



# Europa Cinemas

The Knowledge

Economy

How Data is

Transforming

Audience

Relationships



## **Audience Knowledge and Data Survey**

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**Founded in 1992, Europa Cinemas is the first  
international film theatre network for the circulation of  
European and partner countries films.**

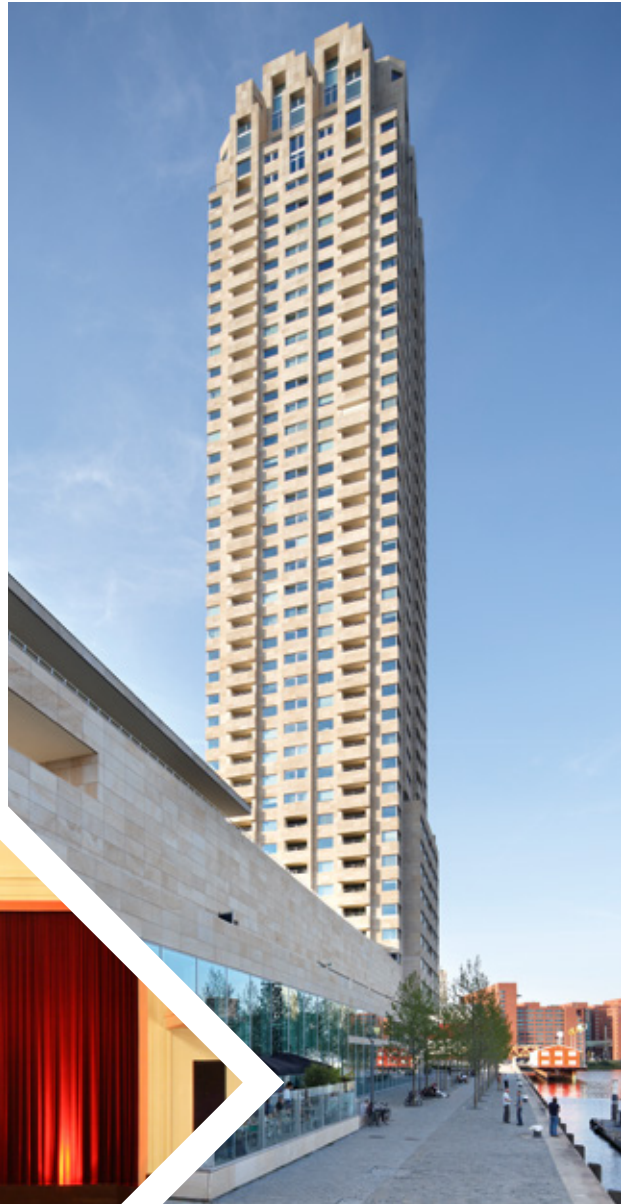
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# Chapter One Methodology

**This report is a study of attitudes and actions in the Europa Cinemas network in terms of audience data analytics.**

The survey was informed by a number of factors, including a series of meetings of the Europa Cinemas ‘Innovation Group’ at the Berlin Film Festivals, which helped shape the aims and objectives of this report. A draft was reviewed by the Innovation Group at the 2019 Berlinale.

At its core of the study is a detailed questionnaire, which was sent to a representative sample of cinemas across Europe (See Charts 1, 2 and 3).

Europa Cinemas contacted more than 300 cinemas in the network, making up 30% of the entire membership.

Cinemas in each of the 34 countries, which are members of the Creative Europe MEDIA Programme, were given the chance to take part. More than two-thirds of those contacted responded in full.

It was crucial to the report that the survey represented cinemas of every size, from one-screen operations in small towns to large independent networks in big cities. The level of financial and staff resources varies widely, and it has been important to ensure that the survey is relevant to all cinemas.

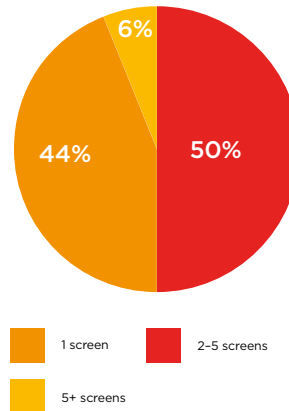
The final survey respondents are actually a perfect match to the overall membership of Europa Cinemas.

