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***Cultural Leaders in Digital Cinema Distribution: What can film learn from opera and theatre?***

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# Cultural Leaders in Digital Cinema Distribution

What can Film learn from Opera & Theatre?

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## **Abstract**

According to Rentrak, 17 of the 'British and Irish Films' listed in the 'UK and Ireland's Top 50 Releases 2013' were not traditional 'films', but actually 'Event Cinema', ranging from the National Theatre's Othello to the Royal Opera House's Turandot.

Filmmakers could perceive Event Cinema as a growing threat to their own content and choose to fear, ignore or reject it. However, this paper offers British Filmmakers an opportunity to draw inspiration and learning from the new approaches to producing, distributing and marketing that alternative digital cinema content offers.

This research examines the recent success of Event Cinema in the UK with a focus on case studies of the National Theatre's NT Live and the Royal Opera House's ROH Live. In doing so it seeks to identify key lessons which can be learnt from Theatre and Opera and applied to Film.

A short film of key contributions:

[CLICK HERE TO PLAY FILM VIA YOUTUBE.COM/RESOURCEPRODUCTIONS](https://www.youtube.com/resourceproductions)

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## 1. Introduction

As both a Producer and Trainer, this paper has practical relevance to my own area of work; Film Distribution, Film Production, Film Education and Talent Development. More specifically it seeks to address the challenge that myself and many of my UK Filmmaking peers face in finding a cinema audience for our work in a highly saturated and Hollywood-dominated marketplace. I have spent over a decade supporting and nurturing young British filmmaking talent and am frustrated by the lack of innovation within the film sector in terms of enabling low-budget independent films to reach new more niche audiences.

There is one core long-standing model for distribution of feature film which is summarised by Creative Skillset (2014) as a way of "launching and sustaining films in the marketplace." Some film distribution companies are vertically integrated into a Hollywood studio system, others are Independent and primarily handle films financed outside the Hollywood system, which are usually country specific. Both currently make use of 'windows' which Reiss (2010) describes as "the amount of time that rights are allowed to be exploited in one market before the film is made available for exploitation in another market.". This means that distributors might first release the film theatrically (eg Cinema), then move on to pay per view Video-On-Demand (eg Blinkbox), then Home Video (eg DVD) then Pay TV (eg Sky), then finally free TV (eg BBC).

The current independent UK film distribution model continues to follow this simplistic structure, relying heavily on the success of its theatrical release, to set the consecutive windows and does not inspire innovation or creativity, but I believe that there are lessons to be learnt about digital cinema content, distribution and marketing from leaders within Opera and Theatre.

Through the Clore Leadership Programme, I was able to meet a wide range of cultural leaders in digital distribution including individuals from the Royal Opera House and the National Theatre and explore these themes informally. This paper seeks to build on this exploration to further investigate how culturally and financially viable these new distribution business models and processes have been.

There is a sense that as Film is an 'Industry' it must already know what works and therefore need not take advice from other artforms. In fact Filmmakers with whom I have informally discussed this, including Directors Roger Michell (Hyde Park on Hudson/Notting Hill) and Richard Eyre (Carmen/Iris) at a 2012 London Film Festival Q&A, have been vehement about how bad it is that Opera and Theatre are 'bastardising' the cinematic form. At the same time innovators in Opera and Theatre, like David Sabel (Head of Digital at National Theatre) seem unaware of the model that they have successfully broken and are hurtling headlong into the traditional world of Film to embark on the NT's first Feature.

These examples and views pose real challenges for independent British filmmakers wishing to innovate at a time when UK cinemas are undergoing a "Market growth stall" according to Oliver (2013) and when British film is struggling to compete internationally. "UK independent films earned just 1.8% of global revenues (in 2012) with a gross box office of \$625 million, down from \$900 million in 2011." according to Perkins et al (2013).

These new developments in Theatre and Opera are being keenly followed by Sports, Museums and a multitude of competitors, so what, if anything, can Independent British Filmmakers learn from this new content, its production and distribution to ensure that British Film secures its place as successfully within our cinemas?

## **2. Literature Review**

This review covers three core areas: Digital Distribution, UK Box Office, and Alternative or Event Cinema with a focus on the National Theatre and the Royal Opera House.

Baillieu and Goodchild (2002) provide a general overview of the British film business, prefacing their work with a warning to the then Film Council (whose activities have since been taken over by the BFI) that they should "absorb the marketing lessons of Hollywood and changes that the internet is bringing to distribution techniques and viewing habits".

Parks' (2012) 'Insider's guide to Independent Film Distribution' offers a practical overview of film distribution from the perspective of an Independent Producer. She notes the demise



of minimum guarantee/advances and claims that three core elements are essential for any content producers aiming to pre-sell their content to a distributor:

- A List stars
- Own Funding
- Evidence of ability to deliver the product

Levison (2007) details a range of strategies, business models and finance plans for securing film distribution and in addition cites the need for:

- Uniqueness of story line
- Genre
- Tie-in from another medium
- Specialist audience segment

Reiss (2010) details the traditional distribution system and the traditional application of 'Windows' to distribute a film from market to market:

- Theatrical
- Television
- Education
- DVD/Home Video

He moves on to note the collapse of these windows and an emergence of 'Day and Date' method of release which involves releasing a film in more than two markets on one shared release date.

