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Barbican Centre Board	21 March 2018
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Report of: Director of Arts Report Author: Robert Rider, Head of Cinema	For Discussion

Summary

This report provides an update and overview of the Cinema department's current programming and strategy, in the context of the Centre's vision, mission and Strategic Objectives.

The Centre's Strategic Objectives provide the basis and framework within which the Cinema department operates, and enable it to contribute to cross art-form initiatives in our on-site venues, as well as part of the Culture Mile and off-site projects.

Section 1 of the report examines current internal developments, including our strategy around film new releases and our arts projects programmes; our work with the Creative Learning department with families and young people, our off-site activity and work with the Guildhall School; and the overriding focus on equality and inclusion.

Section 2 examines external issues; there have been major developments in the UK film industry exhibition sector over the past year; these are summarised with a particular emphasis on those which have implications for Barbican Cinema, and the challenges and opportunities that these developments provide.

Section 3 provides an overview of our programming in 2017, the Barbican's year of 'Film in Focus'. This was a series of world-class arts and learning projects, commissions and events that celebrated the medium of film across all art forms; it provided the Cinema department with the opportunity to present an ambitious and innovative arts programme, which was highlighted by the 'What London Watches' film project. Section 3 also examines our Press, Marketing and Technical achievements in 2017.

Our programme planning for 2018-19 is presented in Section 4, which revolves around the Centre-wide theme, 'The Art of Change'.

Throughout the year we have continued to develop our mixed economy – box office income from both new release films and curated arts projects, screen advertising, fundraising and entrepreneurial activity, as well as support-in-kind from a large number of industry and cultural partnerships.

The report is divided as follows:

1. Internal Context and Strategy
2. External Context - State of the Cinema Industry
3. Overview and Highlights of 2017/18

4. Programme Planning for 2018/19
5. Marketing and Press
6. Technical
7. Challenges and Opportunities
8. Conclusion
 - Appendix I – Cinema Financial Summary 2017/18 (non-public)
 - Appendix II – Financial Summary: 2016/17 and 2017/18 Comparison (non-public)
 - Appendix III – Top Ten New Releases 2017/18 (1 April '17–31 Jan '18)

Recommendation

Members are asked to note the report.

Main Report

1. INTERNAL CONTEXT AND STRATEGY

- 1.1 The Barbican's Vision is 'Arts without Boundaries' and our mission is to be a 'world-class centre for arts and learning'. Within these over-arching objectives Cinema's messaging remains a commitment to provide 'The best international new releases, talks with filmmakers, major curated seasons and to lead in the presentation of the performing arts on screen'.
- 1.2 We invest in the artists of today and tomorrow, creating a platform for independent directors and filmmakers, and work with a variety of international film festivals and arts partners.
- 1.3 Working with the Creative Learning team we showcase the work of young programmers and filmmakers and collaborate with students at the Guildhall School of Music & Drama.
- 1.4 Through our activities we hope to inspire more people to discover and love the arts. We programme free off-site events in east London, offer reduced price tickets to 16-25 year olds through the Young Barbican membership scheme and offer special student ticket prices.
- 1.5 We have welcomed families for over 30 years to Framed, our Saturday morning film club, and present regular Parent & Baby screenings of the best new release titles.
- 1.6 Equality and Inclusion - in line with Centre-wide objectives, equality and inclusion form a central core of all our programming and activity.
 - We continue to deliver programming that provides positive representations of women, gay and trans people, and that engages with as many nations and cultural groups as possible.
 - We work with a large number of partner organisations that extend our audience reach, broaden and enrich the tone of the programme, and improve diversity both on screen and in the curatorial voice.
 - For our major 2017 project What London Watches, we appointed an Advisory Panel of film specialists that reflected the breadth of London's diverse communities and minority groups.

- We continue to operate the 'F' rating classification system, which provides audiences with a basic awareness of the degree of female participation (women directors, actors and production crew) in any film.
- Our 'Relaxed Screenings' (specially tailored for audiences who may be on the autistic spectrum, have Tourette Syndrome, anxiety, sensory difficulties or other learning impairments) are a regular and ongoing feature of our programme.

1.7 Restructuring our unique offer - in our crossover strategy between New Releases and Arts Projects, Barbican Cinema is unique; no other London cinema offers this balance between the arts and mainstream programming on a similar scale. However, in an effort to match programming ambition with both staff resource and financial resource, the decision was taken this year to reduce the scale of our Arts Projects offer, and concomitantly increase our New Release programme. Arts Projects for the financial year 2018-19 will be reduced to approximately 298 performances, which represents 10% of our total programming activity. This is down from the 387 performances (13% of activity) of 2017/18. This change will not affect the public perception of our unique offer cited above, but will enable the cinema team to adjust its workload in line with the resources available.

1.8 ***Programming strategy - New Releases***

- Art and Commercial balance - in our new release programming we strike a balance between art film and commercial cinema. We offer audiences a wide breadth of films from mainstream blockbuster titles, to smaller independent and world cinema films that have a more niche appeal.
- Cross-arts programming - we continuously look for opportunities to bring our core Cross Arts strategy to the New Release programme with films that connect with the programmes being offered by the Music, Theatre, Visual Arts and Creative Learning teams, as well as other areas that are key to the Centre's profile and offer – architecture, history and design.