This report is a companion to two other reports from Europa Cinemas: *New Approaches to Audience Building and Strategic Investments In The Future Of Film*, which offer more insight into how the network is building relationships with audiences in a changing world. Both reports are available as free downloads at [www.europa-cinemas.org](http://www.europa-cinemas.org).

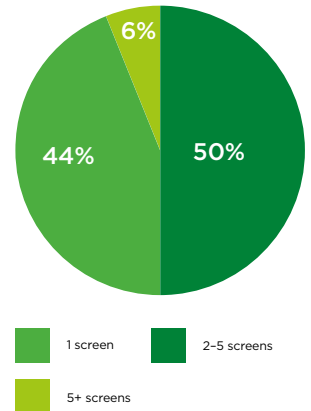
It should be noted that this report differs in some respects from the previous surveys, mainly in the level of experience and understanding of these emerging areas of data analytics, and in exposure to, and development of such services.

There is a marked, though perhaps unsurprising difference

**Chart 2 Network members by size**



**Chart 3 Respondents by size**



in investment, depending on the size of the businesses involved. Larger cinemas and groups are much more likely to be investing in analytics and services, partly because of the amount of data being gathered and the more complex business need, and partly because technology and service developers are more interested in bigger companies. Those tech companies in the data field are also more often in the most developed countries and focused on bigger cities.

It is far from an even picture with pockets of impressive development (reflected in some of the case studies here) but a very mixed picture overall with big divides in awareness of developments, services and even the terminology of the analytics field. This report tries to reflect those differences in its analysis, trying to ensure that comparisons are made on a like-for-like basis.

The report is, however, based on the premise, that Europa

**Chart 1 Respondents by size**



Cinemas members do operate in what is increasingly becoming a 'knowledge economy' where analytics tools are becoming commonplace as a mechanism for understanding, capturing and exploiting audience data. It is clear from the survey that there is wide recognition of the need for greater understanding of audience demand and a desire to use technology to enhance existing practices, even among cinemas with little specific knowledge.

This report aims to focus on strategies and practical business steps that will help all cinemas understand the potential in the market and to find means of making progress that matches the realities of their cinemas.

### Case studies and Super-Users

While it is extremely valuable to understand attitudes and the scale of investment in the network, the real practical value of this report is in sharing the experiences of those who have made the leap into these emerging business areas.

This report offers two approaches to sharing information from those who have already made investments.

The first is in a series of case studies, selected to offer insights into a range of approaches to audience analytics with a wide geographical spread and representing different sizes of business.