Terry N., De'Armond D and Zachary M. (2009) produced a paper on the determinants of opening weekend box office revenues which highlighted the importance of "seasonal pattern". They cite the contradictory Litman (1983) and Sochay (1994) who respectively place Christmas and the Summer as the most important release seasons.

Moon S., Bergey P. K. and Iacobucci D. (2010) examined the dynamic effects among movie ratings, movie revenues and viewer satisfaction, finding that "pre-release critics' ratings contribute significantly to the Theater revenues in the opening week" whilst "amateurs ratings begin to influence Theater revenues in the following week".

Barman D. and Chowdhury N. (2013) carried out a quantitative analysis of the possibility of predicting the profit/loss of a new movie based on its genre. They came to the conclusion that genre alone can not enable effective sales prediction, but that it is a key determinant. Hennig-Thurau T, Fuchs S. and Houston M. B. (2013) have analysed the 'Monetary value of Motion Pictures' but with a focus on TV rights. The researchers discuss the irrelevance of films winning Awards on the TV audience and also propose that TV rights offer the "highest profit center" for a Producer.

Chao C. and Zhao S. (2013) have written a paper on the challenges to traditional DVD rental and highlight the threat to cinemas from a "double-digit growth" in converting and preparing content for the "digital realm". They highlight that in 2012 Americans spent more money watching movies at home than the previous year and repeatedly references 'Netflix' as a competitor case study to traditional models.

There are four British Film Institute (BFI) 'Insight reports' on experimental release models and creative marketing strategies that seek to exploit non-traditional theatrical and marketing routes, developed through the BFI's New Models strand of the Distribution Fund. Authors offer methodologies and findings from four alternative approaches to UK Film releasing. Cain M. (2013) reports on 'In Real Life', a marketing campaign with strong emphasis on digital media and PR, using analytics to refine the target audience, whilst Gubbins M. and Buckingham P. (2013) cover 'What Maisie Knew', a Multi-platform simultaneous release, with a premium VoD window. 'A Field in England', had a unique distribution strategy which saw Ben Wheatley's film released in nationwide cinemas, on free TV, on DVD and on Video-on-Demand on the same day while 'A Late Quartet', had a Multi-platform simultaneous release, with a premium VoD window.

In addition the BFI made awards to support distributors looking at new ways of reaching audiences, such as using new marketing techniques, new distribution platforms or innovative exhibition models. Case studies were produced to share the findings from these releases. Two case studies have been published on 2013 awards. Trinity Filmed Entertainment's 'A Liar's Autobiography', an event-driven simultaneous multi-platform release and Network Distributing Ltd's 'No', a multi-platform release with a reduced

window strategy, each seeking to experiment with the compression of the traditional extensive imposed delay between the release of the film on each platform.

Perkins S., Maine N. and Tosta A. (2013) compiled the BFI's Annual Statistical Yearbook, offering an overview of UK film education, production, distribution and exhibition but making just two references to digital distribution. They do, however, clearly separate out 'Event cinema, alternative content or non-feature film programming' and note that "there were 131 alternative content events in UK cinemas in 2012, compared with 109 in 2011" of which Opera formed the highest percentage. They also highlight the growing related Box Office increase from £10.5m in 2011 to £12.5m in 2012.

MINTEL publishes an annual report on UK Cinemas; conclusions from the 2013 report can be summarised as follows:

- UK cinema revenues overall 'stalled' in 2013.
- Three major operators were identified: Odeon, Cineworld and Vue.
- Cineworld notably purchased the independent Picturehouse.
- The impact of 3-D Cinema is beginning to wear off.
- There is a little scope for incremental price increases.

The report's author Oliver (2013) also produced a supporting paper on 'Issues in the Market'. Amongst current issues for UK cinemas, Oliver cites a need to reduce reliance on film distributors, capitalise on technological advances, increase customer spend on food and drink and diversify away from a youth demographic. He specifically references the importance of "getting people through the doors at off-peak times of the year" and proposes that "Alternative content can be tailored to local markets and to certain times of the week or year. Cinemas operators can create the must-see events, whether this encompasses re-screenings of old films or live cultural events". Oliver goes on to place a clear imperative on positioning cinemas as a destination for more than just the latest Hollywood hit.

The concept of using alternative content to increase revenue 'off-peak' is reiterated by Sluis S. (2009) who comments that "It's inevitable that movie houses will come to be known as entertainment centers". As leaders in championing non-film content, the Event Cinema Association (ECA) and the European Digital Cinema Forum (EDCF) refer to

Wilson P's (2012) largely technical 'EDCF Guide to Alternative Content', which offers practical guidance and is complemented by Distributor More2Screen's 'Hands on practical Guide to Alternative content for small cinemas' (2012).

Further research into alternative, aka Event Cinema (EC), reveals that Hancock D. (2013) recently produced the first data-based study into alternative content on a European level in which he uses data from IHS Screen Digest to credit the UK as being "the most advanced market for EC in Europe". This study breaks down the types of EC into Markets ranging from the largest (Opera) to the smallest (Film Q&A).

