape of event cinema since its inception. Although opera was considered a dominant event cinema art form, and still is in terms of the number of productions in the UK & Ireland, IHS analysis of the market in 2014 shows that theatre is now the leading genre, accounting for almost half of all event cinema revenue[11].

Consultees for this project noted that the National Theatre's NT Live programme was key to this growth, regarding it as pivotal for introducing a wider variety of content. This has potentially spurred a drive to produce content like *Monty Python Live (Mostly),* which introduced the idea that content could be for the whole family and not just reserved for high arts such as ballet and opera. Other productions which demonstrated the potential for event cinema to diversify were the *Dr Who 50th anniversary,* the broadcast of a television programme in cinemas, and the British Museum's *Pompeii* exhibition.

It is notable that individual successes continue to define the evolution of event cinema. For example, in 2014, *Billy Elliot the Musical – Live* became the first ever event cinema production to top the UK & Ireland box office[12], i.e. it outperformed every other film screened in cinemas over a seven day period. And *One Direction – Where We Are – The Concert Film* broke the record for the biggest ever event cinema audience across one weekend, making approximately $15million worldwide[13]. Whilst there have been a number of individual production successes, the market is dominated by a handful of key distributors[14] which is explored in more detail later in this report (see section 3.5).

2.1 Motivations for producing content

Consultations with key producers of event cinema working in the publicly funded arts and culture sector, suggest that their primary motivation is to increase the reach of the work to ensure that as many people as possible in the UK and abroad have the opportunity to experience performances. It is accepted that these motivations may vary from those of other types of organisations. The broadcasts open up content to new audiences who would perhaps not have the opportunity to attend a theatre or opera show because of cost, location, or due to shows selling out. As an example of this additional reach, the National Theatre sold 4.3 million tickets worldwide in 2013/14 and over a third of these (1.5 million) were for NT Live. NT Live has, therefore, enabled the National Theatre to grow the total audience for its productions by over 50%.

Building the profile and the reputation of cultural brands is also a key motivation and is particularly significant in relation to broadcasting internationally[15]. Event cinema allows organisations to have a constant presence in international markets, which in the past may have been limited to touring. The knock-on effect of this can impact on the theatre productions themselves. The National Theatre consider that transmitting live shows has helped to build their brand in the US, which means that their touring shows have since had a better reception. Within the UK, the National Theatre also attributes a strong sales day in the West End for *One Man, Two Guvnors* to a prior live screening of the performance. It would be useful to explore this hypothesis further by obtaining and analysing data on individual productions to explore any correlations between attendance figures for live performances and screened events.

[11] Hancock, D. (2015) 'Event cinema: a sector in full swing.' IHS Technology Cinema Intelligence Service.
[12] http://www.bbc.co.uk/news/entertainment-arts-29429557 last accessed on 16/06/15
[13] http://www.artsalliance.com/largest-global-event-cinema-release-ever/ last accessed on 16/06/15
[14] Based on Rentrak data provided by BFI
[1515] It shouldn't be overlooked that as the market is currently dominated by a few large cultural organisations, the ability to successfully engage internationally may be linked to existing awareness of their brand and ability to feature well-known talent.

Whilst another motivation for broadcasting content is to increase revenue, this is not currently regarded within the subsidised arts sector as the key driver[16]. Those consulted in this study stated that a financial return is never guaranteed, nor necessarily expected, with high outlays involved in producing the work and unknowns relating to the infancy of the business model. The cost and logistics involved in enabling live performances to be screened means that producers of this content need to be selective in what they choose to exhibit. The National Theatre estimates each broadcast cost to range from £250,000 - £300,000, though they are now in a position where most productions are returning a surplus on this[17].

Through the consultation process the Royal Opera House (ROH) and the National Theatre (NT) provided insight to how their productions are chosen to be live streamed. Royal Opera House stated that selections are made to represent the diversity and breadth of the ROH's two performing companies, with significant input from the companies' Artistic Directors. NT noted a similar process that results in a diverse offering of productions. NT indicated that considerations are given to the time of year, for example choosing more family-orientated shows at Christmas. They are also aware of other event screenings and try to avoid clashes. Ensuring a constant presence seems important, with regular productions throughout the year (in the case of NT around one per month, for example). Regular broadcasts mean that audiences can expect and look out for the performances. It is recognised that these views come from two large, well-known organisations and assessing event cinema business models for smaller organisations may indicate a different approach.

Logistically there must be enough time to create quality productions, which will involve additional rehearsals with cameras and microphones prior to the event. Additionally, not all theatres within one venue may be equipped to broadcast shows, which also impacts on choice.

The National Theatre also work with partners to enable their performances to be screened, such as Manchester International Festival's *Macbeth*. This type of partnership will enable other organisations an opportunity for exposure around the UK and beyond.

The programming of encore shows is largely driven by reaction to the demand at cinemas for the live show. A production with a strong performance at the box office may have 3 or 4 encores, a weaker one may have none. One view is that the encores should have a short shelf life after the live performance (a number of days) so that it retains the 'almost live' feeling. By contrast, *Frankenstein* which was first produced in 2011 has been re-released within the National Theatre's live repertoire every year since.

2.2 Motivations for screening content

Conversely to producers, the rationale for cinemas (and other venues with screens, e.g. theatres, multi-arts venues) increasingly programming such events is predominantly to maximise revenue. Reasons cited through consultations include that cinemas can charge higher prices than normal for event cinema. Benefits to cinemas and, more broadly, to local economies, include the utilisation of cinema space at off-peak times[18]; increasing the appeal of a towns' offering to local populations and retaining their leisure spend within the local area[19]. It has also been shown that in London, the emergence of event cinema has stimulated sales of tickets for live theatre performance[20].

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[16] However, event cinema is proving now that, for some cultural organisations, it can provide returns, or at least cover its own costs.

[17] http://artsdigitalrnd.org.uk/features/the-ongoing-benefit-of-rd-for-nt-live/ accessed on 18/05/2015, note that no further breakdown of this cost estimate is provided to assess how it is split across different functions (filming, distribution, marketing etc.).

[18] Sluis, S. (22 September 2009) 'Choosing alternatives: New programming options eye mainstream acceptance' *Film Journal International*

[19] Independent Cinema Office 'Beyond film screening.' http://www.independentcinemaoffice.org.uk/resources/how-to-start-a-local-cinema/strategic-choices/beyond-film accessed on 16/06/15

[20] Bakhshi, H. and Whitby, A. (2014). *Estimating the Impact of Live Simulcast on Theatre Attendance: An Application to London's National Theatre*. [pdf] London: NESTA. http://www.nesta.org.uk/sites/default/files/1404_estimating_the_impact_of_live_simulcast_on_theatre_attendance.pdf

Consultees note that event cinema can also allow cinemas to broaden audiences, with content that appeals to a different demographic to their core audience. In the examples provided, this was mostly in relation to an older and more affluent crowd, though it is acknowledged that this will not always be the case, with some events that specifically target younger demographics, for example *One Direction – The Concert Film.* Cinemas can further benefit from this by showing trailers for films prior to broadcasts that are targeting the same demographic, with the aim that they will return for a non-event cinema production. There was no available evidence to test this theory, though accessing anonymised, but linked, ticket data from cinemas may provide an opportunity to track repeat visits to explore this.

It has been difficult to maintain footfall at cinemas over recent years and event cinema may be seen as a way of supporting or reinventing the box office. A reported[21] [22] attraction of event cinema for cinemas is the utilisation of otherwise empty or under-used space at off-peak times[23]. However, our case study on Showcase Cinema's event cinema screening times (page 13) shows that in recent years, their screenings have moved away from early and mid-week slots, to later in the week. It would be useful to collect similar data from other cinema chains in order to consider whether this is a wider trend. If so, this would signify increasing competition between event cinema and film for prime-time weekend slots.

Event cinema is also considered to offer more vibrant options to some cinemas which can use it to strengthen their brand. For example, it was suggested during one consultation that Vue are formally called Vue Entertainment and not Vue Cinemas for this reason; with entertainment giving them the latitude to be seen as a destination for an exciting variety of content.

Crucially for cinemas, event cinema assists with cash flow as they have guaranteed sales for one-off events that are often booked in advance, unlike bookings for mainstream films.

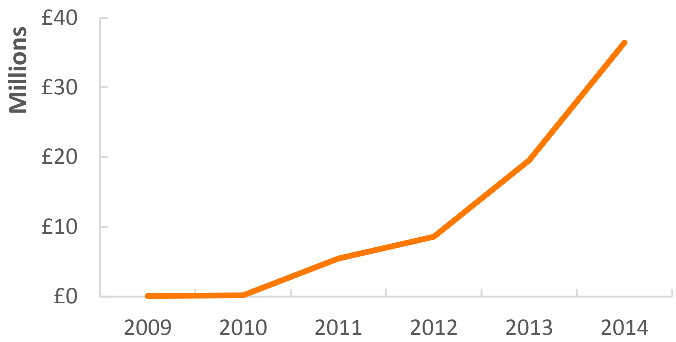
[21] Cookson, R. (14 June 2013) 'Alternative content at cinemas draws in the masses.' *Financial Times.*
[22] Sluis, S. (22 September 2009) 'Choosing alternatives: New programming options eye mainstream acceptance.' *Film Journal International.*
[23] This is not the only way that cinemas have been able to achieve this, innovative approaches to programming feature films such as senior and mother and baby screenings may also be utilised for the same purpose.

3. Event cinema in the UK

3.1 Box office value

Event cinema has seen a rapid rise in growth over the past 5 years and is now worth over £35 million in the UK & Ireland box office, as outlined in Figure 1.

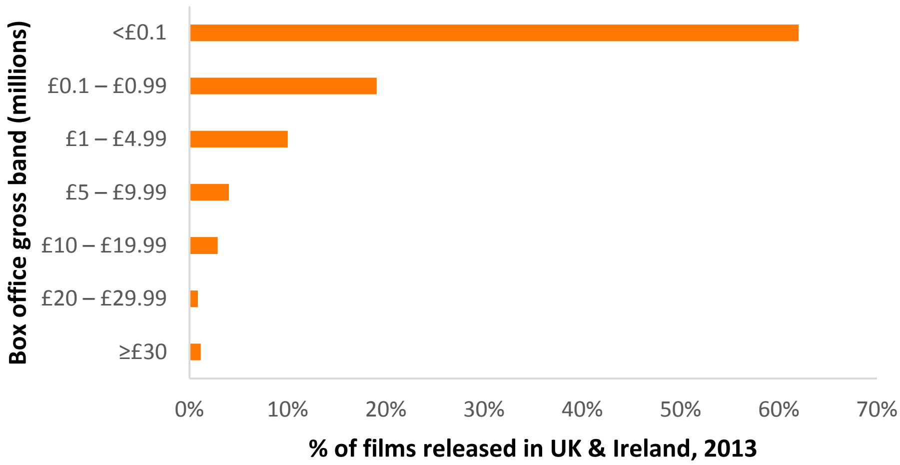
Figure 1: Event cinema box office sales, UK & Ireland



Source: 2009 to 2013 figures from Rentrak; 2014 figure from IHS Technology Cinema Intelligence Service.

Data from the past two years indicates that the average event cinema production in the UK generated over £230,000[24] in box office revenue. As the best available comparison, Figure 2 shows the distribution of all films released in the UK and Ireland in 2013 by box office gross bands. The majority of all releases (62%) fall into the band of less than £100,000.

Figure 2: 2013 UK and Ireland film releases by box office band



Source: BFI Statistical Yearbook 2014, based on 698 film releases.

As well as a high average value, some examples of higher earners at the UK and Ireland box office for event cinema include NT Live/Picturehouse's *Frankenstein* which achieved over £2.4million in 2011 and Universal's *Secret Cinema presents Back to the Future* which generated over £3.5million in 2013[25].

[24] Rentrak via BFI. Data from Jan 2013 to Jan 2015.
[25] Data provided by Rentrak, note that figures are not directly comparable as the event cinema average is based on the UK box office, the examples provided here relate to both the UK and Ireland box office.