1.9 ***Programming strategy - Arts Projects***

- Arts Projects is the generic term we use internally for all of our non-new release programming. This includes the wide variety of film seasons, festivals, repertory programmes, talks, discussions and special events that are curated and co-ordinated by the Cinema Department team.
- These projects provide the opportunity to provide world class programming and are unique presentations. Unlike new releases which may be showing at many cinemas across London and the UK, our arts projects are one-off events that take place at the Barbican alone. They add to the richness and diversity of the cinema offer, distinguish us from other venues, and give us the opportunity to reach niche target groups - more specialist cinephile audiences (for our repertory and archive screenings); music, theatre and visual arts audiences (for our cross-arts programming); families and children (for our young people's work with Creative Learning); and specialist groups for individual projects (such as Architecture on Film or the London International Animation Festival).
- At the core of our Arts Projects programming strategy is the work we produce to complement the programming of the Music, Theatre and Visual

Arts and BIE departments. Cinema is privileged to be one of the key elements in driving cross-arts programming at the Centre, as it has the flexibility to provide programmes that can complement and illuminate work in all other arts forms.

- A number of Art Projects events have been part of our programme for several years, but each is regularly monitored and assessed (in terms of its artistic merit, its costs and its box office contribution) to ensure that it remains viable and of interest and value to our different audience groups. Some of our 2017 projects were not as successful as we had planned (eg. the Cinema Matters series over the summer months, our Dance Umbrella season and the Green Film Festival), and as a result some projects are dropped (eg. the Green Film Festival) and new projects introduced. Our Arts Projects programme is not static, but is continually adjusted and tweaked to ensure maximum audience admissions and income.
- Accessibility - we also maintain a balance between accessible and more demanding programming. Our seasons are meticulously researched in order to deliver world class programming, and strong thematic strands run through all of our artsprogrammes. At the same time we ensure that our offer is accessible to the widest possible audience.
- We receive external programming proposals every week, and each is examined and assessed, in discussions between our curatorial and marketing teams, for its potential viability, its fit with the Barbican Cinema brand, its financial and funding underpinning, and the level of staff resource that it would require. The vast majority of these proposals are rejected on the basis of not meeting the criteria cited above.
- We continually look for new avenues to increase audiences and income through our Arts Projects programming. This often involves using screening slots in the cinemas when they are not otherwise being used. In 2017, in response to a Board suggestion, we launched **Afternoon Arts**, a new matinee slot consisting of filmed Theatre performances and Gallery shows, and targeted at older audience members who are free during the day-time. To date, these afternoon screenings have attracted an average audience of 76 per screening, and have contributed an additional £7.5k to our income targets.

2. EXTERNAL CONTEXT - STATE OF THE CINEMA INDUSTRY

2017 has seen a number of significant changes in the UK film industry, many of which have implications or repercussions for cinema operation at the Barbican.

2.1 Cinema box office in UK and Ireland had a record-breaking year

In 2017, £1.38bn was spent on UK cinema tickets, 6.1% up on 2016. Films such as Dunkirk, La La Land, Paddington 2 and the December release of Star Wars: The Last Jedi contributed to the total revenue. Despite the growth of home entertainment streaming and online services, it is clear that audiences still enjoy the cinema - with the big screen, quality sound, comfortable seats and the collective experience. However, of the 900 films released in the UK and Ireland in 2017, the top 10 films (listed below) accounted for approximately 33% of total box office income - the sector is

thus still considered by many observers as an industry somewhat out of kilter:

1. Star Wars: The Last Jedi:	£73.1m
2. Beauty And The Beast:	£72.4m
3. Dunkirk:	£56.6m
4. Despicable Me 3:	£47.8m
5. Guardians Of The Galaxy Vol 2:	£41.0m
6. Paddington 2:	£39.3m
7. It:	£32.3m
8. Thor: Ragnarok:	£31.0m
9. Spider-Man: Homecoming:	£30.4m
10. La La Land:	£30.4m

2.2 BFI plan for a National Centre for Film, TV and Moving Image

In January 2018 it was announced that the BFI's long cherished £130m plan for a National Film Centre had been abandoned. The project (which consisted of a national centre with three screens, a cutting-edge film education and research hub, and a gallery space) had been in gestation in one form or another for twenty years. The decision to abandon the project is a major blow to the BFI, which only last year announced that the plans were on track, with two-thirds of the £130m budget already in place from Bangkok-based property and hospitality company Pace Development Corp.

According to Variety magazine, the decision was "a victim of uncertain political and economic times in the face of Brexit" (Variety 03/01/2018). The German architect Ole Scheeren, a former colleague of Rem Koolhaas and renowned for the China Central Television headquarters in Beijing, had been appointed to design his first building in the UK.

2.3 BFI new regional funding strategy

In January the BFI announced a new strategy for its regional funding, including London. A re-shaped Film Audience Network (FAN) will continue at the heart of its strategy, using Lottery Funding of £4m to increase audiences for film in England via six geographically re-structured regional hubs (Scotland, Wales and Northern Ireland have their own hubs). The geographical changes bring the hubs into line with the same boundaries as those of Arts Council England.

The changes attempt to ensure that the six FAN funding bodies work more closely with cinemas, festivals, film clubs, schools and cultural organizations to build audiences and connect more people across the UK with film and other aspects of the moving image.

2.4 London Living Wage – staff at 5 Picturehouse cinemas in London in 2016 demanded to be paid the London Living Wage, but this was refused by the Picturehouse management. In 2017 strike action took place on various occasions (including the London Film Festival) at the Ritzy Brixton, together with the Hackney, Crouch End, East Dulwich and Picturehouse Central cinemas. The staff campaign was supported by the British Film Institute and

a number of high-profile figures including Sir Ian McKellen and Ken Loach. They were among 25 actors and screenwriters who urged the public to boycott Picturehouse cinemas and their parent company Cineworld. As at February 2018 the issue is still not resolved.