According to Rentrak, out of the 'UK and Ireland Top 50 Releases 2013 British and Irish Films' 17 out of 50 'films' were in fact 'Event Cinema' ranging from the National Theatre's Othello to the Royal Opera House's Turandot. Of these 17, 6 were National Theatre productions and 6 were Royal Opera House productions. This is particularly pertinent, when considering that in the same report from 2008 (just five years before) event cinema doesn't even feature in the top 50 as it hadn't formally arrived in our cinemas. It is therefore fair to assume that this is an increasingly popular form of content, which should not be overlooked, especially by its local competitor, the British filmmaker.

Moving away from Film, Towse R. and Handka's C. (2013) collection of 37 papers on the 'Digital Creative Economy' which focus on the implications of digitisation for the Creative Industries. Additional Arts-focused papers on similar topics include 'Not Rocket Science' by Bakhshi H., Desai R. and Freeman A. (2009) which positions itself as 'A Roadmap for Arts and Cultural R&D'. The authors make passing reference to the 'well known' problems facing the film industry (in relation to digital technologies), but its focus is on "opportunities for extending the production and consumption of the arts to previously unreachable constituencies". Walmsley B. (2005) raises 'Key Issues in the Arts and Entertainment Industry' and details a range of business models, referencing the Watershed Cinema as a Case Study.

The most specifically relevant and directly linked articles and reports have been commissioned by the National Endowment for Science, Technology and the Arts (NESTA). Bakhshi H. and Throsby D. (2009) compiled an interim report for NESTA on 'Innovation in

Arts and Cultural Organisations' which encouraged arts and cultural organisations to examine "how they can use innovative digital technologies to expand, and deepen their relationships with, audiences". Bakhshi H., Mateos-Garcia J. and Throsby D. (2010) then produced a paper entitled 'Beyond Live' which examined 'Digital Innovation in the performing Arts' which explicitly examined the NT Live pilots. Bakhshi H. and Throsby (2010) went on to produce 'Culture of Innovation' which further explored their collaboration with the National Theatre and the Tate.

Bakhshi H. and Throsby (2012) most recently published a paper entitled 'New technologies in cultural institutions: theory, evidence and policy implications' which provides a framework for assessing technological innovation in cultural institutions, and discusses the ramifications of such a framework for cultural policy drawing directly on case studies of the Tate and National Theatre.

Whilst both the National Theatre and Royal Opera House are both Arts Council England (ACE) National Portfolio Organisations (NPO), each receiving significant public investment (Royal Opera House £25,208,100 and National Theatre £17,462,920 in 2012/13), ACE do not appear to have commissioned any specific research into the models that they have piloted. Indeed the 2012 ACE 'Digital Opportunities' research appears to focus primarily on online opportunities.

However, there has been much written about the National Theatre's NT Live pilots ranging from internal reflections summarised in a public presentation compiled by NT Live Producer Emma Keith, to an extensive NESTA-backed case study prefaced by NT Head of Digital David Sabel. The National Theatre's Annual reports also provide additional insights on the strand. However, less is publicly available on ROH: Live, with only a case study pulled together by Arts Alliance for a conference easily publicly accessible.

### **3. Objectives**

#### **Effect attitude change within British Independent Film production and distribution.**

The aspiration is to further break down the distribution silo within which Film holds itself, encouraging filmmakers to use alternative production and distribution models from other sectors and ultimately improve public access to independent UK Films. The aspiration is

that this paper will challenge existing approaches of UK filmmakers to Digital Cinema Distribution and open up the minds of leaders within the Film sector to the ideas of cultural leaders within other sectors and artforms.

### **Improve the sustainability of British Film.**

Film is an expensive and 'high-risk' artform, which is regarded as a commercial industry, but often operates as a cottage industry within the UK. This work aims to assist in helping inform the development of our Creative Industries and work towards building a self-sustaining model of filmmaking that enables talent development at reduced cost to the public.

## **4. Methodology**

### **Produce a Distribution Checklist.**

Based on the literature review carried out, all the authors suggestions for effective distribution will be collated into a simple checklist. This will enable content producers to identify the challenges and opportunities ahead for both British feature film and non-feature film content.

### **Identify findings from Theatre and Opera.**

The existing case studies of the NT Live and ROH Live will be examined alongside transcriptions of one to one own interviews with key cultural leaders in Event Cinema. These additional lessons learnt will be extracted and added to the checklist and it is envisaged that they may prove useful for independent UK Film Producers.

### **Propose a Pilot Model.**

In conclusion a basic suggested model will be proposed, to pilot the development, financing, production and distribution of a low-budget British feature film, based on all of the core elements on the checklist. This would eventually enable the testing of an alternative digital cinema model, which builds on the Arts approach to Event Cinema.

### **Disseminate across Film sector.**

A short film will accompany this paper and both the paper and film will be distributed through a range of Independent Filmmaker and Film Industry networks. Upon completion

of the research additional funding will be sought from either the Skillset Film Fund, the BFI Research and Statistics Fund, NESTA or ACE to run an event to discuss the findings of this and related papers on the connected issues, which will further build on the potential application of any outcomes.