Given the often restricted length of releases for event cinema, their relative performance at the box office appears impressive. To explore this further, analysis relating to event cinema productions by average widest point of release[26] (WPR) provides opportunity to assess the value against mainstream films with comparable reach. The average number of sites at WPR for event cinema between Jan 2013 and Jan 2015 is 87.9, with a mean box office value of £230,204[27]. The median box office sales for *all* films where number of sites at WPR is 50 – 99 is £45,000[28]. This indicates that event cinema screenings perform better in terms of sales figures than films with comparable reach. This is not wholly unexpected, and can likely be attributed to higher ticket prices and frequently being able to sell out screenings. However, it is an achievement that one-off shows are outperforming on-going film releases. In future it would be useful to access information relating to the number of screens, rather than just sites, to provide even more granularity to this analysis.

3.2 Ticket prices

NT Live set guide prices for screening of their productions, although prices are set by each screening venue and therefore vary. NT Live aim for ticket prices to be accessible for a wide audience: their ticket guide prices are influenced by the cost of a theatre ticket for the same production and their desire to not exceed the lowest priced tickets for a live production. The general accepted level of pricing for event cinema tickets is around twice the price of a standard cinema ticket[29]. Table 1 below provides a comparison of ticket prices for a standard 2D film and an event cinema screening at two chain and two independent cinemas, compared to the price of attending live performances from NT Live, Globe on Screen, or the English National Opera (ENO) Live. It is interesting to note the much wider gap between Standard 2D film and event cinema prices outside of London, which mean that in some cases the price of attending event cinema is actually three times the price of a standard 2D ticket. When compared to the potential maximum ticket cost for a live performance (particularly ENO), the attraction of event cinema is clear.

Table 1: Ticket prices for event cinema vs live performances

Venue	Standard 2D film	NT Live	Globe on Screen	ENO Live
Odeon (Central London)	£6-£12.50	£10 - £18	£15.50	£18
Odeon (outside London)	£6.30-£9.20	£10-£17.50	£10.50 - £13	£15.50-£17.50
Vue (Central London)	£14.79	£17.50	£15	£15
Vue (outside London)	£9.99	£15	£12.50	£15
Broadway Cinema, Letchworth	£5.00	£15	£15	N/A
Mac Birmingham	£7.50	£14	N/A	£20
Live performance	N/A	£15-£35	£5-£43[30]	£12-£125

Source: All ticket prices for a standard adult ticket, for a weekday evening screening. Information taken from the website of each cinema, on 19/06/15. Price bands shown relate to variances in different productions, film and cinemas on offer. Cinemas chosen to illustrate diversity in type, it is recognised that this is not fully representative of all cinemas.

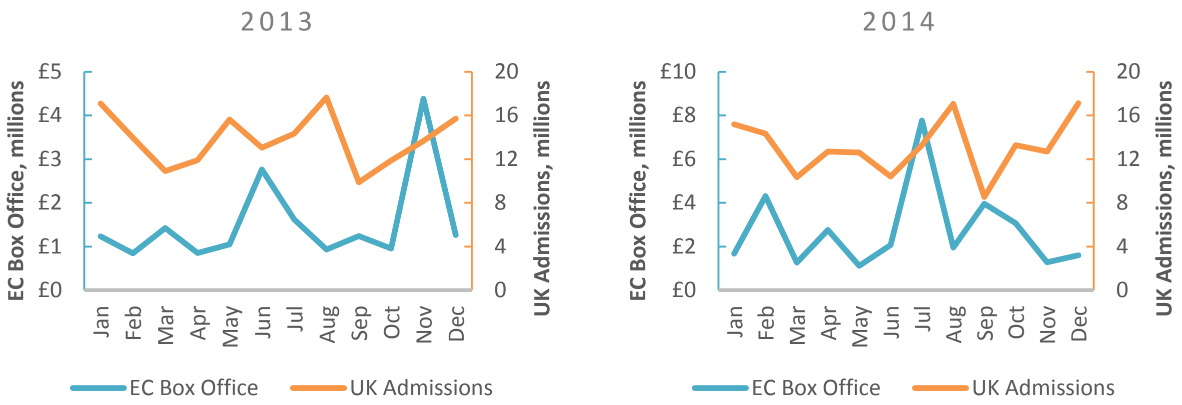
[26] Widest point of release refers to the largest number of sites a film was screened at concurrently during its release at cinemas.
[27] Rentrak via BFI. It is acknowledged that this analysis is indicative and not a like-for-like comparison. This is due to data availability for this research.
[28] Rentrak, BFI RSU analysis, from BFI Statistical Yearbook 2015
[29] Nesta 'NT Live: Digital broadcast of the theatre, learning from the pilot season.' http://www.artscouncil.org.uk/media/uploads/pdf/NT_Live_NESTA_case_study.pdf
[30] Tickets priced £5 are standing, tickets priced £17 - £27 have restricted view

3.3 Scheduling

Figure 3 (below) shows the performance of event cinema box office sales in the UK by month in 2013 and 2014. A comparison to UK admissions is provided as the best available comparator for performance across the whole film market.

The data suggest that event cinema is more volatile than the established film market; peaks in 2013 are not reflected in the same months in 2014. It is likely that, given the current scale of the event cinema market, individual productions are responsible for peaks in the data and it is perhaps too early to see trends forming. In 2014, September had the lowest monthly admissions for all films in the year and was down 14% on 2013, which was the month when an event cinema release topped the weekend box office charts for the first time ever, with Billy Elliot the Musical Live taking the top spot in the final weekend[31].

Figure 3: 2013 and 2014 monthly UK event cinema box office sales compared with total UK film admissions



Source: Event cinema box office data: Rentrak via BFI; UK Admissions: BFI Statistical Yearbooks 2015

Views from the consultation indicated that event cinema is typically regarded as complementary to the mainstream cinema programming and therefore planned to avoid clashes with weekend peak time film scheduling. Cinemas tend to operate at low capacity during the week, with anecdotal evidence from consultations quoted figures between 17 – 25% occupancy. This is corroborated by other sources placing occupancy at 20%[32]. It therefore makes sense to try and fill empty seats. One consultee noted that event cinema productions can sell out weekday matinee slots of encores that traditional film could not. In this example the demographic was considered to typically be in the 65+ age group and it was hypothesised that one of the reasons the audience are happy to attend the cinema at this time is because it is quieter.

Another consultee indicated Tuesday and Thursdays as popular days for scheduling events; the latter because it is close enough to the weekend that more people are likely to go. Wednesdays on the other hand have traditionally been avoided due to the Orange Wednesdays promotion, a widespread offer providing two tickets for the price of one. This long running promotion ended in 2015 and has since been replaced by Meerkat Movies which offers a similar deal available on Tuesdays as well as Wednesdays[33]. It may be that this will impact further on midweek event cinema scheduling.

Within this study, it was only possible to obtain scheduling data from one cinema chain. A case study of daily scheduling of event cinema by National Amusements/Showcase Cinemas is provided below.

[31] BFI Statistical Yearbook 2015 (The Box Office 2014).
[32] A Future For British Film: It begins with the audience…, Department for Culture, Media & Sport, January 2012
[33] http://www.bbc.co.uk/newsbeat/article/31961899/orange-wednesdays-replaced-by-meerkat-movies-in-cinema-deal accessed on 16/06/15

Interestingly, this does not follow the trend cited above (and reflected anecdotally) that cinemas tend to schedule event cinema on quiet mid-week days.

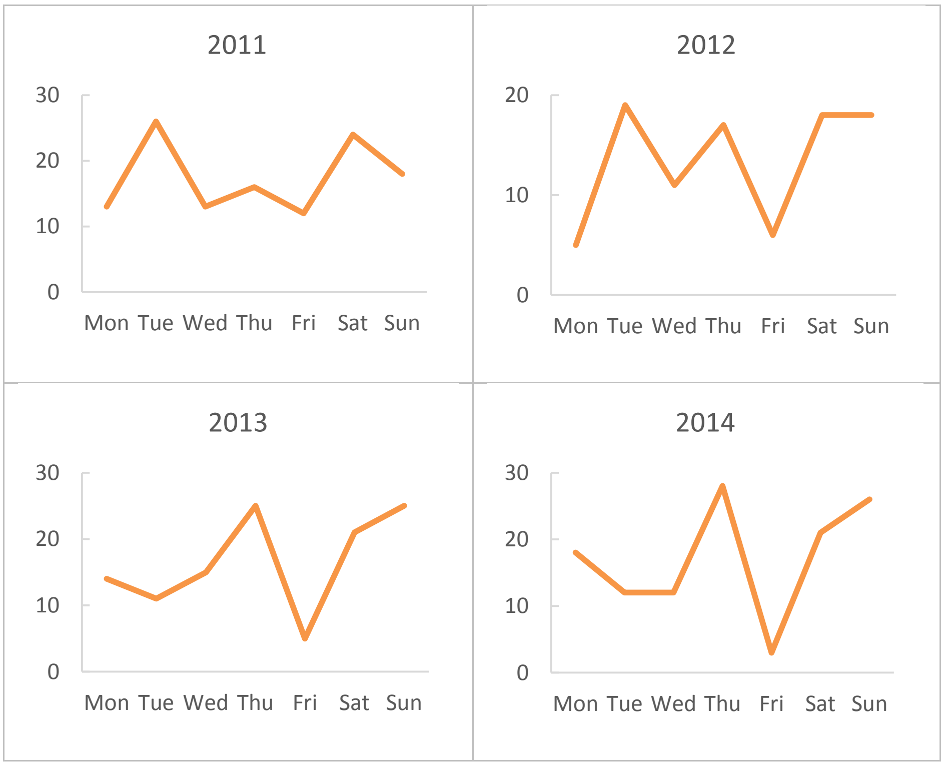
James Dobbin, Director of Event Cinema at National Amusements/Showcase Cinemas, explained that regardless of scheduling strategies, when it comes to live shows sometimes there is no choice but to screen them when they are happening, and this can impact on mainstream film scheduling. An example to illustrate this comes from the Met Opera, who tend to hold productions early on Saturday evenings. This can be problematic for films that rely on sales from their opening weekends which are reduced if they are missing out on slots for their first Saturday night. He adds that some other live productions can often be scheduled during weekday evenings, which was corroborated through consultation with Royal Opera House (ROH) who note that cinemas strongly encourage them to produce performances between Monday and Thursday which ROH are very comfortable with.

Case study 1: National Amusements/Showcase Cinemas scheduling by day of week

Data provided for the study by National Amusements/Showcase Cinemas provides an insight into how scheduling of event cinema across the week has evolved at this chain over recent years. The fourth largest exhibitor in terms of number of cinema screens, National Amusements has 20 sites across the UK which consist of 264 screens[34].

The most recent 2 years follow a comparable pattern with peaks on Thursdays, Sundays, and Saturdays and a very prominent lack of shows on Fridays. However, 2011 and 2012 follow a more random pattern with more peaks throughout the week. This is perhaps indicative of periods of early testing in order to determine what works best for the cinema.