2.5 *Brexit*

- **Economic uncertainty** - the jury is still out on the implications of Brexit for the film sector, but the majority of industry leaders forecast negative results. If the effect of a 'hard Brexit' is a decline in sterling and a period of economic uncertainty, it may dampen demand in all leisure and cultural sectors, including cinema attendance. Also a recession following Brexit may mean that the generous tax breaks that filmmakers can currently obtain for producing their films in the UK, may not survive in a climate where people will want to see money going to the health service and public services.
- **Freedom of movement** - industry observers have also expressed concern about the possible loss of freedom of movement, and thereby a loss of input of skilled European talent into UK productions. This is especially problematic for visual effects companies such as Double Negative and Framestore (which contributed to BIE's Into the Unknown and Digital Revolution exhibitions), who are two of the world's leading visual effects companies and need skilled and creative artists, many of whom currently come from other European countries.
- **European funding** - many films and TV productions receive funding from European bodies, and Brexit may result in the loss of this financial support. There could also be an erosion of the UK skills base from the loss of European funding for training. For the Barbican there could be direct implications for ourselves as members of Europa Cinemas. We have received small awards related to the number of European films we show each year, and we may no longer be eligible after Brexit.

2.6 *Weinstein fall-out and a rapidly evolving landscape*

The Harvey Weinstein case and other sex abuse allegations have represented one of the biggest film-related public issues of recent years, and have reinforced negative perceptions of the film production sector. It is yet to be seen whether the bankruptcy of the Weinstein operation and the associated major reputational damage will have a wider effect on the economics of the film industry.

2.7 *Performance Cinema*

The live streaming of opera, theatre and other arts (generally known as 'Event Cinema' in the industry) is now seen as heading towards a saturation point in the UK. The medium grew 6% in 2017, which was a significant decline in its growth from previous years (2015 for example saw a 35% increase on the previous year). Only one release from 2017 (Andre Rieu's latest concert) broke into the all-time top 10 record for event cinema releases, and this was less than half of the record-setting totals from the NT Live Hamlet (the Barbican Theatre production featuring Benedict Cumberbatch) and War Horse releases in previous years. Event cinema

distributors are now looking towards 'alternative content' such as boxing, pop music concerts and gaming to expand the offer.

2.8 Cinema Pricing and new pricing models

A variety of new pricing models are being investigated and researched by cinema operators in both the UK and further afield and are described below. We continue to keep abreast of all developments in this area throughout the industry, and will look to incorporate any appropriate systems into our Barbican pricing structure – a feature that will be more feasible with the introduction of our new ticketing system.

- **Standard cinema prices** - tickets at some of London's 'boutique' cinemas are now in the range of £16-£20, with some industry commentators arguing that excessively high prices may threaten the future of the sector. In February 2018, standard ticket prices at London's most expensive venues were: Electric Portobello: £20 / Picturehouse Central: £16:50 / Everyman Hampstead: £16:50 / Curzon Mayfair: £16:00

- **Multiplex limitless attendance schemes** – two UK multiplex chains now offer loyalty / subscription cards providing limitless cinema attendance. With both schemes audiences can see as many films as they like each month.

The Cineworld 'Unlimited' card costs £20.40 per month for its London cinemas on a 12-month subscription, whilst the equivalent Odeon 'Limitless' card can be bought for £19.99 per month on a similar 12-month subscription.

Both Cineworld and Odeon also offer discounts for online booking (in contrast to the Barbican charging an online booking fee), whilst Vue, the third major multiplex operator, has entered into a relationship with Nectar (audiences can pay for their cinema ticket in exchange for Nectar points) as well as offering discounts to members of the armed forces.

- **Demand-based ticket pricing** - multiplex cinema operators in the US are exploring technology-based pricing models similar to Uber (where cab prices go up in periods of high demand). The scheme would lead to higher prices for films in high demand (blockbusters and the January/February awards season releases) and lower prices for smaller films and releases at other times of the year. The aim would be to drive revenue in peak periods, and drive attendance in non-peak periods. The tests are being conducted by Regal, the second largest cinema chain in the US.

The plan would need the agreement of film distributors, who have historically stood against changes to traditional cinema pricing models. For example, in the UK when Stelios Haji-Ioannou of Easyjet bought The Point multiplex in Milton Keynes, and tried to run it as 'EasyCinema' on the Easyjet pricing model, he was forced out of business by UK film distributors who refused to supply him with new films on release.

- **Subscription models / dynamic pricing** - other current strategies being explored to optimise auditorium capacity include subscription models and dynamic pricing systems, which could be based on seasonality / the stage of the film's theatrical life / the time of screening / the location of seat.

2.9 Film Distribution

The UK theatrical marketplace continues to be dominated by a few very large companies. In 2016, the top 10 distributors generated over £1.2 billion in box office revenues, while the remaining 97 distributors made £53 million. The top 10 distributors had a 96% share of the market in 2016; Walt Disney was the highest earning distributor with theatrical revenues of £301 million. The market share for the 97 distributors outside the top 10 was 4%. The highest earning distributor of UK independent films was 20th Century Fox, but StudioCanal distributed the largest number of such films. Almost one in seven films (68%) were released at fewer than 50 sites in 2016.

A central feature of the UK distribution business model is revealed in the fact that in 2017, the opening weekends of new release films represented 30% of their total box office income. The first three days of a film's release determine its future cinema life, as well as its life on other platforms (DVD / VOD / television, etc). A film that does not open well is quickly removed from cinemas. This explains why so many films come and go, and audiences find that if they miss a film in its first week, it is often nowhere to be found until its DVD or VOD release, generally 16 weeks later. There can be few other industries where the life and profitability of a new product is determined by the first three days that it is on sale.