## **5. Findings and Analysis**

### **a. Literature Analysis**

Based on the review of literature above, the following key components to support effective distribution have been identified to date: Intensive Marketing (Baillieu and Goodchild, 2002), A-List Stars, own funding, evidence ability to deliver the product (Parks, 2012), unique story line, tie-in from another medium, specialist audience segment (Levison 2007), popular genre (Barman D. and Chowdhury N., 2013), Theatrical and DVD/Home Day and Date release (Reiss, J., 2010), TV rights (Hennig-Thurau T, Fuchs S. and Houston M. B., 2013), Digital download options, (Chao C. and Zhao S., 2013), Christmas or Summer release (Terry N., De'Armond D and Zachary M., 2009), pre-release critics reviews, ongoing amateur reviews, (Moon S., Bergey P. K. and Iacobucci D., 2010), ticket price increase, reduced reliance on distributors, increased spend on food and drink, diversification away from youth demographic, create an event (Oliver, M., 2013), screen at an entertainment centre (Sluis S., 2009).

**b. Here is the initial resulting Distribution Checklist**

<b>No.</b>	<b>Item</b>	<b>Example</b>
1	Intensive Marketing	Multiple media channels, e.g. tube ads
2	A-List Stars	Household name, e.g. Brad Pitt
3	Own funding	Cash invested, e.g. public funding
4	Ability to deliver the product	Track-record, e.g. previous success
5	Unique story line	Unusual content, e.g. tie-in with real life
6	Tie-in from another medium	Other artforms, e.g. book
7	Specialist audience segment	Niche group, e.g. Morris Men
8	Popular Genre	Identifiable genre, e.g. comedy
9	Day and Date open	Simultaneous release, e.g. Cinema/TV
10	TV rights	TV partner on-board, e.g. BBC Films
11	Digital download	Online partner on-board, e.g. Netflix
12	Seasonal positioning	Select right time, e.g. Christmas release
13	Professional reviews	Pre-release critical review e.g. Guardian
14	Amateur reviews	Ongoing viewer reviews e.g. fan blog
15	Ticket price increase	Reflect 'event' in price e.g. premium
16	Vertical integration	Reduce reliance on distributors e.g. self-dist.
17	Increased spend on food/drink	Offer specialist refreshments e.g. wine
18	Affluent audiences	Non-youth demographic e.g. grey pound
19	Create an event	Not just film e.g. live elements
20	Screen at entertainment centre	Non-traditional venue e.g. Arts centre



### **c. Findings from Interviews relating to Theatre and Opera Case Studies**

#### **Why digitally distribute Theatre and Opera through Cinemas?**

As an organisation funded by the tax payer through the Arts Council, Emma Keith (Producer, National Theatre Live) noted that one of the aims of the National Theatre is for as many people as possible to engage with their work through a variety of different models. That does happen at their home on the Southbank and through touring across the UK, but they also wanted to look at other ways to distribute their content and enable more people to engage with it. She felt that the reason that the National Theatre chose to go down the cinema route to do this, was about a shared collective audience experience, somehow keeping the electricity and the thrill of a live performance. This offered a more interesting alternative to simply recording performances and making them available on TV or DVD. Previously, at the end of 2007, the Met Opera had started live broadcasts and it appeared to be a model which could be replicated. At the same time David Sabel, who is now the Executive Producer for NT Live, was doing an MBA at Cambridge and he came to the National to do a feasibility study on live broadcasting of NT performances. He primarily looked at three different aspects: finance, artform and rights. So although NT Live was very much about increasing access to their work, it did have to stand up to scrutiny from a creative and financial point of view.

Phil Clapp (Chief Executive, Cinema Exhibitors' Association) observed that publicly-funded arts organisations are under pressure to reach a broader audience. However, he also felt it was self-serving for these companies to extend their reach, in more ways than they could do from just their London bases and productions. He commented that if you're looking for a network through which to distribute, which offered an unparalleled depth and breadth of reach, then UK cinemas are the obvious answer. Just as the Met model was coming to fruition, the UK had just established a fully digitised network of cinemas and so the timing was also very fortunate.

Clapp also sees it from Cinema's perspective, he believes that Cinema, has for the last few decades relied primarily on a 16-34 year old audience; that audience is now fewer in number and less economically profitable. Theatre and Opera can extend that reach by embracing an ageing population. The ability to reach out to a new, older audience and

sustain that audience over the long term is clearly helping to develop something which is very much in the self-interest of cinema. The long term aim is to grow the audience.

Howard Kiedaisch (Chief Executive, Arts Alliance Media) also raised the importance of a network of digitised Cinemas. He felt that this network was stimulated by the UK Film Council, who had wanted to digitise 240 screens in the UK in order to get more independent or European films on the screen. So the UKFC used the offer of a digital projector at a subsidised rate as a bargaining tool to encourage exhibitors to play more specialised independent films. At the same time the UKFC also put a call out to integrated technology companies to identify a company that would be subsidised to install and manage this new digital network. Kiedaisch goes on to recount the bidding war between the "big guys like technicolour" and the likes of AAM, who were eventually successful in securing the contract. This ultimately led to the position they find themselves in now, where content producers like The Royal Opera House, capture, shoot and produce content, then they give it to AAM who beam it out live. They can offer Theatre and Opera Producers theatrical distribution, marketing and sales.