Figure 4: Number of event cinema screenings at Showcase Cinemas by day of week, 2011 – 2014



[34] BFI Statistical Yearbook 2014

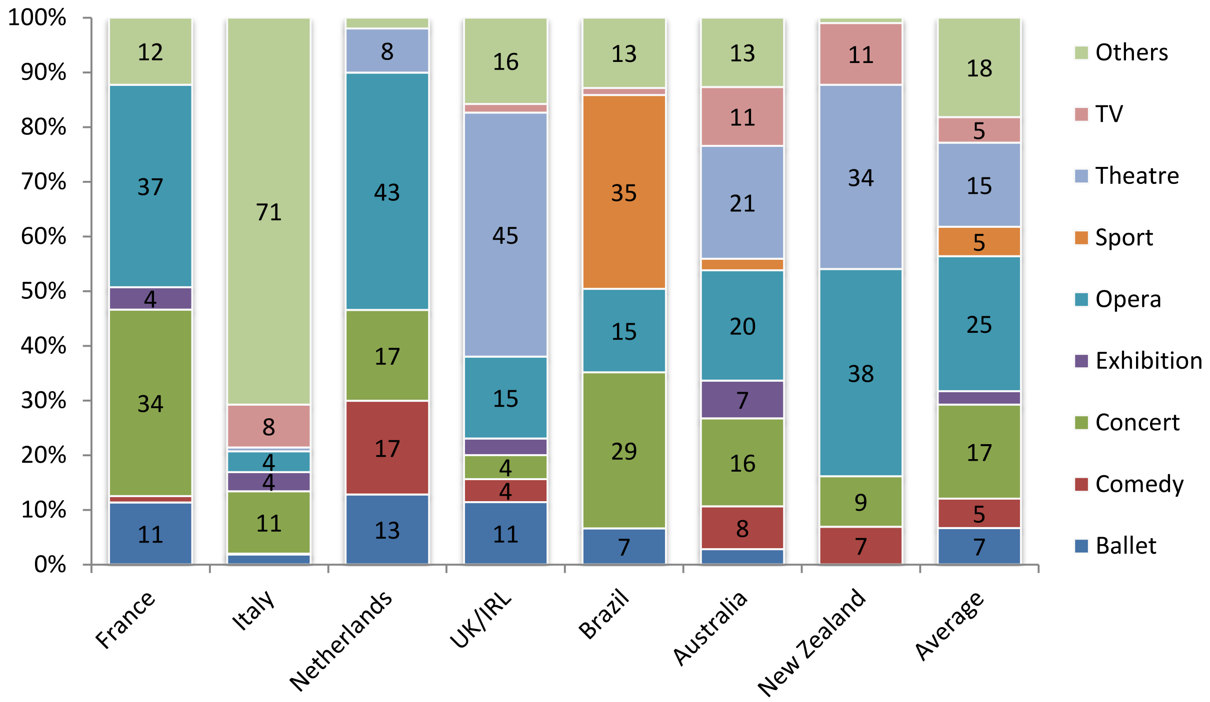
Source: Showcase Cinemas (NB: data for 2014 is partial to 13th November)

It may be that this trend is specific to multiplexes targeting an audience who would prefer to come to the cinema on days closer to the weekend. More data would need to be gathered from other chains and cinema groups in order to consider this in detail. For example, patterns may be different in arthouse cinemas.

3.4 Genres

Global analysis of event cinema across a selection of countries in 2014[35] found that theatre was the most popular genre across all markets, taking 26.1% of cross-territory revenues. Theatre is the heavily dominant genre in the UK & Ireland accounting for 45% of the market, while other key genres, opera and concerts, fall below the average. There is a lot of variation between countries, though this can often be attributed to the success of individual events. In Italy, for example, the most successful event in 2014 was a children's production of *Peppa Pig* which grossed €2.7 million (included within the others category here). In Brazil, the figures are skewed as they hosted the *FIFA World Cup* in this year which resulted in the sporting genre accounting for 35% of the market.

Figure 5: Event cinema revenue market share by genre, 2014



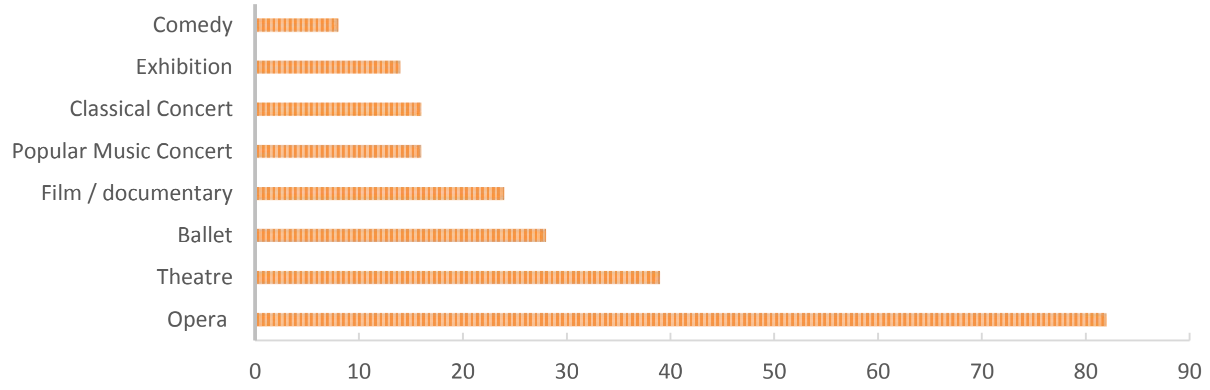
Source: IHS Technology Cinema Intelligence Service 2015

The following figures compare the quantity and cumulative value of event cinema in the UK between January 2013 and January 2015, a period which has shown significant growth in the market (as shown in Figure 1, page 10). Figure 6 breaks down the number of event cinema productions in the UK by genre. Reflecting the data above, opera is clearly the dominant genre, with more than twice the number of productions as theatre. However, looking at the average box office sales per event during the same time

[35] IHS conducted research across a sample of countries in 2012: UK, Russia, Germany/Austria, Ireland, Sweden and Netherlands. Hancock, D. (2013) 'Event cinema in European cinemas.' *IHS Screen Digest Cinema Intelligence Service*

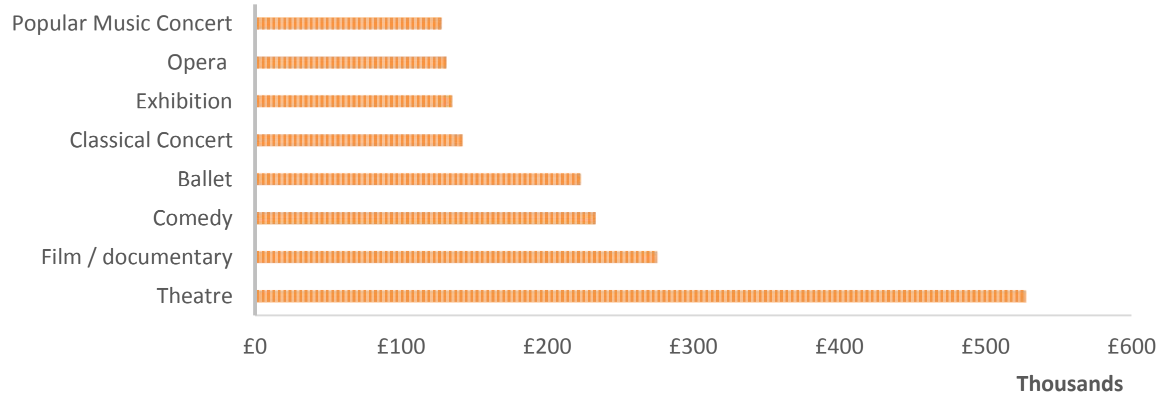
period in Figure 7, the reverse is shown with theatre on average generating around double that of opera. It is therefore important not to consider quantity of productions in isolation when considering the scope of the sector.

Figure 6: Number of event cinema titles by genre (Jan 2013 – Jan 2015)



Source: Rentrak via BFI

Figure 7: Average event cinema box office sales per film per event by genre (Jan 2013 - Jan 2015)

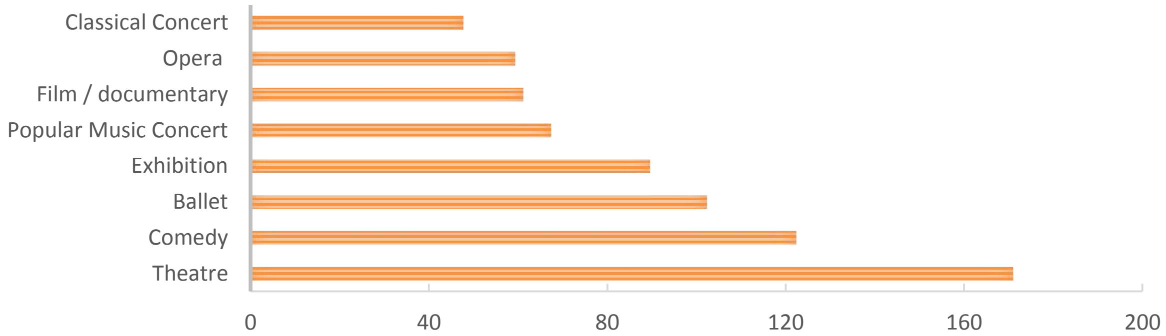


Source: Rentrak via BFI

To provide more context to this we can assess the same event cinema categories against their average widest point of release, in Figure 8 (below). Theatre has the highest WPR on average, which explains how the genre can return higher box office sales with fewer productions. Opera, on the other hand, is one of the least widely distributed. One consultee viewpoint considered arthouse cinemas as a more likely destination for high-arts shows such as operas, whereas multiplexes seek more family-friendly content, which may explain the wider reach (and therefore higher revenues) that theatre achieves. It would be useful to obtain data relating to event cinema screenings by location and cinema type to explore this in detail.

Also highlighted within this data is comedy as a potentially underexploited genre within event cinema. We can see that whilst there is very little of it produced as event cinema, it is the third most valuable in terms of the average box office sales per event. Again this can be attributed to the good reach it achieves at WPR.

Figure 8: Average no of sites at WPR by Genre for EC (Jan 2013 - Jan 2015)



Source: Rentrak via BFI

For this study, National Amusements/Showcase Cinemas provided data on screenings by genre between 2011 and 2014. The following case study shows the top 5 genres of event cinema in this period, where we see the proportion of screenings covered by the top 5 increases from constituting 77% of all the screenings in 2011 to 86% in 2014. Interestingly although theatre tops 2014 and came second in 2013, it did not feature at all in the top 5 genres for 2011 and 2012. This again may show the evolution of the cinema group testing what works best for them and their audiences. It also potentially indicates a diversification in available content, which perhaps represent genres particularly suited to multiplexes.

Case study 2: National Amusements/Showcase Cinemas event cinema by genre

Table 2: National Amusements/Showcase Cinemas most screened event cinema genres, 2011 – 2014

2011	
Genre	**No. screenings**
Opera	45
Film	17
Concert (Rock & Pop)	14
Dance	9
Doc	9
These constituted 77% of all screenings in 2011	

2012	
Genre	**No. screenings**
Opera	33
Concert (Rock & Pop)	20
Concert (Classical)	9
Ballet	9
Doc	5
These constituted 81% of all screenings in 2012	

2013	
Genre	**No. screenings**
Opera	38
Theatre	20
Ballet	17
Concert (Rock & Pop)	12
Concert (Classical)	6
These constituted 80% of all screenings in 2013	

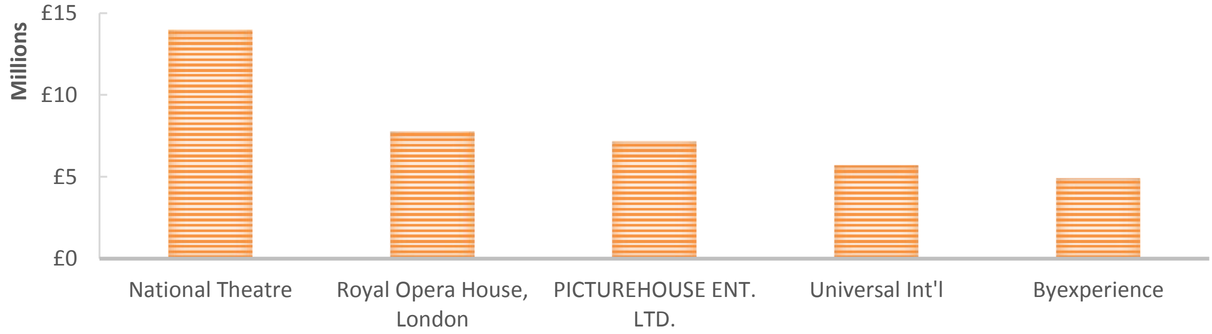
2014	
Genre	**No. screenings**
Theatre	33
Opera	26
Film	23
Ballet	15
Concert (Rock & Pop)	6
These constituted 86% of all screenings in 2014	

Source: Showcase Cinemas (NB: data for 2014 is partial to 13th November)

3.5 Distributors

The top 5 distributors of event cinema in terms of box office value are shown in Figure 9. With theatre and opera leading the way in terms of number and value of productions, it is perhaps no surprise that NT and ROH feature at the top of this list. These 5 distributors are responsible for 76% of all event cinema box office sales between 2013 and 2015.