2.10 Film Exhibition

Following last year's sale of the UK's Odeon & UCI cinema circuits to US operator AMC, this year the process was reversed when British film exhibitor Cineworld acquired the second largest US film exhibitor Regal Entertainment for \$3.6 billion. This makes Cineworld the second-largest cinema exhibitor in the world, behind AMC, which is owned by China's Wanda Group. The new Cineworld and Regal entity controls more than 9,500 screens in ten countries. London-based Cineworld was founded in 1995 and is currently the second-largest cinema operator in Europe with 2,227 screens. In contrast, the Wanda buy-out of AMC means that the company owns around 15,000 screens including 3,200 in China, 8,200 in the U.S. and 2,000 in Europe. In essence, this ongoing acquisition process means that more cinema screens are in fewer hands.

As regards film exhibition at a local level, the Curzon and Everyman groups are opening new cinemas in close proximity to the Centre. (see 7.1 below)

3. OVERVIEW AND HIGHLIGHTS OF 2017/18

3.1 2017/18 in numbers:

- Total number of performances: 2,982
- New Release performances: 2,595

- Arts Project performances: 282
- Young People performances: 48
- Relaxed performances: 18
- Screen Talks: 27

- Silent Films with Live Music: 12
- *Parent & Baby performances: 46
- *Access performances: 35
- Total number of Admissions: 177,570
- Number of New Release Admissions: 135,077
- Number of Arts Project Admissions: 42,493

* Included in New Release total above

The above data is based on matured figures as at 16/02/2018 and our year-end projections for 2017-18. Overall they reflect a marked improvement on 2016/17, with an increase in total admissions of 20,000 over the previous year, an increase that is shared 50/50 between New Releases and Arts Projects.

3.2 **New Releases 2017/18**

Our ten most successful new releases in terms of box office income and attendance during 2017-18 (as at period 10, 17/18) were:

Top 10 by income	Total admissions	Net income
Blade Runner 2049 3D	6,233	£57,031.92
Star Wars: Last Jedi 3D	5,528	£51,097.33
Dunkirk	6,757	£50,179.75
Three Billboards...	6,376	£46,883.33
The Death of Stalin	4,550	£34,714.50
The Post	4,131	£30,217.50
Darkest Hour	3,518	£26,785.67
Call Me By Your Name	3,630	£25,923.67
The Handmaiden	3,448	£24,957.04
Baby Driver	3,460	£24,250.33

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Regarding the Top Ten by income list, these ten films delivered 44% of our total new release box office income. To date, 107 new release films have been presented during the current financial year. The remaining 97 new releases provided 56% of income.

3.3 **Arts Projects 2017/18**

2017's Centre-wide theme Film in Focus was a year celebrating the power of the moving image and its influence across the arts, and provided Cinema with the opportunity to present an exceptional year of diverse and ambitious programming. The key Film in Focus projects were: What London Watches: Ten Films that Shook Our World / Sculpture Court Outdoor Cinema / Conversations with Women In Film / Cinema Matters / ScreenTalks Archive / The Craft of Film.

- **What London Watches** – the focal point of Cinema's Film in Focus programme was *What London Watches: Ten Films that Shook Our World*. After the most ambitious outreach project ever undertaken by the Barbican Cinema team – where we asked the population of London to tell us about the film that made a huge impact on their lives and why – we were able to screen the resulting 10 titles, selected by a specially appointed Advisory Panel reflecting the diversity and expertise of the London independent film sector, and included two of the Barbican Young Programmers. This was a significant move forward in broadening out our audience and partner networks. The attendance figures were impressive across the week. Our Marketing team, pulling suggestions from over 400 responses with some truly personal engagement by London film fans, created a striking, audience-focussed marketing campaign advertised across London, with 63% of the audience being new bookers. A particular success was the classic Bollywood film *Sholay*, which was moved from the Beech Street cinemas to Cinema 1 because of its popularity.
- **Sculpture Court Outdoor Cinema** (Aug) - another Film in Focus triumph was our first Outdoor Cinema on the Sculpture Court, which was 100% sold out and a huge hit with Barbican Members and Residents. Complementing BIE's exhibition 'Into the Unknown', three popular sci-fi films were screened over the Bank Holiday weekend - Stanley Kubrick's *2001: A Space Odyssey* (1968), Steven Lisberger's 1982 sci-fi cult classic *Tron* and Alfonso Cuarón's *Gravity* (2013). This tapped into the ever-growing event cinema trend very successfully, generating real excitement via an online marketing campaign. With the weather remaining warm and dry, the Sculpture Court made for a stunning setting. Other off-site work included programmes of short films for families and children which were presented at the Leyton Get Together and Walthamstow Garden Party, both in July.
- **Conversations with Women in Film** - presented in partnership with both the London Film School and the national organization Women in Film and TV, the first event in January saw a sold out screening with director Hope Dickson Leach and a preview of her film *The Levelling*. Later events included conversations with the hugely influential American academic B Ruby Rich, and directors Gurinder Chadha and Clio Bernard. The success of this series has led us to extend the 'Conversations with Women in Film' strand beyond the Film in Focus year.
- **Cinema Matters** – our ambitious repertory series of 24 programmes across the Film in Focus year was divided into 6 themes and examined the impact of cinema on society and the arts, from an historical and contemporary perspective.