Clare Binns (Director of Programming and Acquisitions, Picturehouse) also cited advances in digital Cinema Technology as a driving factor. She felt that the world is much more joined up in terms of what is now possible. The fact that you can take something that is broadcast from the US into the UK, shows us that technology has allowed us to have much more freedom in how we programme cinema. It has also enabled cinemas to better understand their audiences. She knew that Picturehouse audiences wanted to go to the Theatre and Opera and if they couldn't afford to fly to New York and pay hundreds of dollars to see the Metropolitan Opera in New York, the fact that you can see it in the UK, live, is a wonderful thing. Picturehouse knew that would be attractive to their audiences. She looks at it as "just an extension of what we do as a cinema".

### **Who owns the rights?**

Keith highlighted a key difference in the way that the National Theatre approaches productions for cinema. They don't bring in an external production company, it's produced in-house and they have full flexibility on the night that they broadcast. All the seats in the auditorium are held back from sales until they know where the cameras are going and

then they're put on sale afterwards, usually at a reduced ticket price. That allows them to have a bespoke approach for every single broadcast so there are no two shows that have the same camera set up. They use the approach that best suits that particular broadcast and that was important artistically because they wanted to be able to preserve the integrity of what goes on-screen. Keith importantly flagged that the National produces a lot of things in-house: sets, costumes, armoury, wigs etc. All of that happens by people employed by the National Theatre and so it was very important that that kind of ethos was carried across through into NT Live.

There wasn't really an existing rights model in place that would work for theatre distribution to cinema; it was very much based around either TV sales or turning something into a film. So the National did a lot of work in terms of rights negotiations, approaching all the Unions, primarily Equity and BECTU. To summarise they only negotiated rights for the cinema broadcast. They don't initially negotiate rights for online distribution or DVD for example and they only negotiate for a limited window. This limited window is usually around about eight weeks from the live date, so avoiding trying to secure all the rights for evermore. This also generated some goodwill from agents and unions because they weren't trying to get absolutely everything from them. They were saying "what we want to do is put our work into cinemas, therefore we were just going to negotiate the rights on that". The result is that whenever the National now do an encore screening, they have to renegotiate the rights on each occasion. However, Keith feels that it was very important that they didn't just ask for blanket rights up front, as it meant that they could keep the costs down.

### **How is it marketed?**

NT Live launched in June 2009 with a broadcast of "*Phèdre*" with Helen Mirren which was a high profile production. It's not the most well-known of plays but Helen Mirren carries through to cinema audiences. It was a production directed by Nick Hytner and that was seen by about 50,000 people across the World in about 22 countries. The National is currently about half way through their fifth season. They've done 34 broadcasts and their average audience now is between 100,000 and 150,000 people around the World. They are still trying to develop their distribution, as when they first started in the UK, they were in about 70 venues, they're now in c500 venues across the UK.

They produce high quality trailers for each production and getting them on the cinema screen is key. Keith stresses the importance of talking to people in the environment in which they'll be able to watch the broadcast and telling them what's coming up. They also use traditional film advertising: artworks for posters and postcards, to try and get the audience who are already in the cinema to come to NT Live. They also talk to their theatre audiences via e-mails and through the National's usual marketing channels. At the National Theatre they know who you are; where you live; probably when you were born and what other shows you've been to see. They don't have any of that information for NT Live because it's all done through the cinemas which Keith comments has been challenging. She also observes that good relationships with the cinemas are essential, so that they're marketing NT Live in the way that the National Theatre want.

Indeed Clapp agrees that Cinemas are key to the process. Due to digitisation and the ability to take things off and put them on much more flexibly, it puts a demand on cinemas to understand their audience and engage in a dialogue with them, which the vast majority had never really been required to do before. He thinks that the opera and theatre dimension is probably an additional challenge on top of that because they're attempting to have a dialogue with the audience of that specific content, which they probably don't fully understand. He queries the ability of the majority of exhibitors to be able to differentiate between good and bad opera or theatre and highlights the challenges of presenting things as a package to people. He praises the role of intermediaries like 'more2screen' as he feels that they understand the content in a way that arguably most of the exhibitors don't and are therefore able to articulate it and advise on marketing approaches to customers. Brand value is another key marketing tool flagged by Clapp. People know that when they go to the National Theatre or Royal Opera House the performance will be a 'quality performance', there is an element of risk, but in terms of the quality performance, the quality of costume and production values, audiences know what to expect.

Kiedaisch said that when AAM are thinking of doing event cinema, what he's looking for is something that has an existing fan base, because they're only able to screen the event for one night only, so there's a finite limit as to how much money can be made and therefore spent, "I can't spend that much marketing". So content must have pre-existing fans, an unknown band is just like an unknown film. If an independent film company has unknown

actors, an unknown director, etc. it takes a lot more awareness-creation, marketing and PR.