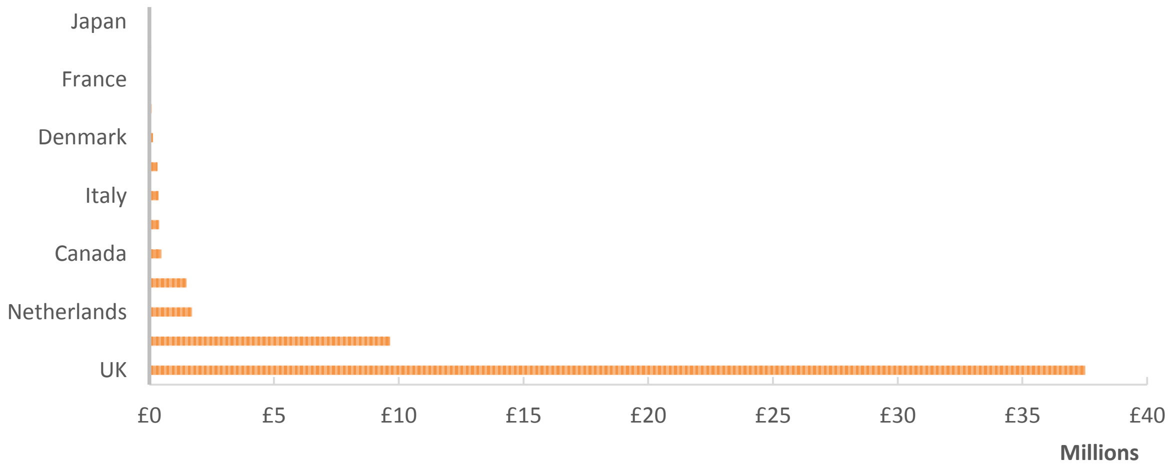
Figure 9: Top 5 distributors by box office sales (76% of total, Jan 2013 - Jan 2015)



Source: Rentrak via BFI

In line with anecdotal evidence from consultations, the UK and US are leading the field in regard to creating event cinema content that is shown in the UK. Figure 10 illustrates that productions originating in the UK accounted for around 70% of total UK event cinema sales revenue between January 2013 and January 2015 alone, with the US contributing a further 20%.

Figure 10: UK event cinema box office sales by primary country of origin (Jan 2013 - Jan 2015)



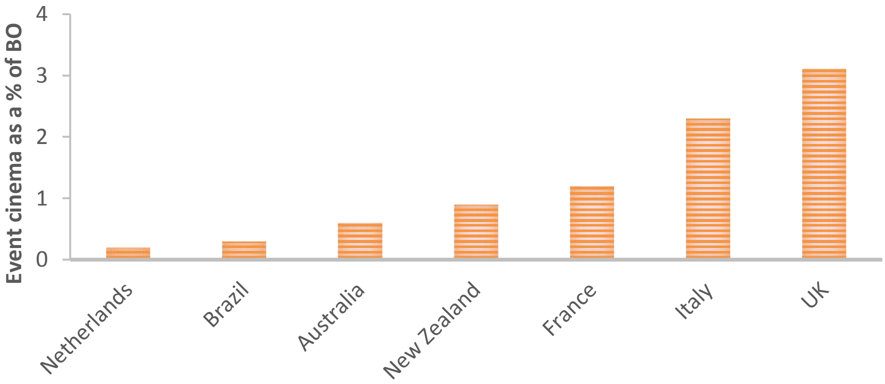
Source: Rentrak via BFI

3.6 The UK's global position

There is already an established global market for event cinema which is present in over 50 countries around the world, with companies in areas such as Latin America actively developing this sector[36]. The global gross revenue generated by event cinema was estimated to be $277.2m in 2014, which is almost a third higher than 2013, and by 2019 is expected to surpass $1bn[37]. This growth is facilitated by 94% of the world's cinemas having now being digitised[38].

IHS research based on 2014 data[39] shows that among a select group of countries the UK leads the way in this sector, with event cinema accounting for a significantly higher proportion of box office sales, at 3.1%, than anywhere else (Figure 11). This is also reflected in the volume of distributors that the UK has at 35, compared to other countries such as France and New Zealand that have only 4 each (Figure 12).

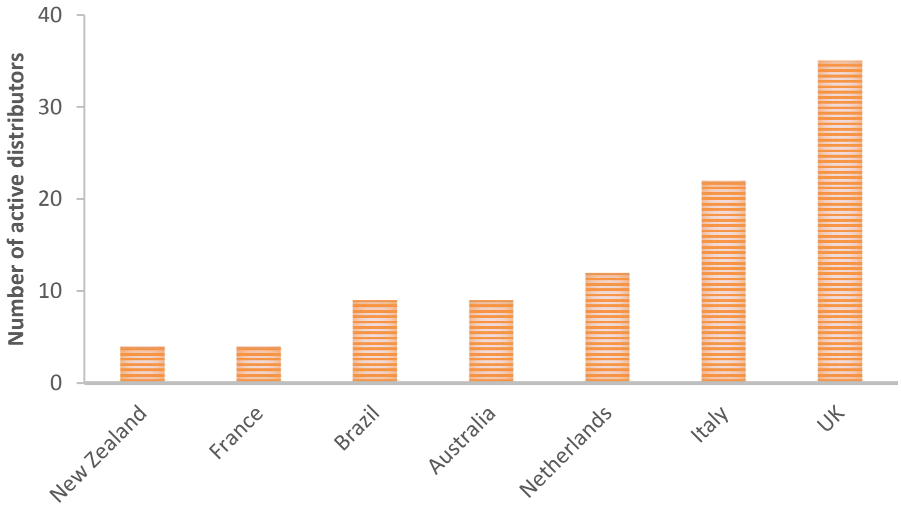
Figure 11: Event cinema as a proportion of box office by country, 2014



Source: IHS Technology Cinema Intelligence Service 2015

[36] Hancock, D. (2013) 'Event cinema in European cinemas.' IHS Screen Digest Cinema Intelligence Service
[37] Hancock, D. (2015) 'Event cinema: a sector in full swing.' IHS Technology Cinema Intelligence Service.
[38] Ibid.
[39] Ibid. It is acknowledged that some major territories are missing from this research, including USA, Canada, Germany, Spain, Scandinavia, Russia, Mexico, Argentina and Japan.

Figure 12: Event cinema active distributors by country, 2014



Source: IHS Technology Cinema Intelligence Service 2015

Consultee input indicated that countries considered to do well in this field often have dedicated event cinema teams and good marketing. One example provided during the consultation process is Italy who have a dedicated event cinema distributor in Nexo Digital and whose success is believed to be in part down to the country having a small number of media networks. This means that tapping into only one or two newspapers or radio stations can ensure good coverage across the country. In contrast, in the US it is far harder to gain media penetration across the country. This often means that no local marketing is done and may explain why the US event cinema market has failed to grow at the rate the UK market has.

There was a widely-held view from those consulted during this process that the UK is one of the leaders, if not the pre-eminent leader, of event cinema globally. It is also the only country to have formed a trade body for the industry (the Event Cinema Association). It was accepted that the US was dominant a number of years ago, particularly through the work of the Met Opera. However, consultees felt that the UK has risen to prominence due to the following:

- There are more global distributors of event cinema within the UK than other countries around the world, which may result in the UK being able to produce higher volumes of content.
- Our geographic position is beneficial; with time differences meaning the UK can distribute to and receive shows from the US as easily as it can Russia, for example.[40]
- The strong cultural environment in the UK with a diverse set of internationally recognised organisations, for example the National Theatre, Royal Opera House, V&A, and the British Museum. These organisations are recognised for their brand, quality and, where relevant, their performers.
- The UK's strong cinema network, and having the technology in place to show event cinema. Not all countries are fully digitised and therefore do not have the framework in place to stream the work.

[40] The same rationale could be applied to most of mainland Europe so this is likely to assist in the UK becoming a major player in the field, but is perhaps not pivotal.

- The UK is considered the most advanced market for event cinema in Europe, due to having digitised a number of screens early through the UK Film Council's Digital Screen Network[41]. This is explored in more detail in Section 3.6.

[41] Hancock, D. (2013) 'Event cinema in European cinemas.' *IHS Screen Digest Cinema Intelligence Service*

4. The event cinema audience

4.1 Experience and motivations

A study by the English Touring Opera in 2014[42] aimed to understand the appeal and audience experience of live opera cinema broadcasts. Data was gathered through dissemination of a questionnaire and holding focus groups with cinema audiences of live opera. Qualitative thematic analysis revealed overlap in what is valued by audience members when viewing opera in cinema or theatre. The key themes identified are: liveness, participation, appreciation of excellence, specialness, and involvement. Notably, 'liveness' and 'specialness' are attributed more so, but not exclusively, to the theatre experience. In this context, 'liveness' relates to physically being in the same space as the event, whereas for cinemas it is associated more with having a shared experience with other audience members, either within the cinema or the theatre being viewed. They also found mixed reactions to cinema viewing whereby some felt close-up views of performers provided on screen enhanced the experience, whereas others found the film medium to be a distraction.

The ETO study also assesses the key attitudes towards cinema opera in context to its relationship with theatre. These include the view cinema screenings will never fully replicate the experience of live opera in a theatre. It is regarded as a new art form in itself, however, and considered a good alternative for those that cannot access the live performances as it provides a 'fairly good approximation' of being there. Additionally, it is considered beneficial in attracting newcomers to the opera genre by making it more accessible.

In March/April 2015, Arts Professional undertook an online survey[43] of arts professionals regarding their experiences of event cinema. Results were mixed, revealing that 24% of respondents felt that screenings were 'always' or 'often' as exciting as live performances, whereas 31% answered that they were 'never' or 'seldom' as exciting.

Our consultations indicated that live streams are perceived to be more popular than encores (repeats of the live shows) among audiences. One view was that this may be because UK audiences are accustomed to seeing, and therefore have an expectation to see, live events[44]. Results from the Arts Professional survey conversely found that the majority of respondents felt that there was little difference in the experience of watching an encore or live stream[45].

While data is emerging concerning the experience of those who have attended event cinema, there is less evidence relating to the broader awareness of event cinema. A survey in May 2015 by MTM, commissioned by ACE, provides some insight as it investigates the market for live-to-digital arts, which is defined as 'any live arts performance captured using digital video technology for internal use or external broadcast, online, on TV or in the cinema'. It found that 19% of the UK population have watched live-to-digital arts content in the cinema (with a further 7% who had watched it online but not in a cinema)[46]. The survey also found that only 12% of respondents were unaware of the possibility of viewing arts in cinemas.

Producers and broadcasters of event cinema note that extending the reach as a key benefit of their productions; providing audiences with the opportunity to attend cultural events that they may otherwise be unable to access, due for example to their geographic location, or prohibitive cost of tickets[47]. Cost is

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[42] Wise, Karen (2014). English Touring Opera – Opera in Cinemas Report. [pdf] London: Creative Works. Available at: http://www.creativeworkslondon.org.uk/wp-content/uploads/2014/05/ETO-Working-paper-May-2014.pdf
[43] Pulse Survey, Arts Professional 2015. http://www.artsprofessional.co.uk/pulse
[44] The consultee felt that this was likely to be driven by the UK's central time-zone, which enables events to be shown from a wide-range of countries at reasonably accessible times across the day.
[45] Ibid.
[46] Exploring the market for live-to-digital arts, MTM 2015
[47] The Guardian (6 May 2015) 'To beam or not to beam? How live broadcasts are changing theatre.' http://www.theguardian.com/stage/theatreblog/2015/may/06/effects-of-live-satellite-broadcasts-national-theatre-rsc

a key factor to consider, with Ticketmaster analytics recently showing that this is the main barrier to attending live theatre[48]. The National Theatre's programme of event cinema was shown to have drawn in lower income audiences than those who attend live theatre performances[49], achieving the aim of widening the reach to beyond traditional audiences of high culture.