- **ScreenTalks Archive** - since the early 1990s, we have recorded our ScreenTalks, and in so doing have built up a formidable collection of interviews with some of the world's leading directors, actors and filmmakers. The early recordings were made on analogue materials (audio CD, VHS tape), although later talks were recorded on DVD or as digital files. For this Film in Focus project, we digitalized some of the most fascinating, entertaining and sometimes provocative discussions. These were released once a month on the Barbican website for our audiences to share during the Film in Focus year. They included talks by Ken Loach, Amma Asante, Terry Gilliam, Joanna Hogg, Ben Wheatley, Carol Morley, Horace Ove, Park Chan-wook, Kasi Lemmons, Asif Kapadia, Robert Altman and Richard Attenborough.
- **The Craft of Film** - our first event of Film in Focus, was a pan-European project working with the London-based Cultural Institutes of ten European countries. It provided a highly successful start to the year, with a programme of talks with filmmakers representing all aspects of the craft of film – from film direction, to cinematography, editing and costume design. Attracting 62% of new bookers, this also appealed greatly to Young Barbican and student filmmakers, suggesting a very positive response to the aim of appealing to young professionals and industry beginners and workers. Highlights were a masterclass with Portuguese director Pedro Costa, and talks with acclaimed German cinematographer Fred Kelemen and leading Romanian actor Ana-maria Marinca.
- **This is Rattle** (Sept) - to complement the celebrations marking the arrival of Sir Simon Rattle as Music Director of the LSO, we programmed a series of films in association with the Music team, including Kenneth Branagh's **Henry V**, **The Making of a Maestro**, a BBC documentary about his career, and the wonderful film **Rhythm Is It!** about the setting up of schools' education work at the Berlin Philharmonic under Simon Rattle's leadership.
- **Silent Film and Live Music** – in partnership with our colleagues in the Music team, we presented one of our most ambitious silent film projects – a presentation at LSO St. Lukes of the remarkable 1929 Russian film **New Babylon**, featuring a world premiere live performance of Shostakovich's lost original piano score by Sasha Grynyuk. This was another sell-out and cross-arts highlight.
Another Silent film highlight was a screening of legendary Japanese director Ozu's masterpiece **I Was Born, But...**(1932) on a 35mm print imported from Tokyo, with live piano accompaniment and a traditional benshi (Japanese storyteller) narration.
- **The Grime and the Glamour** (Sept/Oct) – this programme complemented *Basquiat: Boom for Real*, with a season of films about the seamy, creative underbelly of New York in the 1970s and '80s, and proved popular with cinema and art gallery attenders alike. Avoiding the usual New York clichés helped the season to appeal to our regular, cinephile audience, whilst the cross-arts focus (Visual Arts and Music) helped to carve a niche audience. The opening night event, a series of films about the NY club CBGBs, proved popular enough to attract bookers an entire year before the screening, and warranted a repeat showing - which also sold out.

- **Screen Talks**

We were able to offer our audiences another year of enticing ScreenTalks with leading lights of the film world, often with previews of their new films. Our ScreenTalks provide some of the highest profile events of our film year. Some highlights for 2017/18 were:

- **Who's Gonna Love Me Now** (April) with Julian Clary and the London Gay Men's Chorus - the sold out screening of this documentary was broadcast from Cinema 1 to 40 other cinemas around the UK.
- **I am Not Your Negro** (April) with director Raoul Peck – a special preview screening of his Oscar nominated documentary which explored the history of racism and segregation in the United States, played to a full house.
- **Dario Argento** (Nov) – a rare UK appearance of the legendary Italian genre director, with a screening of the restoration of his 1977 horror film *Suspiria*.
- **Ai WeiWei** (Dec) – for this special appearance by Ai WeiWei and premiere screening of his film *Human Flow*, we knew that the event would be highly popular, and to maximize box office revenues we sought a larger venue than Cinema 1. Fortunately Milton Court was available, and the documentary about the global refugee crises was followed by Ai WeiWei in conversation with broadcaster Jon Snow and other guests. As soon as the Milton Court event sold out, we made arrangements to beam it to Cinema 1, where it also played to a full house. The event was broadcast live to over 150 cinemas in UK and Ireland, spreading the Barbican brand around the country.

- **Young People** - we continue to work with our colleagues in Creative Learning on a range of projects, including **Framed**, our Saturday morning film club for children and families, and the **Framed Film Festival** (Nov). Following last year's concerns that attendance at the 2016 Framed Film Festival had fallen dramatically, we re-structured the Festival and reduced it to a one-day event. The strategy was successful, and all screenings for the 2017 one-day event were sold out shows. The workshop programme, curated by the Creative Learning team, was equally busy, and the whole Beech Street site was throbbing with families and children.

Chronic Youth – our festival for teenagers and young people continues to be curated and produced by the Young Programmers group themselves. The 2017 event was an outstanding success, with an exciting buzz around the Beech Street venue.

- **Other key Arts Projects**

Architecture on Film continues to attract large audiences, and now complements the Architecture on Stage events curated by the Visual Arts team. Both projects are presented in partnership with the Architecture Foundation.

Four major festivals are still a central part of our arts programming offer – the **London Jazz Film Festival** (in collaboration with the Music department and promoter Serious); the **London International Animation Festival**, still well attended and now in its 14th year; the **Human Rights**

Watch Film Festival played to full houses at each of its 13 screenings. The success of this Festival at the Barbican has enabled us to become the leading London venue for the Human Rights Watch Film Festival, and in 2018 we will present 16 screenings, including the opening and closing galas. The **Global Health Film Festival**, our annual two-day event which brings health advocates, film-makers, industry experts, journalists and the public together for global health advocacy, continues to draw practitioners from across the world. Through film, Q&As, workshops and a VR exhibition, the 2017 programme looked into issues surrounding emerging pandemics, world health systems, non-communicable disease, and issues surrounding refugee and migrant health.