Whilst Binns initially found that the Opera crowd wanted to be treated differently to the cinema crowd she sees the lines as far more blurred now. Whilst she acknowledges that alternative content (or Event Cinema) is bringing new audiences into cinema she also thinks that audiences which traditionally went to the cinema are now much more open-minded about what they see. She comments that audiences go to see things at the cinema because they like a type of music or theatre piece or someone who's in it who's well known, not because they like 'alternative content'.

### **How do Theatre and Opera in Cinemas increase revenue?**

The first year of NT Live was funded by the Arts Council and by Nesta and the first week was sponsored by Travelex. Other sponsors have been secured but they don't currently have a sponsor on board. The aim with NT Live was for it to be covering its own costs within three years of the launch. They actually did it in about 2.5 years but Keith thinks the reason they were able to do that was because the National is such a large organisation, it was able to absorb quite a lot of the initial start-up costs and they had existing staff. It cost about £250,000-£300,000 per broadcast for all the equipment, marketing, satellite time and the people to make it all happen. That is a significant outlay and so they started off doing fewer broadcasts, trying to pick programming that they thought would perform well commercially. Having Actors in the royalty pool was a new element to financial management, although for the first 12 to 18 months they didn't have to pay royalties out, though they now do for most shows. The National did have existing models of royalty payment which were already in place but there were new elements to manage. They don't sell the tickets themselves (as they would do for theatre productions) and so receiving and processing information on sales etc. has a slower turnaround. However, ultimately the National is not for profit so the overall aim is always just to break even. Any money that they do retain from NT Live is ploughed back into either NT Live or the rest of their work so as long as they're commercially sustaining themselves and sustaining the staff that are required to make it happen, any extra money is really a bonus to be able to help create future work.

Clapp suggests that with content like Opera and Theatre, they are presumably dealing with the slightly more affluent side of the older audience, which should allow screen advertising agents to lever in a wider variety of different brands than they're able to for the "standard" cinema audience. He also notes that Theatre and Opera screenings allow Cinemas to charge an uplift in terms of the standard cinema ticket prices. He feels there are a range of other ancillary benefits around this type of audience, including the increased consumption of wine at 'Event Cinema' as compared to "standard" cinema.

Binns echoes Clapp's comments that yes "we're all sloshing around in a lot more wine than we used to" and that the opera crowd tend to buy more expensive wine and provide increased additional spend on food and drink. However, she more importantly identifies Picturehouse's potential to increase revenues as both an exhibitor and distributor of alternative content, as a growing market.

### **What can Filmmakers learn from Theatre and Opera?**

We could re-visit self-distribution. In the UK, Keith detailed how the National self-distributes its content – with all the multiplex chains (inc. Odeon, Vue, Cineworld, Empire and Showcase).

We could place less focus on traditional cinemas. NT Live's distribution network reaches every possible screen from Everyman and Curzon chains through to a Village Hall in Tideswell. Anything that could be considered a theatre or has a suitable space becomes 'a cinema'. This is supported through Picturehouse.

We could seek out a British film champion. Is there a dominant British film brand, equivalent to the National Theatre or Royal Opera House which could push forward British Film content? Clapp thinks that alternative content is currently seen as of insufficient interest to the studios to get involved and doesn't think therefore that places like Pinewood, which rely on studios for the vast majority of their income, would necessarily see it as an area to get involved in. He suggests that perhaps certain factions within the BFI might actually see alternative content as a direct threat to film.

We could re-think the release model (again). Binns thinks it's much more about a one-off event, so film makers who used to think "my goal is to have the film in 60 cinemas for two weeks or shows", should now be looking at how they can maximise their film. This might be by screening their film on one day across 200 cinemas. "It's about people thinking differently... the lines are all being blurred between what's theatre, what's film, what's performance, what's event, what's music. I don't think it's as clear as it was ten years ago, five years ago even and it's more about something on screen in a cinema that people want to see. "