Respondents to the Arts Professional survey expected to pay less for screenings than for live shows, with 69% indicating they would pay less than half the price. One reason given for this position was that audiences do not get the full live experience at a screening. Arts Professional also found that as well as cheaper tickets, audiences are likely to make even further savings by being able to travel to more convenient locations and not having to pay for overnight stays and additional food expenses. This is also reflected in other literature[50] and our consultations for this project. Some comments were specifically in relation to bringing cultural experiences to people living outside London they otherwise could not have, or that they would have to spend a lot of time and money travelling for. However, others also noted that motivations to attend event cinema within the capital are consistent with elsewhere, i.e. based on cost and distance. Buying patterns would be open to further investigation if data could be obtained at a level of granularity that allows for analysis by date of purchase and location.

It should be noted that much of the research and literature to date has focused on the broadcast of performing arts (e.g. theatre, ballet, opera). An example provided during the consultation process related to the encore broadcast of a pop concert; fans who went to see Robbie Williams live *also* attended a screening of the same show 6 weeks later. Reportedly, their motivations included being as close to him as possible, that they enjoyed the comfort of the seats and the ease of getting home, which echo those noted above. Unfortunately, it is unknown whether these fans would have attended the broadcast *instead* of the live show. It would be useful to understand more about the motivations to attend event cinema across genres to consider whether there are variations depending on format.

[48] Ticketmaster (2013) 'State of play: Theatre UK' http://blog.ticketmaster.co.uk/wp-content/uploads/pdf/LiveAnalytics_State_of_play_TheatreUK_Low_Res.pdf
[49] Nesta 'NT Live: Digital broadcast of the theatre, learning from the pilot season.' http://www.artscouncil.org.uk/media/uploads/pdf/NT_Live_NESTA_case_study.pdf
[50] E.g. Cookson, R. (14 June 2013) 'Alternative content at cinemas draws in the masses.' *Financial Times.*

4.2 Location and demographics

The following information has been obtained from the Audience Agency's Population Panel Survey. Of their 5,800 respondents around 930 (16%) said that they had seen a live screening[51], which was defined as:

"Stream or relay of a live performance happening elsewhere (e.g. gig, opera, theatre or even an exhibition)"

As shown in Figure 13, those who have viewed live screenings are far more likely to live in a city than those who haven't. Those living in rural areas or small towns and cities are less likely to have seen a live screening.

Figure 13: Location of residence for viewers of live screenings

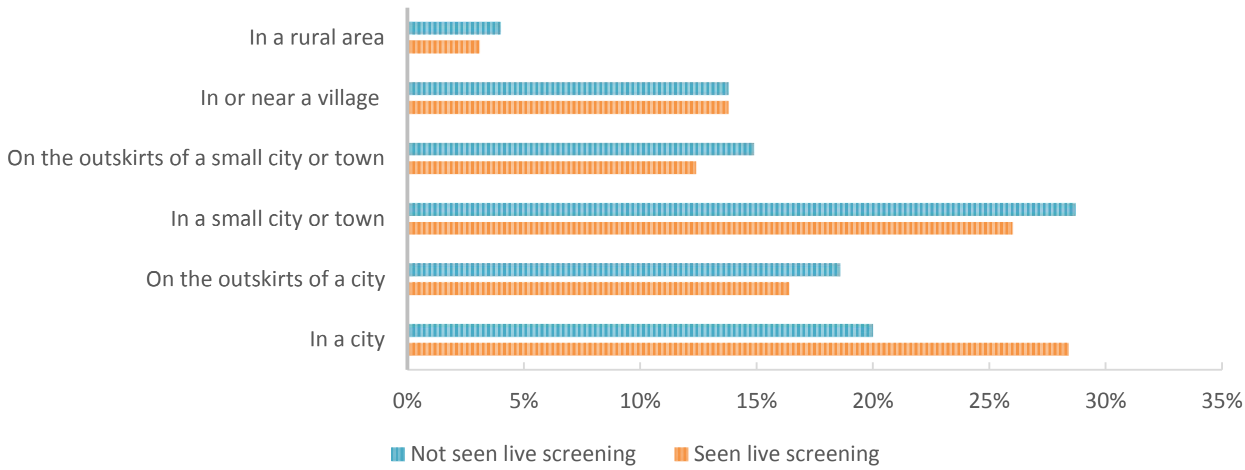
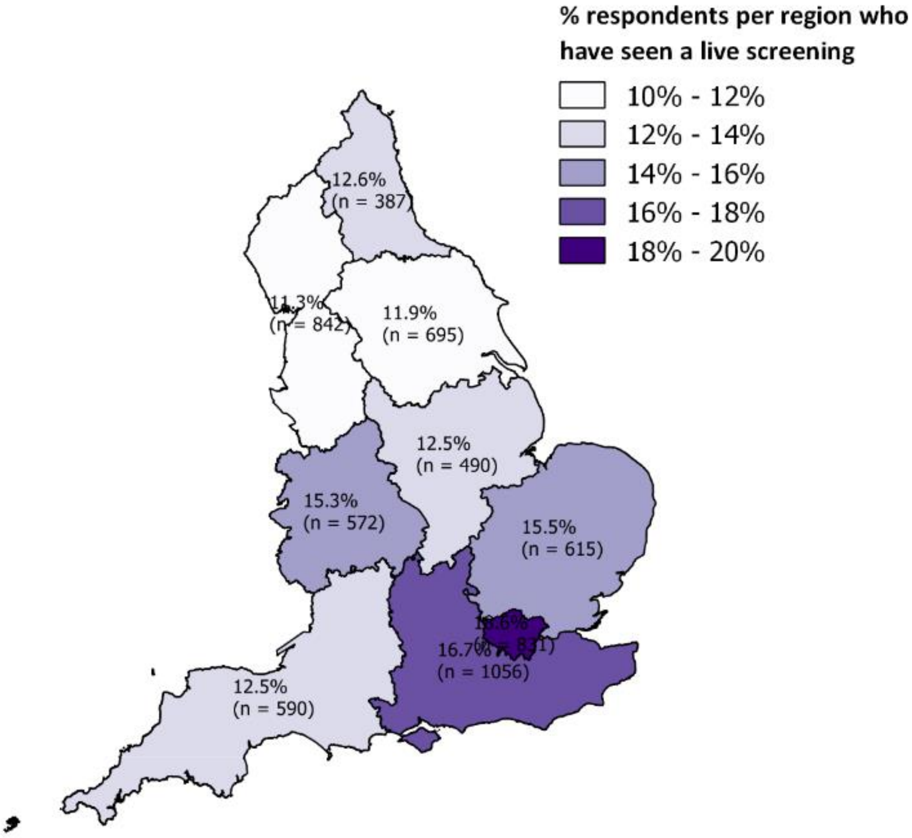


Figure 14 (below) shows the percentage of respondents in each region that have seen a live screening. The highest density appears in London and the surrounding areas, with the lowest proportions found in the North West and Yorkshire and The Humber. This does not lend support to the view that event cinema opens up live performances to those not in or near London. It is recognised that further data would be desirable in order to provide further context to this output. For example, information relating to the number of cinema screens, live screenings, live performances and live performances being screened in each region.

[51] Survey sent to a representative sample of the UK adult population in Jul 2014. Responses are not necessarily representative, for example age skews older. It is also acknowledged that the live screening question does not specify respondents needed to have viewed the live content in a cinema and therefore may include those that view live content elsewhere, such as the internet.

Figure 14: % respondents per region who have seen a live screening



Basic demographic information in Figure 15, Figure 16, and Figure 17 (below) shows that:

- The group who has seen live screenings are more ethnically diverse than those who have not.
- A slightly larger proportion of females represented within the group that has seen live screenings.
- The age profile is very similar between the two groups, though there is a notable drop in the proportion of 50 – 54 year olds who have seen live screenings. There is a slightly higher proportion of 65 – 69 year olds who have seen a live screening which aligns with anecdotal evidence that event cinema attracts an older crowd[52].

Higher ticket prices for event cinema are also thought to attract an older, more affluent clientele. Data analysed by the BFI relating to all cinema audience by age show proportions of admissions for each age group has been broadly similar between 2003 and 2013, and attribute fluctuations to the few successful titles that held strong appeal to particular age groups[53].

[52] The suggestion is that matinees will usually be attended by those over 65 who would rather go when it is quieter and easier to travel.
[53] BFI Statistical Yearbook 2014, Figure 15.1.

Figure 15: Age of live screening viewers

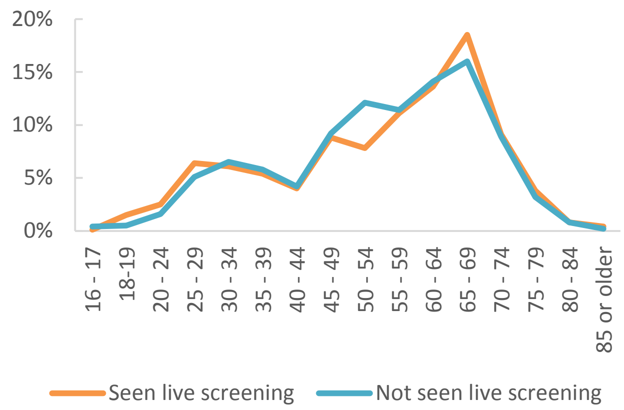
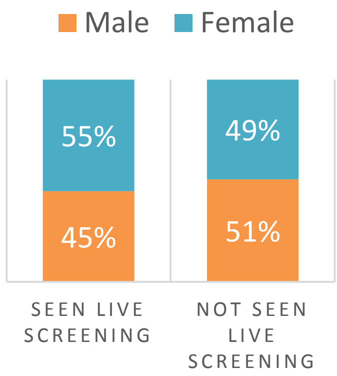
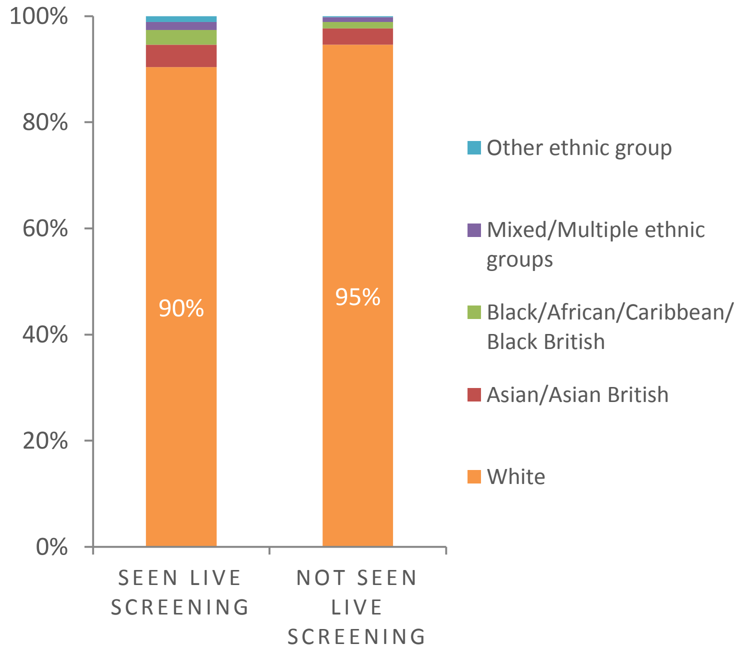


Figure 16: Gender of live screening viewers



Source: Audience Agency, Population Panel survey 2014

Figure 17: Ethnic groups of those who have seen a live screening



Source: Audience Agency, Population Panel survey 2014

The group who had seen live screenings are less likely to have dependent children living at home, and are slightly more likely to work part-time, be studying or retired than the group that had not, as shown in

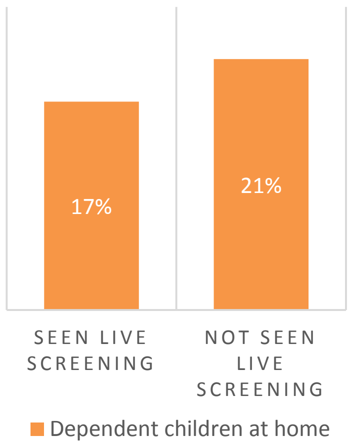


Figure 18 and Figure 19 below. Given the often higher ticket prices and off-peak scheduling of event cinema, it may be expected that we see higher engagement for those with more available time mid-week and/or disposable income.