In addition to the major film festivals cited above, our rolling Arts Projects programme in 2017 included Science on Screen, Shubbak – A Window on Contemporary Arab Culture, the Doc 'n' Roll music film festival, Underwire Festival, New East Cinema, Fringe Festival, and Hollywood Legends, in which Adrian Wootton, the CEO of Film London, presents a series of talks and screenings for Barbican Members about the lives of some of Hollywood's most illustrious figures. This year's stars to have come under Wootton's microscope have included Humphrey Bogart, Sidney Poitier, Judy Garland and Tony Curtis.

4. PROGRAMME PLANNING FOR 2018/19

4.1 *New Releases 2018/19*

Film distributors generally announce their release dates for new films approximately three months ahead, and thus this report can only provide relatively short-term information on our 2018/19 New Release programme. However in the early part of the new financial year we can confirm new films from Steven Spielberg (Ready, Player One), Wes Anderson (Isle of Dogs) and leading UK director Mike Newell (The Guernsey Literary and Potato Peel Pie Society). Other highlights will include Funny Cow (featuring Maxine Peake), and Lean on Pete from director Andrew Haigh, whose previous film 45 Years (with Charlotte Rampling and Tom Courtenay) was highly popular with Barbican audiences. Mainstream titles will include Jurassic World: Fallen Kingdom, JK Rowling's Fantastic Beasts: The Crimes of Grindelwald, and for those who enjoyed Meryl Streep, Pierce Brosnan and Colin Firth in Mamma Mia, there is the follow up: Mamma Mia – Here We Go Again.

4.2 *Arts Projects 2018/19*

The Centre-wide theme for 2018 is The Art of Change. Our programming across all art forms explores how the arts respond to, reflect and potentially effect change in the social and political landscape. Our key Art of Change film projects are:

- **Nevertheless, She Persisted - Suffrage, Cinema and Beyond (April)**
In 2017, when US Senator Mitch McConnell uttered the phrase "Nevertheless, she persisted" in criticism of Senator Elizabeth Warren, the expression became a rallying cry for feminists around the world. Our major Art of Change season, which celebrates the centenary of the 1918 Representation of the People Act, which gave (some) women the right to

vote in the UK, examines the struggle for women's political voices to be heard, female access to institutions of power, and the quest for equal rights on a global scale.

- **Returning the Colonial Gaze (May)**

This five-part season focuses on the relationship between French and Francophone African cinema, in the period after independence when African filmmakers in the former colonial countries, asserted the right to represent themselves, and reclaimed control of their own images. Their work reversed the Western 'colonial gaze'.

- **Town Bloody Hall (June)**

To complement the theatrical run of *The Town Hall Affair* in Barbican Theatre, we will screen the original *Town Bloody Hall* (1979), the celebrated documentary by Chris Hegedus and D.A. Pennebaker, which records an impassioned and riotous evening of feminist debate with Norman Mailer, Germaine Greer and others in 1970s New York.

Alongside *Town Bloody Hall* we will be presenting a season curated by the New York-based Women's Film Preservation Fund, the only film restoration programme in the world dedicated to preserving the cultural legacy of women in the film industry.

- **Generations: Russian Cinema of Change (Sept)**

This project brings together a selection of Russian and Soviet films, both contemporary and archive, and is presented in partnership with The New Social, a London-based collective which looks across Eastern Europe, the Balkans, Baltic and Russia to uncover how new social, cultural and political identities are being played out on film. Charting periods of profound change across 20th century Russia, the programme leads with films that were once banned for their supposed 'immoral' and 'anti-Soviet' portrayals of a liberated, independent youth.

- **The Television Will be Revolutionised: Channel 4's Film Collectives (Sept)**- a film series focusing on Channel 4's Film Collectives and the impact of the 1982 Workshop Declaration, which revolutionised the British film industry by enabling young filmmakers from diverse backgrounds to enter the sector. The Declaration allowed the work of such groups as Black Audio Film Collective, Amber Films, Ceddo, Red Flannel, Frontroom Productions and the Belfast Film Workshop to be screened on television and in cinemas - avenues that had previously been inaccessible.

- **Human Rights Watch Film Festival (March)**

As part of The Art of Change, we are continuing our longstanding partnership with the Human Rights Watch Film Festival. Bearing witness to human rights violations around the world, the Festival creates a forum for individuals on both sides of the lens to inform audiences of their activities, with the knowledge that personal commitment can make a difference. In addition to the screenings, films are accompanied by a series of screen talks and panel discussions.

For our 2019 theme art and science, Cinema will present a number of projects not yet in the public domain which will be advised of orally at the meeting.

5. MARKETING AND PRESS

5.1 Brand and Benchmarking Research - the reduction in Arts Projects and the shift to increased New Release activity (cited 1.7 above) will have implications for the marketing of the Cinema offer, and in the light of this the Cinema Marketing team has commissioned arts research agency MHM (Morris Hargreaves McIntyre) to conduct a piece of brand and benchmarking work for Barbican Cinema.

- It is at least 5 years since such a large piece of research has been undertaken in respect of Barbican Cinema, hence its significance. The huge expansion of boutique exhibitors in London has changed the marketplace substantially since the Beech Street cinema project was conceived, and therefore an important aspect of this research will be to understand our place in this vastly changed environment.
- The primary purpose of the research is to better understand Barbican Cinema's existing and potential audiences and to gain a direct insight into their priorities and needs.
- We are interested in particular in the behaviour of our visitors in respect of both our New Release and Arts Projects programmes, as well as factors that influence their cinema choice (time, price, location, convenience), their view of our facilities, and their perception of the brand values of Barbican Cinema.
- The methodology includes a quantitative survey (which has achieved 1500 respondents) as well as a qualitative research involving 4 focus groups: attenders, lapsed attenders, Barbican non-Cinema attenders, and non-Barbican attending cultural audiences.
- The research will be complete by late February 2018 with the eagerly-anticipated findings being presented in March. This major work will form the basis for the future Cinema marketing strategy, and will strengthen our position in respect to increased local competition.