**d. Here is the checklist applied to Theatre in Cinemas, drawing from NT Live.**

	Item	Theatre
1	Intensive Marketing	Distinctive brand connected to, but a distinct from the National. Able to grow international following. Online marketing toolkits. Cinema trailer.
2	A-List Stars	Helen Mirren and Dominic Cooper in phadre. William Shakespeare and Ted Hughes.
3	Own funding	Attractive for a sponsor: large audience base/global reach. e.g. Aviva. Collaborate: e.g. Donmar Warehouse/Théâtre de Complicité.
4	Ability to deliver the product	Phèdre: Jean Racine: version by Ted Hughes. Director Nicholas Hytner. All's Well that Ends well: William Shakespeare. Director Marianne Elliott.
5	Unique story line	The four-show pilot season launched with Phèdre. On 25 June 2009, All's Well That Ends Well, Nation and The Habit of Art.
6	Tie-in	Use existing theatre content and offer it complete and ready to watch.
7	Specialist audience segment	A bigger, more geographically diverse audience for the show: but still a core theatre audience. 77% had visited the cinema in the last 12 months
8	Popular Genre	UK known for its excellence in theatre and NT Live used 'Live from London' hook as a way of building interest and awareness in the programme.
9	Day and Date open	Simultaneous transmission PLUS four-week window for the NT Live recording.
10	TV rights	Upfront fee for work incurred (2 camera rehearsals) plus profit-share framework for royalty distribution should the project become commercial.
11	Digital download	Where possible, an online trailer.
12	Seasonal positioning	Presented in seasons, create a sense of momentum and build a loyal audience. Steer away from competitive weekends. Thursday nights chosen.
13	Professional reviews	Press activity and a limited use of media advertising in key territories completes the marketing mix.
14	Amateur reviews	An e-subscriber list has been promoted on the website and social media outlets, particularly Facebook and Twitter, have been used.
15	Ticket price increase	Internationally, twice the price of a cinema ticket. Price guide of up to £15 in second season.
16	Vertical integration	Broadcasts produced in-house, integrated into theatre production process, collaboration between the Camera/Stage Directors & creative team.
17	Increase spend food/drink	Not centrally identified, but anecdotally from individual cinemas.
18	Affluent audiences	25% of cinema goers earned under £20,000 pa and those earning under £50,000 pa was 50% smaller than theatre.
19	Create an event	84% of audiences 'felt real excitement' because they knew it was taking place live PLUS non-live, also had live presentation introductions.
20	Screen at entertainment centre	High level of cross-over between art house cinema audience and the audience for theatre.



**e Here is the checklist applied to Opera in Cinemas, drawing from ROH Live.**

	Item	Theatre
1	Intensive Marketing	ROH press and Digital Teams.
2	A-List Stars	Giselle starring Marianela Nuñez and Rupert Pennefather. Macbeth starring Simon Keenlyside and Liudmyla Monastyrka.
3	Own funding	Sponsors e.g. Bank of America Merrill Lynch.
4	Ability to deliver the product	Met (also Opera) first into Market.
5	Unique story line	Compared to Hollywood films – yes.
6	Tie-in	Ballet, Operas and pre-existing classics.
7	Specialist audience segment	2013 400 cinemas in 15 countries. Released <i>Carmen in 3D</i> to 1,500 cinemas worldwide. Largest distribution of an event ever.
8	Popular Genre	Not traditionally for cinema.
9	Day and Date open	Live relays and window for recordings.
10	TV rights	4.5million people watched <i>Maestro at the Opera</i> (TV series). Subscription TV Mezzo. ROH/BBC back catalogue Sky Arts 2.
11	Digital download	Free multimedia content on opera, music, ballet and dance. downloadable educational material on iTunesU. Les Troyens was relay on The Space.
12	Seasonal positioning	Christmas 2010: Peter Wright's production of <i>The Nutcracker</i> shown in cinemas in six continents and sold over 17,000 tickets.
13	Professional reviews	Main operas always reviewed in mainstream media
14	Amateur reviews	Extensive engagement via social media with the Royal Opera House having over 72,500 Facebook 'likes' and over 48,400 Twitter followers.
15	Ticket price increase	£15 average.
16	Vertical integration	Bringing work directly into as many homes as possible through Opus Arte, the Royal Opera House-owned DVD label and distribution company.
17	Increase spend food/drink	Anecdotal – wine etc.
18	Affluent audiences	Even older and just as affluent as the core Opera/Ballet audiences.
19	Create an event	Live screening of <i>La Fille mal gardée</i> : Fifth highest grossing film in the UK on its evening and the tenth that week.
20	Screen at entertainment centre	Screening wide at Odeons and Vues etc as well as Art House. Broadcast live to over 200 cinemas across the UK, USA, Europe and Russia.

## 6. Limitations

Whilst multiple avenues for further research were explored in researching this paper, conclusions have been limited to the checklist framework identified in the analysis above. Areas which have not been elaborated upon, but which might provide future opportunities for research include:

The definition of what is regarded as 'British Film'. The BFI recognises a UK film as one which is certified as such by the UK Secretary of State for Culture, Media and Sport under Schedule 1 of the Films Act 1985, via the Cultural Test, under one of the UK's bilateral co-production agreements or the European Convention on Cinematographic Co-production, or a film which has not applied for certification but which is obviously British on the basis of its content, producers, finance and talent. However this includes major studio-backed films, which are primarily funded from the U.S. - as officially certified as British.

Both case studies threw up issues around new careers paths and the need for specialist training in Event Cinema production, distribution and exhibition. There are not yet enough appropriately-trained or relevantly-experienced Producers, Camera Operators, Lighting technicians, Vision Mixers, specialist distributors or marketeers. There are a core pool of specialists in this niche area and there are no specialist training courses currently available in this area.

The impact of home cinema. There is potential to explore the impact that Sky, Netflix and other home movie options have had on British film. This issue does impact on the findings of this paper, but detailed analysis requires a far more complex and long-term study.

Financial Viability. Whilst opportunities to increase revenue to both Cinemas and Content producers has been touched upon, this paper will not provide a detailed financial analysis of this, only the most basic overview.