Figure 18: Employment status for viewers of live screenings

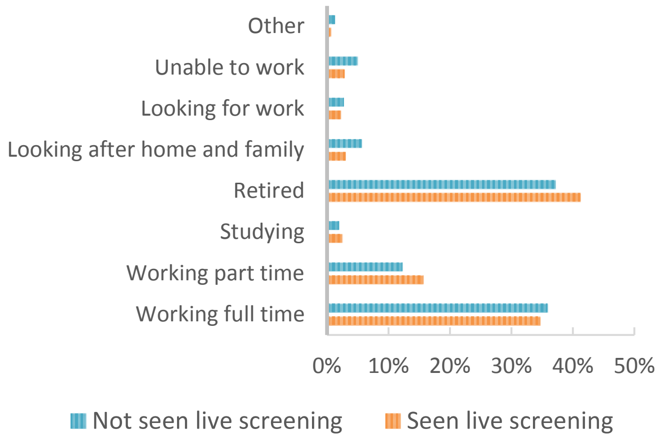
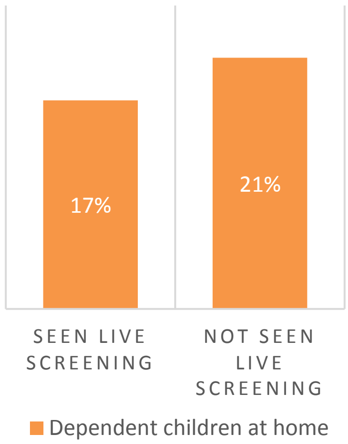


Figure 19: Dependent children at home



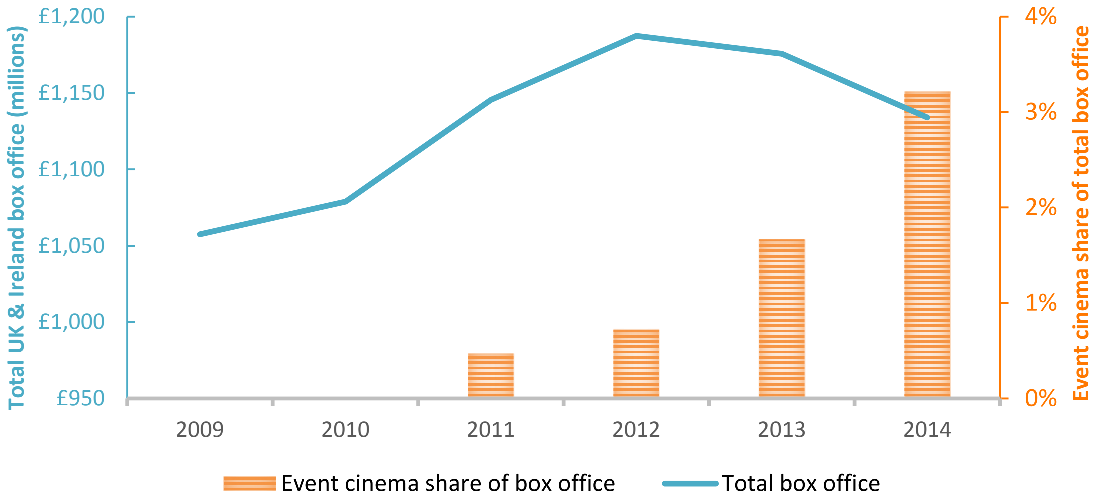
Source: Audience Agency, Population Panel survey 2014

5. The impact of event cinema

5.1 Box office, cinemas and film

The conversion to digital cinema projection systems and satellite links are enabling cinemas to expand their offering and create additional revenue streams. Globally, box office revenue generated by event cinema is forecast to surpass $1billion by 2019[54], and is credited with ensuring the survival of some struggling independent venues[55]. Figure 20 provides a comparison of event cinema's share of the box office in the UK & Ireland to the total box office value. This suggests that by securing around 3% of the box office figures at a time when overall figures are showing decline, it is likely that the exhibition sector of the film industry would be worse off without it.

Figure 20: Total box office sales and event cinema, UK & Ireland



Source: Various[56]

Event cinema has ensured that many independent cinemas have survived since its inception, which otherwise might have struggled. Picturehouse Entertainment, for example, report around 18 – 20% of their revenue is from event cinema. Event cinema represents an opportunity in a hostile environment, with examples such as Strode Theatre in Somerset quoted as saying that showing event cinema has "literally kept us open following loss of all local authority funding in 2011"[57].

Now that cinemas are equipped with the infrastructure to show event cinema (such as satellites) they are also able to put on complementary events such as showing live Q&As with actors and directors or showing scenes live from a red carpet. There are also examples of some film distributors viewing event cinema as an opportunity, rather than a threat. This ranges from producing event cinema content themselves, such as Universal with *Billy Elliot the Musical - Live*, to seeking unique marketing opportunities. The success of the film *Mr Turner* was considered by one consultee to be, in part, down to cinemas marketing the film to their event cinema audiences; an audience they might otherwise have found it difficult to target.

In this context, the potential for further diversification in event cinema content is seen as positive by some. For example, Showcase, which currently generates less than 2% from event cinema reported

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[54] Hancock, D. (2015) 'Event cinema: a sector in full swing.' IHS Technology Cinema Intelligence Service.
[55] Variety (26 September 2014) 'Live events give cinemas a boost worldwide'
[56] 2009 – 2013 data was provided by Rentrak; IHS Technology Cinema Intelligence Service (2015) provided the 2014 event cinema % share, while the 2014 total box office figure was obtained from Rentrak Press Release, Jan 2015.
[57] Pulse Survey, Arts Professional 2015. http://www.artsprofessional.co.uk/pulse

during consultation that they are unlikely to grow event cinema as a share of their market as much as arthouse or independent cinemas, as the subject matter tends not to target multiplexes' core audience. However, as event cinema continues to diversify, there may be an increase in offerings more suitable for multiplexes which may change this trend in the future.

There is some indication that film programming is being displaced and growing concern that arthouse or independent films are being pushed out of cinemas as venues look to increase their revenue[58]. The number of films produced in Europe has risen by more than 70% over the past decade[59], indicating an increasingly competitive market for traditional feature films (before taking into account competition from new genres). From consultations it is apparent that while some hold the opinion that event cinema is merely filling otherwise empty seats, others indicate that prime time slots that would otherwise be available for film screenings is being taken over by live performances of event cinema (a view supported by the Showcase Cinemas scheduling data, see Case study 1, page 13).

This kind of scheduling issue is likely to be a more significant issue for smaller independent or arthouse cinemas, who don't have the luxury of screen choice (in comparison to multiplexes) to accommodate event cinema alongside their usual offering. An example of this is Goodrich Quality Theaters in the US, with ten screens per building they are quoted as stating that their policy is never to interrupt a movie that opened on the previous Friday with events; the movie that the event replaces must be in at least its third week[60]. While other cinemas may not hold such policies, it does show that multiplexes have more capacity to adapt schedules to a more diverse offering.

Film distributors are also experiencing disruption to scheduling, and are not always told which slots their films will get. As such, they may be unaware that they are losing a key Saturday night spot. This can have a huge impact on revenue, particularly if it is the opening weekend for the film. Live performances can also be longer than a typical film and therefore scheduling a live stream of a 3 hour opera may result in two film screenings being lost. The resulting concern is that film companies will face increasing challenges in trying to recoup the huge costs involved in film production.

5.2 Content producers

For producers of event cinema content, the impact is harder to quantify. Their main motivation was stated as being to reach wider audiences and to promote their brand. Our research indicates that it seems to be delivering this impact, and is also bringing in new revenue streams for some producers. Royal Opera House, for example, felt that event cinema could only be positive in raising the profile of opera and ballet, particularly outside of London. They also felt it was helping to build communities and audiences who can connect by discussing the show over Twitter, regardless of location. One unanswered concern raised was whether audiences were expecting and receiving the brand 'experience' in the cinema (in terms of service, environment and food options) that they would get from attending live performances (at NT, ROH, RSC etc.) and if not, whether this has the potential to devalue the brands in any way.

As the event cinema market is led by large, well-known organisations, the impact this has on smaller organisations remains unclear. For example, if event cinema is opening up high-budget cultural events to those that previously have been unable to experience them, there may be potential for audiences of local theatres to suffer as a result. A concern raised by touring theatre companies is that the domination of event cinema by big players such as the National Theatre, means that small companies cannot compete

[58] Arthouse film – the new event cinema? – Sampomedia, March 2014. http://sampomedia.com/2014/03/07/arthouse-film-the-new-event-cinema last accessed on 16/06/2015
[59] Ibid.
[60] Choosing alternatives: New programming options eye mainstream acceptance - Sept 22, 2009 Film Journal International. http://www.filmjournal.com/node/3106 last accessed on 16/06/15

on a level playing field. Venues may increasingly prefer to broadcast a performance by a large company, since it is more profitable and less risky than putting on a production by a local or touring company[61].

On the other hand, there is indication that local theatres could benefit from event cinema. There are examples of smaller organisations producing content for live screenings. Cornwall-based Miracle Theatre, a digital R&D fund grant recipient, first experimented with the genre in 2013 by putting on their performance of *Waiting for Godot* at Falmouth University and streaming it over superfast broadband connections to other venues in Cornwall, Devon and Manchester[62]. The organisation, with only 3 full-time staff, had a successful performance though experienced technical challenges with the stream itself. Along with partners they used their learning from these experiences to explore the digital distribution opportunities for small-scale productions in innovative and economic ways[63]. One output of this is a shared business model template for filmed performance for cultural and arts organisations[64]. Insight and support such as this could provide opportunities for other small-scale performance organisations to enter this market, to reach new audiences, and to contribute to financial stability.

5.3 Audiences

Consultees for this study did not raise any concern with regard to adverse effects on audiences, though there was widespread acknowledgement that this was hard to test given the lack of data and how young event cinema is.

There is much conjecture of audiences being displaced, or 'cannibalised' through event cinema. However this study has found no evidence, nor sufficient data, to determine whether this is the case. Bakhshi and Whitby's 2014 study showed no cannibalisation of theatre attendance, though they note that better data is required to undertake more conclusive analysis[65]. A study into the Met Opera found that screenings neither cannibalised nor created new audiences for live opera, but instead that screenings established a new audience specifically for screened opera[66]. This is mirrored in the English Touring Opera study, which concluded that event cinema is more likely to inspire further attendance at a further cinema screening, rather than encourage people to transition to a theatre experience[67]. Existing research to date has been focused on the impact of event cinema on live performance audiences. There is a lack of evidence relating to the impact it may be having on film audiences and further research in this area is necessary.

The English Touring Opera study found that the age profile of audiences for cinema screenings was the same as those who attend live opera[68]. Although this was a small, London-focussed study, it tends to confirm Audience Agency findings (see Figure 21, below) that event cinema may largely be extending the arts content to an ageing and probably existing arts audience. This is also supported by a study into the Met Opera which found that most of those attending their screenings were already frequent or moderate opera-goers[69].