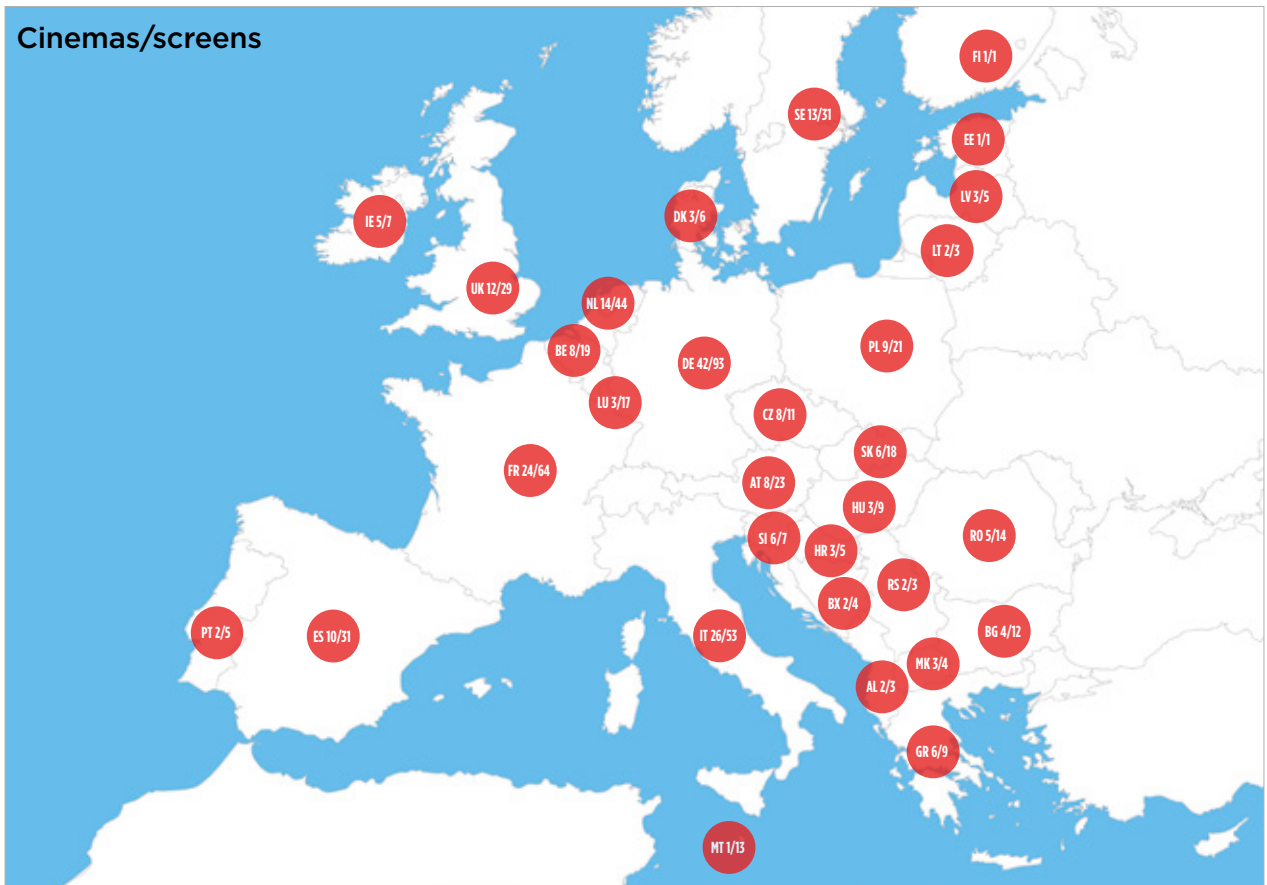
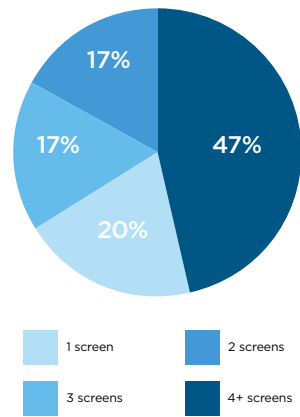
The second is the selection of a 'Super Users' group, comprising cinemas, which have actually spent money on systems and software, and which can be assumed to have

immersed themselves in at least some of the key issues.

The group comprises 30 businesses, 10% of the whole, but they have 122 screens between them, 21% of the total respondents. Almost half of the group are either cinemas with at least four screens or cinema groups. The group is also dominated by well-developed countries with Germany and Austria, UK and Ireland, France, the Netherlands and Italy making up two thirds of the group.

The Super-Users can be seen as the advanced guard of the whole network offering informed opinion and experience.

Chart 4 Super-user's screen size



# Chapter Two Executive Summary

**The following is a summary of the key points emerging from the survey and of the conclusions:**

## **Belief in the value of audience data**

Network members understand competition for consumer time is growing and that audience attitudes are changing. It is now widely understood that new tools are required to manage the big increase in data from a variety of sources, including social media, online booking, email, website traffic, etc. There is also growing awareness that analysing data can both improve the appeal to existing audiences and drive new opportunities for attracting new customers. Some recognise that data analytics are driving other areas of business, such as Video On Demand, that are competing for audience time.

## **A knowledge gap**

It is clear from the responses to the questionnaire that large numbers of cinemas have a fairly rudimentary understanding of data analytics. Some are not sure of market potential, of the specific software and services in the field, and of the value that might bring to their business. It means that the value of their understanding about potential costs, returns on investment, staffing, etc. needs to be treated with some care, which is why there is so much focus on case studies and Super-Users.

## **Evolving strategy**

Many cinemas are using some form of digital analytics to monitor audience behaviour, the value of marketing campaigns, etc. Social media analytics are particularly popular, notably Facebook and they are serving a useful function for business. The thrust of this report is that there is considerable value in greater understanding of audiences and that requires more strategic management and often some external technology and business support. Creating a data strategy that is relevant and effective to individual cinemas is already seen as a necessity by a growing number of businesses and may become so for a much wider part of the network.

## **Immature tech players**

The independent cinema market was not initially seen as a fertile ground for emerging data analytics software, services and customer relationship management (CRM) developers, comprised as it is of largely small businesses. There are signs the potential of the market is now being more clearly understood, particularly where a number of cinemas come together as a purchasing group.