5.2 Film in Focus 2017 Marketing – this proved to be an exciting year for the marketing of Barbican Cinema. The volume of projects and appeal to a variety of audiences proved challenging and complex, but for the vast majority of projects, audience targets were met, campaigns created by the Barbican Design Studio were striking and appealing, and marketing techniques proved effective. This experience, combined with the MHM research, will feed into our campaigns for 2018. Film in Focus has provided an overview of our audience tastes and preferences, and driven a wealth of new bookers to convert to more regular attendance. This, combined with the findings from the MHM market research, will prove central to our marketing strategy and our cinema audiences for the future.

5.3 Cinema Press

The cinema press campaign throughout 2017 focussed mostly on **Film in Focus**, including **What London Watches** and the major autumn season **The Grime and Glamour**, as well as other Barbican Cinema curated events. In December our co-presentation of the **Ai Weiwei 'Human Traffic' Live Event** followed by an onstage discussion, which attracted extensive

press coverage. The cinema programme also received some excellent press mentions throughout the year:

- **TimeOut.com** recommends the Barbican Cinema screening of *The Picture of Dorian Gray* (part of the **My Twisted Valentine** film season) and described the line up: *"This year's (film) selection is typically excellent...you know it'll be a good time."* (Feb 17)
- Steve Rose previewed the Barbican's upcoming **The Craft of Film** season in **The Guardian Guide**, calling it a "...refreshing cross-cultural initiative." (Feb 17)
- **SEEN London** ran a preview feature on **B. Ruby Rich's** upcoming summer project at the Barbican Cinema: *"Housed within London's premier cultural centre, Barbican Cinema, in collaboration with Club des Femmes and in association with Birkbeck College, is delighted to announce Being Ruby Rich – a unique series of screenings and events hosted by feminist writer, critic and academic B. Ruby Rich."* (Apr 17)
- **Culture Whisper** recommended **Barbican Cinema** in its run down of the best Unique Cinemas in London: *"The Barbican's brutalist architecture might divide opinion, but its cinema – which often hosts film festivals and plays old classics – is definitely worth a visit."* (May 17)
- A Major feature in **Sight & Sound** discussed the Barbican's Young Programmers and gave extensive mention to our **Chronic Youth Film Festival**, plus interviews with several of the young programmers who took part: *"A recent, exciting example is the Barbican's Chronic Youth festival, which offered a weekend of "bold, brutal and beautiful coming of age films" chosen by a team of actual young people....the Barbican's group of 16 were given six months to curate, market and deliver a film festival at London's Barbican Centre. It's encouraging to see institutions investing in young voices in this way, providing them with the infrastructure, training and support to equip them with the experience needed for programming jobs..."* (Jun 17)

6. TECHNICAL

6.1 Technical upgrades

- In the last year a number of important technical upgrades have been undertaken. A new digital projector has been installed in Cinema 1 (Christie CP4230), and as a result we are now able to offer our audiences a brighter image on screen, with crisper colours as well as 4K resolution for 2D projection and high frame rate content. The new projector can take a 4.5K xenon lamp, which means that we are able to meet the recommended brightness standards for 3D projection set by the Digital Cinema Initiative.
- The Cinema 1 screen, masking and masking controls have been replaced, which also contribute to a much improved viewing experience for our audiences. Health and Safety works were also undertaken, including an added high level walkway behind the screen, meaning that Barbican staff can carry out maintenance work without risk in the process.

6.2 Technical Challenges

- With rapidly advancing technology, we are faced with a number of potential challenges, which we will continue to monitor to ensure that we do not fall

behind the competition. These include the brightness levels of the projectors in the Beech Street cinemas, and our four 35mm projectors, for which spare parts are not always available. A similar issue arises with our sound processors, which are outdated and the equipment is no longer supported by the Dolby supplier. Our skilled projectionists will continue to maintain the equipment and monitor technical developments and alternatives.

6.3 New Technical Developments:

- There are new opportunities to enhance the quality of technical presentation in both projection and sound. Laser projectors are rapidly taking over from standard digital projectors (Christie, which through our Development team has supported the Barbican with screens and foyer projection equipment, as well as the magnificent 'Welcome' screen at the Silk Street entrance, leads the way in laser projector research). As regards sound quality, some cinemas now offer their audiences 7.1 and 'immersive' sound, rather than the 5.1 system that we have in place. Again our technical team will continue to monitor the market to ensure that the quality of presentation at the Barbican cinemas continues to meet our audience expectations.

7. CHALLENGES AND OPPORTUNITIES

7.1 Challenges - New local competition

- **New local competition** - in January 2017 the Curzon cinema group opened a new 4-screen venue at Aldgate, and in November the Everyman circuit opened a 3-screen cinema at Kings Cross, adjacent to the Central Saint Martins art school and the Guardian newspaper building. Both cinemas are within our audience catchment area, but closer still will be a new 3-screen cinema which Curzon will open in 2018 in Pitfield Street, a few hundred metres east of Old Street roundabout. This will be the closest competition that Barbican Cinema has encountered since the Centre opened in 1982.
- Whilst Curzon does not provide the world class arts programming (consisting of curated film seasons, festivals and special events) that has made Barbican Cinema distinctive, it is renowned for high quality new release programming, and, being in such close proximity, could pose a risk to our level of admissions and box office income. This will suggest a renewed focus on the local audience (including Barbican residents and City workers) which our marketing team is currently addressing.