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61 The Guardian (6 May 2015) 'To beam or not to beam? How live broadcasts are changing theatre.' http://www.theguardian.com/stage/theatreblog/2015/may/06/effects-of-live-satellite-broadcasts-national-theatre-rsc

62 http://artsdigitalrnd.org.uk/features/miracle-theatre-livestreaming-feature/ last accessed on 20/07/2015

63 http://artsdigitalrnd.org.uk/projects/miracle-theatre-company/ last accessed on 20/07/2015

64 Produced as part of the Live & Digital project, Miracle Theatre partnered with Golant Media Ventures, the University of Falmouth, Dogbite and Cinegi. http://www.golantmediaventures.com/interesting/business-model-template-for-filmed-performance-public-consultation-launched last accessed on 20/07/2015

65 Bakhshi, H. and Whitby, A. (2014). Estimating the Impact of Live Simulcast on Theatre Attendance: An Application to London's National Theatre. [pdf] London: NESTA. Available at: http://www.nesta.org.uk/sites/default/files/1404_estimating_the_impact_of_live_simulcast_on_theatre_attendance.pdf

66 Van Eeden, Stephan (2009). The Impact of 'The Met: Live in HD' on Local Opera Attendance. Unpublished M.A. thesis. University of British Columbia. Available at: http://cercles.vtlseurope.com:8098/arxius/pdf/E140258.pdf

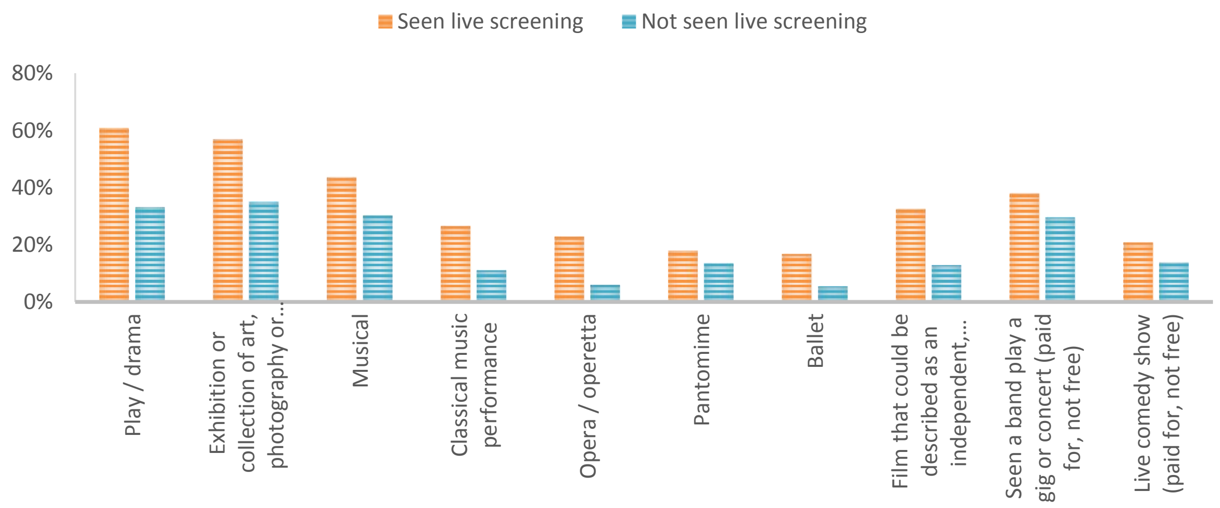
67 Wise, Karen (2014). English Touring Opera – Opera in Cinemas Report. [pdf] London: Creative Works. Available at: http://www.creativeworkslondon.org.uk/wp-content/uploads/2014/05/ETO-Working-paper-May-2014.pdf

68 Ibid

69 Shugoll Research (2008).Metropolitan Opera Live in HD Survey. [pdf] Maryland: Shugoll Research. Prepared for Opera America. Available at:

The data from the Audience Agency (below) reveals that those who have attended event cinema in the past are far more engaged with most other art forms than those who have never attended event cinema. Over a period of 12 months, the group that have attended event cinema previously make up a significantly higher proportion of attendance for most other art forms, including live performances, than the group that has never attended event cinema[70].

Figure 21: Engagement with other art forms in the last 12 months[71] between those that have seen live screenings and those that have not.



Source: Audience Agency, Population Panel Survey 2014.

This provides support to the theory that event cinema caters largely for individuals who already engage heavily with the arts. While this data does not provide information relating to the frequency of attendance, it does show that those who have seen streamings have also recently seen live performances. This lends support to the argument that event cinema does not result in a 'cannibalisation' effect with the data suggesting event cinema may be a complementary, rather than alternative, activity to those that attend live performances.

Conversely, Royal Opera House and English National Opera state that they are attracting new and younger audiences with the former considering this as a result of event cinema[72]. However, it should be noted that while these studies show corroboration, opera is a highly specific genre with a well-defined audience and the results are not necessarily applicable across the rest of the event cinema genres. When assessing the impacts of event cinema it may be important to consider individual arts genres separately. It is feasible that very different audiences will be attracted to opera than to a musical or theatre production. Similarly a film which concludes with a live Q&A session will be a very different experience to viewing a live stage performance. Although it is useful to be able to label event cinema as a collective entity, future research should also aim to assess specificities within the sector.

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http://snip.ly/Klkt#http://www.shugollresearch.net/published/fullfeaturedstudies/METROPOLITAN%20OPERA%20LIVE%20IN%20HD%20SURVEY.pdf

[70] Figure 19 shows only a selection of a possible 32 activities which chosen as comparable to existing event cinema genres. The live screening group showed significantly higher proportions across all other cultural activities with the exception of *circus*, *carnival* and *family film*. *The full title of the 8th category shown in the chart is 'Film that could be described as an independent, arthouse or non-mainstream'.

[71] Survey taken in July 2014.

[72] http://www.theguardian.com/music/2014/jun/06/new-york-met-opera-house-edge-precipice last accessed on 16th June 2015

6. The future of event cinema

The overarching view regarding the future of event cinema that emerged from our consultations was that it will continue to grow. Consultees felt that cinemas will continue to encourage it, and those offering it will continue to produce content. Although some felt that the recent growth spurt would plateau, or advance at a slower rate. In terms of the box office, it was felt that event cinema will grow in importance, but that it will never displace film as the key income source for any cinema companies. It was also suggested that as it grows and generates more money for distributors and producers, this growth may lead to the production of increasingly exciting content, though it is recognised that it may also just increase volume of the types of content being produced currently.

Whilst there are no firm predictions on future growth, speculations range from event cinema constituting 10% to 20% of the UK box office in 10 years[73]. Whilst generally seen as a positive evolution of the sector it is important to consider that the continued growth of event cinema poses a potential threat to UK film production. Anecdotal evidence (as discussed in section 5.1) indicates event cinema is competing with traditional film for prime time audiences, which poses a challenge in an already declining market.

6.1 Opportunities

Some consultees felt that further diversification in event cinema is likely. Examples provided were that there may be more for multiplexes than the current offering which is predominantly arts-based. Music is underexploited, and (whilst not part of this study) sport is considered to have untapped potential. In the US college football league games are screened successfully in cinemas. As an example, this could work for football in the UK, but the legalities such as television deals already in place would have to be circumvented in order for this to happen. Watching gaming is thought to be increasing in popularity and live comedy could also grow within cinemas. Given the popularity of the school-age film market it was also suggested during consultation that there may be demand for pre-school age events, which would presumably suit the event cinema model of being able to sell seats at off-peak times.

Growth and diversification will also increase competition in a market that already has well established organisations competing against each other. The established brands are likely to continue to grow their international presence through event cinema. More partnership working, such as National Theatre's venture to assist in streaming other theatres' work, will perhaps allow less established brands to showcase their work to new audiences and may result in more regional productions being screened nationally. One view from the consultation process suggests that as partnerships become stronger between cinemas and producers there is hope that it will allow performance venues to utilise cinemas as a tool for wider audience development and engagement.

As event cinema grows, the ECA is looking to integrate it into the mainstream so that people are just as likely to go to an event cinema screening as they are a summer blockbuster feature film. It will also continue to be used to complement film releases. Picturehouse Entertainment, for example, showed a preview of *The Stone Roses: Made of Stone* together with a Q&A session with Shane Meadows. The event itself was deemed a success, but importantly this continued when the film went on general release the following week. They have also introduced several other film releases in this way, such as *20,000 Days on Earth* and *Hockney.*

There is also potential for event cinema to grow beyond cinemas themselves. For example, arts venues with screens are increasingly looking to stage event cinema. This may also have an interesting impact on the terminology used as non-cinema venues may be reluctant to adopt the phrase 'event cinema'. Streaming online direct to home or to classrooms or lecture halls is also potentially an emerging area with potential to become more popular, and is already possible through companies such as Digital Theatre[74].

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[73] A figure of 15-20% was cited by IHS during a presentation at an Event Cinema Association conference, this was moderated to 10% via the consultation process for this study.
[74] Digital Theatre: www.digitaltheatre.com. An online platform specialising in delivering arts content.

6.2 Challenges

The ECA believes that the biggest barrier to future success and growth of event cinema is a current lack of public awareness. The ECA therefore seeks to give the sector a voice and to promote it, in particular through online and in-cinema advertising[75].

Poor production quality of live streamings and lack of marketing were cited as reasons for unsuccessful screenings during consultations. Consultees noted that investment should be made into areas such as training, human resource (for example dedicated event cinema teams) and marketing. Cinemas need to adapt to event cinema and provide specific attention through dedicated teams.

Now that cinemas are more accustomed to event cinema they are more confident about what will work and what won't when they offer performances. Event cinema productions can be considered a risk when a lack of support is offered with the event, such as limited mass media advertising spend[76]. Lead times can also be unmanageable; for example two to three weeks lead times are sometimes offered which is not long enough to sufficiently market the show (six+ weeks is preferable). As event cinema screenings are one-off events, there are limited box office budgets for marketing. The media hype around event cinema in its infancy was far greater than it is now despite it becoming more commonplace, which means that event cinema tends now to attract less press coverage.

In order to maintain successful screenings awareness needs to be built among exhibitors to ask the right questions of distributors before agreeing to work together. Similarly, consideration should be given to educating distributors on the minimum necessary standards when offering a production.

There are concerns that audiences have been put off event cinema having seen disappointing events. Poor sound quality, incorrect aspect ratios and black screens are some of the issues that audiences have experienced[77]. Initiatives like the ECA Technical Delivery Handbook[78] already seek to improve practices among producers.

Producing content for event cinema can also be expensive, which can inhibit how experimental producers can afford to be. They will be more inclined to choose popular shows that are guaranteed to have high ticket sales, even if they would rather be championing lesser known productions. Rights clearances can be an issue that will restrict content where theatrical licenses are not available. It is hoped that as the industry matures, more options will become available and event cinema offerings can continue to diversify.

The Arts Professional survey found almost half of respondents felt that live streaming is likely to benefit their organisation in the future, in contrast to only 5% who felt that they would not benefit at all. Nevertheless, concerns have been raised that as it evolves event cinema will become the dominant means of offering national access to the arts, with live touring and regional theatre suffering as a result[79]. It is hoped that event cinema will never become a substitute for experiencing live performances[80]. RSC, The Globe and Digital Theatre are among companies and venues calling for a national strategy for screenings of staged productions, in opposition to the National Theatre and Event Cinema Association. Calls for some form of strategy are also made by theatre companies and venue managers, who voice concerns that with no regulation of the market, it will be dominated by productions from the big players, disadvantaging smaller or local theatre companies. However, the National Theatre disagrees, preferring for event cinema to continue to develop organically[81].