Alternative Content versus Event Cinema. There is a background debate about what this content should be called and whilst it is understood why each relative party prefers each term, the name in itself is not something explicitly addressed here.

As the author is not a specialist in Alternative Content or Event Cinema and therefore has no direct involvement in the practical application of the methods discussed in this paper, the content is positioned from that of an outsider observing from a non-practitioner view.

Entrenched agendas. All key contributors have their own inherent biases and personal and professional agendas. The responses collated from the four interviews offer just a sample of the viewpoints of three influential individuals in relation to two specific case studies. Having used these samples to extrapolate generic propositions is a simplistic approach and designed to provide a starting point for practical piloting of propositions.

As an Independent British Filmmaker and educator the author is inherently biased. The intention is to identify lessons that might best impact on increasing the success of Independent British Film in British Cinemas.

## 7. Conclusions

In order to improve Box Office sales and compete with increasingly popular Theatre and Opera screenings, British Film needs to identify its own champion organisation to host a slate of productions that will...

- Focus on **Marketing**, which has been core to the success of the National Theatre and the Royal Opera House. They both have a pre-existing brand that is recognised worldwide as something of quality and value. British Filmmakers need to identify such a brand to attach themselves to. Possible examples referenced in this paper include; Pinewood and BFI.
- Cast **A-List stars**, as The National did when they launched with Helen Mirren and both case studies predominately screen 'well-known' performers. However, substituting well-known work or Directors is also an option.
- Secure **funding** to develop a slate and maintain control over how the product is produced and distributed. Our case studies both required significant amounts of public funding to subsidise and manage the 'risk'. A significant amount of public

funds should be set aside to pilot a similar process for British Film. However, private commercial sponsors must also be secured, ideally from outside the film world.

- The identified organisation needs **to evidence their ability to deliver the product**. They have to have produced and distributed a range of artistic pieces to a high level, that is publicly respected.
- A **unique story line** is essential for each film, as far away from Hollywood models as possible. The unexpected, the alternative or something that draws from our artistic, cultural or film heritage is preferable.
- Both case studies only screen work that is from **another medium**. This organisation will need to look at popular works in other mediums from sport to song and create tie-ins where possible. Blur the boundaries between artforms and be open to playing with what 'film' is.
- Ensure each film has a **loyal and identifiable specialist audience segment** from which you can access the fanbase and guarantee loyalty. Pre-existing data on this audience and their exclusive involvement in piloting is essential.
- Somewhat in contradiction, the **genre** itself of the films on the slate should be populist. Comedy, horror, romance, family are more accessible than 'drama'. There is scope for the genre to become the brand - like Hammer Horror or Ealing Comedies.
- Explore a **day and date open** where you reduce costs of production by only negotiating UK Cinema rights and invest more funds into building up a sense of event around the open. Release wide for a short period and keep just a small window for encores. Centrally manage releases with trusted alternative distributors.
- Once a model has proved successful **TV** rights can be sold as a package to select broadcasters - to finance the rest of the slate. This will in turn increase marketing reach.

- Ensure you have a wide range of related content available for free **Digital Download**. If rights for the films themselves can't be cleared, produce separate content that enhances the brand of the organisation on widely available platforms like iTunes or youtube. (Note that this free online content and that on other digital platforms must 'enhance' the cinema experience, not detract from or compete with it.).
  
- Select a day for British film, a British orange Wednesday equivalent and use a back catalogue to build the audience. Look at releasing on quiet days or in 'seasons', releasing six branded films one after another or relating content directly to holidays to ensure appropriate **seasonal positioning**.
  
- Establish good relationships with key press and offer previews to ensure **professional reviews** before release in the papers that best target the film's demographic.
  
- Use social media and blogging to encourage **amateur reviews** upon public release and keep momentum going to encourage encores.
  
- **Increase the ticket price**, position the films above the going cinema ticket price to differentiate, justified by the limited opportunity to view.
  
- Keep control of the brand via **vertical integration**, from script to screen, maintaining as much ownership of rights to the content as possible. Appoint an 'in-house' producer and ensure all elements of production are on the payroll. You may change the 'talent' but it's essential the core production team and creatives from plasterer to costume designer operate under the old studio model. Everyone works on one slate of productions for fixed fees/salary.
  
- Distribute centrally where possible, definitely in the UK and partner carefully elsewhere.

- Investigate non-traditional high profit margin branded refreshments that might be sold alongside screenings to generate revenue for both exhibitors and the organisation. Seek to increase spend on high quality **food and drink**.
  
- Filmmakers need to move away from the youth market and look at families and older more **affluent audiences** until the brand is built.
  
- A sense of **event** needs to be created. A live element is essential, the audience wants a unique experience that can't be directly repeated. Live music, Q&A, guest speaker, live introduction, dressing up etc.
  
- Focus on **non-traditional spaces** and encourage cinemas to view themselves as entertainment centres. The venue must reflect the content, especially when there is an increasing amount of content competing to fill a limited number of screens.
  
- Recognise Event Cinema as **Specialised Cinema**. Cinemas need to show live events etc. to gain revenue but Event Cinema programming currently falls outside of the remit of public funders like the BFI.

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