7.2 Opportunities - day-time / alternative use of cinemas and entrepreneurial activity - we continue to explore many avenues to maximise potential income from the cinemas when they are not otherwise being used for public film screenings. Current initiatives include:

- **Parent and Baby screenings** – our current offer to new parents and their babies consists of a weekly screening on Monday mornings. The success of these events has prompted us to consider extending the P&B screenings to Saturday mornings, when parents could attend together and with friends. These screenings would run alongside our children's Framed Film Club events, and the additional cost of running a separate film, when

projectionist, box office and audience experience staff are already on site, is marginal.

- **Schools' Screenings** – the organisers of the Global Health Film Festival have indicated their desire to offer schools' screenings as part of their festival. We are in discussion with our Creative Learning colleagues on the feasibility of schools' screenings, and if the Global Health plan goes ahead, it could form a template for similar initiatives by other festivals that we host, as well as our own curated seasons. Such screenings would increase our profile amongst young people, and would meet our CL lifelong learning Barbican objectives. The average ticket yield for schools' screenings is lower than standard film screenings, but nevertheless generates welcome additional income with the right financial model.
- **Sculpture Court screenings** – the huge success of last summer's outdoor screenings present the opportunity to contribute to Culture Mile programming, and to repeat the project if the financial model is viable. Our first Sculpture Court project last summer proved very heavy in terms of both staff and financial resources. The hire of the screen, DCP player and digital projector was approximately £10k, and it is difficult to recoup this sum for a 3-day event through ticket sales alone. One possibility would be to stage a 5-day event (thus reducing expenditure per screening) or to locate funding and/or sponsorship opportunities. Indeed, our Development team is in conversation with a high profile brand on this very issue at the current time. The project enables creative and public use of this 'hidden' venue, part and parcel of the Barbican Centre and a real attraction to the public who are keen to experience the space in versatile ways.
- **Long format television drama on the big screen** – we continue to explore the possibility of presenting long-format television series in the cinemas on the big screen, as proposed at last year's Board meeting. Games of Thrones, The Walking Dead and Dexter (to name but a few) continue to attract vast audience numbers, and binge viewing is still a cultural phenomenon. However although our approaches to the producers (Amazon Prime and Netflix) have not been successful, we will continue to explore the possibility with new contacts at both studios.
- **UK Touring Seasons** – we are exploring the possibility of touring our own curated film seasons to other cinemas around the UK. This would be an income generator and would increase the profile of Barbican Cinema at a national level - our name and curatorial skills would be recognised by cinema attenders around the UK. Seasons such as the Basquiat-inspired 'Grime and the Glamour' which was a huge success and touched a specific zeitgeist at a particular cultural moment, would be highly desired at some of the leading independent and specialist cinemas. We are currently launching a partnership with the highly regarded Sheffield Doc/Fest's 'Alternate Realities' touring programme with a view to developing a co-commissioned touring programme. Such a season would also be in high demand amongst UK independent cinema programmers. We would work with Finance department colleagues to ensure that the business model is both feasible and sound, and discuss funding opportunities with Film London and the BFI.
- **Film Poster exhibition and sale, in tandem with our curated seasons.** For 5 years the Film4 Summer Screen programme at Somerset House has

been complemented by an exhibition of silk screen prints organised by Dalston-based Print Club London. The original, limited edition posters are inspired by the films in the season, and are produced by a range of local artists. The posters sell for £60, and Somerset House on the night of the private view is the only place to be for hip, culturally conscious Londoners. Long queues meander the four sides of the Somerset House courtyard. With our Retail Team, we could look at initiating discussions with Print Club London to explore the possibility of a similar venture around some of our self-curated seasons.

8. CONCLUSION

- Artistically, it has been a strong year for Barbican Cinema and Arts Projects programming has continuously performed well against financial targets. Our programming drive (for both New Releases and Arts Projects) stems from the Centre's vision, mission and strategic plan, and this has established a profile for the cinema operation that our research suggests is being increasingly recognised by our audiences. The Centre's strategic plan enables our programming to be bold, adventurous and engaging, and at the same time provocative, intellectual, and transformative.
- This will be the last Board Report of which I shall have the privilege to be the author. My motivation has been, and continues to be, the desire to reveal to audiences the value of cinema today. Cinema can be the temple of dreams, providing pleasure, entertainment and distraction; concomitantly it can be the fount of knowledge, reflecting many facets of the world, helping us to know more of other people's societies and cultures.
- Indeed, our relationship with cinema is multi-faceted. It is at once emotional (we are part of an audience undergoing a collective experience), intellectual (a space for contemplation, inspiration and debate) and commercial (we buy a ticket in a *cash nexus* relationship of monetary exchange).
- At a macro level cinema is a cultural and community asset, and a benefit for the local economy; at a more micro, individual level cinema can have an impact in terms of audience wellbeing, providing a health asset with a social inclusion role, helping people to feel less alone and providing the opportunity for reflection, insight and empathy. On the one hand it can offer two hours in a comfortable seat away from one's daily life and routine; on the other it provides life-enhancing experiences. We know this to be true, for What London Watches, our major season of 2017, provided four hundred examples and stories from Londoners who proclaimed that a film that changed their life! The value of cinema cannot be understated.

Appendices

- Appendix I – Cinema Financial Summary: 2017/18 (non-public)
- Appendix II – Financial Summary: 2016/17 and 2017/18 Comparison (non-public)
- Appendix III – Top Ten New Releases 2017/18 (1 April '17–31 Jan '18)