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[75] Event Cinema Association 'About us: what we do' http://www.eventcinemaassociation.org/about.html
[76] Also referred to as 'above the line' spend, examples include advertising within newspapers, outdoor, television and cinemas.
[77] ECA Technical Delivery Handbook, Background. http://eventcinemaassociation.org/fji.html last accessed on 16/06/2015
[78] http://www.eventcinemaassociation.org/eca-technical-handbook.html
[79] Pulse Survey, Arts Professional 2015. http://www.artsprofessional.co.uk/pulse
[80] Excerpts from 'NT Live must not become a "substitute" for theatregoing' – The Stage 2014 available at: http://theatreroomasia.com/2014/01/22/something-to-stream-about/
[81] Arts Professional (1 May 2015) 'Sector split on need for national screening strategy'

6.2.1 The issue of marketing and management

An unexpected outcome of the consultation for this study was the emphasis placed on the importance of effective marketing and the (current) challenges to having this in place.

For cinemas the disadvantage of a one-off event is the lack of momentum or word of mouth promotion that comes from people being able to make recommendations to others. There is no continuous marketing campaign, so cinemas often only get one chance to really hook the audience in. Cinemas could improve on this by better segmenting their audience for targeted messages. However, one consultee felt that that arthouse cinemas currently have the upper hand on marketing because they have more of a crossover audience with live venues, which (proportionally) often sees them perform better on high art event cinema than multiplexes. For example, Picturehouse Cinemas have built up a database of people to market to as a result of teaming up with high end theatres and because they have now been screening event cinema for a number of years.

There is a view that whilst cinemas have increased the content shown over the years, they have not increased the amount of marketing space, such as poster sites, that are utilised. They may choose to advertise event cinema at these sites because these screenings have potential to bring more money in, which may be to the detriment of traditional film advertising. It is not clear if digital marketing space goes some way to make up for this. However, if cinemas continue to diversify their content it seems they will need to similarly diversify their marketing to accommodate this.

From a producer's perspective, there can be frustrations related to having little control over when cinemas show trailers and market productions on their websites. Most cinema websites will put all event cinema on one page (for example, Odeon Plus), whereas producers would prefer to integrate it with other films to increase the potential to attract new audiences. Similarly with trailers, cinemas may keep event cinema trailers solely with event cinema screenings whilst producers would prefer more integration.

It is clear that a cohesive and collaborative marketing approach between exhibitors and distributors is beneficial to the success of events, but not always easy to achieve. A non-competing approach between live and screened is recommended for, and by, producers. For example, marketing material that the Royal Opera House or the National Theatre produce for live performances will note that the production will be screened in cinemas.

7. Concluding remarks

This study sought to undertake preliminary research to improve understanding of the scope and nature of event cinema in England and assess evidence relating to its impacts. This has not been without challenges and section 7.1 below considers specific research challenges encountered. However, in terms of addressing the core research objectives[82], perhaps given the relative infancy of event cinema, the study has identified more data about scope and nature of event cinema than impact and implications. That said, there is still a need for more comprehensive data to clarify some of the basics around how much is happening, when, where and how this aligns with live cultural events.

From the data that is available, it is clear that over the last decade event cinema has firmly established a market. Rapid growth over recent years also gives every indication that event cinema is here to stay and will continue to expand. Understanding where the impact of this increase is felt is of crucial importance. This is touched on only lightly in existing literature and the data that we have been able to gather in this study provides limited further insight. In the absence of any empirical data there is, naturally, a lot of opinion. The consultations with key stakeholders highlighted a number of points to consider in relation to impacts, it is only feasible for this report to identify and introduce the debate around them. Understanding the impact on local theatres must also be considered a priority for further research. The lack of available audience data makes it impossible to understand if 'cannibalisation' or audience displacement is taking place at this level.

In terms of producing content to screen, it would be instructive to engage with the smaller organisations producing content (for example, Miracle Theatre or those that the National Theatre has started to partner with) to understand their experiences in this arena.

The data identifies that those who have viewed live screenings are far more likely to live in a city than those who haven't. The fact those living in rural areas or small towns and cities are less likely to have seen a live screening may suggest that local theatres are not experiencing displacement. However, it is difficult to know what to interpret from this because it has not been possible to align comparator data on attendance at live cultural events. Attending live screenings in a city may be more common simply because of capacity i.e. more venues with screens and therefore a wider offer. However, given that a stated aim of many content producers is to widen access, the smaller current audience in rural areas and small towns is food for thought. It would be interesting to engage with organisations such as Cinema For All or regional organisations such as Cine North to consider the extent to which event cinema is/can reach into local and community cinema.

The study has served to underpin the attraction and popularity of event cinema, demonstrated by the exceptional box office data. However, gaining a more detailed understanding of the impact on the UK film industry is crucial. The research provides evidence to contradict the notion that event cinema is something to fill mid-week gaps in occupancy. The case study data from Showcase Cinemas depicted a gradual movement away from mid-week toward weekend slots that are traditionally prime time for film. It would be useful to collect more scheduling data to get a more consistent view on the slots event cinema occupies to assess the extent to which it competes with or complements traditional film.

The evidence remains inconclusive as to whether event cinema is a means for attracting new audiences. As noted above, the evaluation of the National Theatre's 2009 pilot run of event cinema broadcasts highlighted that the programme had been successful in widening the audience, attracting lower income audiences than those attending the theatre. However, it was also noted that the extent to which entirely new audiences were attracted was limited. Data from Met Opera and ENO evaluations suggest that

[82] Which were to: deliver an improved understanding of the scope and nature of event cinema in England, consider the evidence for the impact, both positive and negative, of screenings of event cinema in cinemas, upon audiences, the cinemas themselves, distributors, production companies and the arts/culture/film sectors more broadly and to use this understanding to inform the development of public policy and investment for the film and cultural sectors based on the emerging findings if any are, identified.

event cinema tends to create audiences for more event cinema and the Audience Agency data suggests that those attending live screenings are likely to also be engaged in the arts. This is a conundrum that only further research can seek to resolve.

Event cinema appears to be prompting change and innovation in the cinema industry. Feedback during consultation indicated that some cinemas are adapting to cater to event cinema. Examples include that 'boutique' cinemas are opening and existing cinemas are changing layouts to accommodate sofas and wine coolers next to seats in order to enhance the overall experience. There was also suggestion that event cinema is creating jobs, though it has been challenging to try to corroborate and quantify this.

7.1 Research challenges

The indication is that data availability and collection will improve somewhat in the near future and we are aware that there is more data in existence that was not available for this particular study. Whilst this is good news for the sector, challenges need to be addressed around promoting data sharing to ensure it can benefit all involved, collating disparate datasets to help form a holistic view of this complex market.

The UK is regarded as a global leader of event cinema, with a diverse offering and the right infrastructure in place to support future growth. The leading position of the UK in the event cinema market also provides a strong position from which to pioneer research in the field. We are theoretically in possession of a rich source of data on this emerging global sector. However, co-ordinating these data assets to unlock the potential requires co-operation and, crucially, clear leadership of the agenda.

As noted in the introduction, the aim of this study was to explore the data currently available on event cinema, collect as much of this as possible, undertake brief consultation with key stakeholders and produce a narrative report to set the scene and help direct any subsequent studies. As an exploratory piece of research into a relatively new subject matter, it was expected that challenges would arise regarding the availability of data. The most pressing of these were:

- Rentrak[83] is a key source of data when considering the scale and economic value of event cinema within cinemas[84]. However, the data is not openly available for use in this kind of research project. It may be pertinent to consider negotiating with Rentrak to become a partner in future studies, which will ensure this data can be used to its full potential. While we were able to obtain aggregated Rentrak data for use in this research, at times the lack of flexibility over the data available resulted in limitations on the analysis, such as performing like-for-like comparisons between datasets.

- During the course of the study a number of additional data sources were identified that were not available for use in this research. This included survey data with audiences from event cinema screenings and ticket sales data for both theatre and cinema. Some organisations were not currently in a position to easily access data, but indicated that their systems were due to be upgraded and in future this data would become available. On other occasions data were not provided within the timescales required by this research. Organisations were generally very keen to contribute, but some felt that there were sensitivities within their data that they would have to assess before deciding whether to provide it or not. To facilitate this, those undertaking future studies should engage with providers at the earliest point with a clear brief on how the data will be used in order to give organisations time to consider what they can release.

- The multi-stakeholder nature of event cinema means there is a lack of a joined up view. Cinemas and producers of content hold their own data and record it differently. To obtain a full overview, a collaborative approach to data collection and sharing would be required. This would be

[83] www.rentrak.com; Rentrak provides transactional media measurement and analytical services to the entertainment and media industries. They provide a service for subscribers that allows access to near real-time reporting of box office data.
[84] However, it should be noted that Rentrak does not cover screens in theatres or arts venues.

supported by the development of clear stakeholder map, outlining key organisations/groups across the sector and how they interact.

- When looking at genres within event cinema, categories are not always consistent between datasets. This issue may become amplified if event cinema diversifies further. Going forward, consistency as well as granularity will be important. For example a category such as 'Film/Documentary'[85] may cover a variety of very different productions in the context of event cinema. This could include the broadcast of a film premiere with live footage from the red carpet before the screening; a documentary followed by a live question and answer session or a television programme that has no live element but is screened as an event by being broadcast in cinemas. An example of the latter is the 50th anniversary episode of Dr Who which was broadcast simultaneously on BBC television as well as screened in 3D in cinemas across the UK and further afield[86].

7.2 Potential further research

A natural next step following this project would be a more comprehensive sector study, in which time can be dedicated to resolving some of the research challenges outlined above and an expanded consultation undertaken. However, it is important to consider the objective of any future research and the purpose for which the evidence is required. For example, whether to inform policy, to provide practical support etc. It is also important to consider the alternative perspectives of the arts and cultural sector and the film sector in any future piece of work. Whilst the term event cinema was adopted for this study, this doesn't comfortably encapsulate the whole range of activity and may prove to be complicating factor moving forward; as may issues around genre of content and types of exhibition venues that are of interest (e.g. not just cinemas or theatres with screens). The suggestion above regarding the development of clear stakeholder/sector map may be useful starting point to provide a simple overview of the extent of the sector and areas of interest/remit for ACE and BFI.

In terms of future lines of enquiry, notes have been made throughout the report regarding potential topics for further research. These are brought together here for ease of consideration moving forward.

- Understanding the impact on local theatres must also be considered a priority for further research. The lack of available audience data makes it impossible to understand if 'cannibalisation' or audience displacement is taking place at this level.
- Engage with organisations such as Cinema For All or regional organisations such as Cine North to consider the extent to which event cinema is/can reach into local and community cinema.
- Explore the hypothesis that transmitting live shows helps to build brand recognition and stronger live performance box offices for distributors by obtaining and analysing data on individual productions to explore any correlations between attendance figures for live performances and screened events.
- Further exploration of effective event cinema business models across producers and distributors of different scales in order to consider whether (and how) broadcasts are a viable option for smaller companies.
- Use linked ticket data from cinemas to examine attendance habits of customers and explore whether event cinema does lead cinemas to broaden audiences.

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[85] This category is used within the BFI Statistical Yearbook 2014, based on Rentrak data to categorise event cinema by type. Film/documentary is accompanied by Theatre, Opera, Ballet, Exhibition, Classical concert, Popular music concert and Comedy.
[86] http://www.bbc.co.uk/news/entertainment-arts-25076912 accessed on 16/06/2015

- Gather screening data (as per the Showcase Cinema case study) from other cinema chains and groups in order to consider wider trends for event cinema screening times and levels of competition for prime-time slots.
- Consider the reach of event cinema by building widest point of release data to include information on number of screens used in addition to the number of sites.
- Undertake consistent price tracking across 2D films and event cinema screenings in order to maintain a view on cost comparisons.
- Undertake broader research to understand general awareness of event cinema.
- Consider the role of geographical distance in informing decision to attend event cinema. Develop data that will allow for an examination of buying patterns to examine the location of purchaser and location of screening.
- Understand more about the motivations to attend event cinema across genres to consider whether there are variations depending on format.
- Balance existing research on the impact of event cinema on live performance audiences with further research on the impact on film audiences.
- The implications, if any, of the findings in this report on future public policy and funding priorities.