## **Staffing, skills and costs**

The investments under discussion in this survey are not like those in hardware, such as projectors or buildings. They are as much about strategy and new ways of approaching business and, because it is an emerging field, the costs, skills and even value are not yet clear. It is difficult then to be precise about the true costs of ownership. The best options are likely to come from experimentation and from a commitment to a different business mindset. Sharing knowledge about the real skills needs will be important to Europa Cinemas' approach.

## **Data protection**

Data protection is fast becoming a hot issue for politics and society, as well as business. How consumer data is stored and used is now being explored with the potential for new legislation on top of the EU 2018 General Data Protection Regulation (GDPR). It is an issue, which cannot be ignored by anyone interested in data analytics and one that is best tackled collectively, through the Europa Cinemas network.

## **From necessity to opportunity**

Those that have made the leap into data investments appear to be finding value beyond their initial expectations. In some ways, the initial investment is often driven by defensive considerations for the business and European film more widely, particularly a growing sense of changing audience expectations and greater competition for consumer time. The evidence from those who have really embraced data-driven audience development is that they find it has benefits beyond their expectations with targeted marketing enabling fresh thinking about programming, events and the cinema experience more widely. The mixture of necessity and opportunity has helped build confidence in returns on investment, though expectations tend to be for medium-term rather than short-term recoupment of costs.

## **Support for risk-taking**

One of the fears about too much emphasis on data is that it leads to 'lowest common denominator' programming that does not take risks or challenge the audience. But the unique appeal of arthouse and independent cinema is that it pushes the boundaries of audience expectation and taste. The evidence from the case studies suggests that smart use of data is an ally in that task. More precise targeting can find an audience for the most adventurous programming

and data analysis often reveals much higher levels of acceptance of supposedly difficult work than presumed wisdom had suggested.

### Europa Cinemas

In recent years, the network has become highly adept at analysing and sharing knowledge among its members. Its expanding Audience Development and Innovation Labs are exemplary case studies in collective responses to digital challenges and in sharing know-how to unlock opportunities. Social media is helping amplify those debates. The network is also an essential provider of intelligence, recognised in this survey as close to the top of the most important source of information for independent cinemas.

### Best practice

Creating best-practice models is essential in convincing the network of the value of investment in analytics. Europa Cinemas can play an active part through case studies, workshops and reports. There is an argument for creating pilot projects for data analytics to experiment in cutting-edge audience data schemes with the results shared across the network. There is a case to be argued for such pilot schemes to be funded by Creative Europe, in the way it has supported other areas of innovation.

### Leading the value chain

Independent cinema is the most audience-centred part of the traditional linear film value chain. Industry attitudes have been changing in recent years as the film industry has realised the essential need to be closer to audiences. Precise knowledge of audience demand can feed back through distribution, sales and production, potentially influencing what is made and how it reaches audiences. The value of audience data is increasing, not just for cinemas but for the wider film economy.





# Chapter Three Data Analytics

**The vast majority of cinemas, regardless of size or location, recognise that data will play an important role in their businesses, according to this survey.**

The ability to efficiently and effectively connect changing audience habits and expectations is recognised as both a central challenge for cinemas and an opportunity to engage audiences, with a particular focus on younger people.

The need for data management and the potential of analytics seem to be fairly established. More than 90% of respondents say investing in improvements to digital collection, analysis and use of audience data is important, with more than half (57%) deeming it very important or essential (21%).

Most cinemas will be involved in some form of data analytics, even if they do not see it in those terms, through box-office figures, social media tracking and managing a database of existing customers for marketing. In reality, the value placed upon analytics seems to be strongly linked to knowledge about how that data can be used for business, and of the availability of tools to make analytics pay.

The Super-Users group, which has actually invested, is much more committed to analytics with 86% deeming it very important or essential.

In terms of the spending priorities of the whole network, audience data sits a little behind more traditional considerations for investment (See Chart 5), such as events and programming (90% very important or essential), the physical

environment, such as seating (75%), building maintenance (73%) and upgrading the customer experience (70%).

The motivations for investment, as the next chapter shows, are complex and often initially defensive. But as evidence mounts of returns on investment, data will become more focused on creating new audience services, building new audiences and opening up new areas of potential growth that would not have been possible before the digital era. It is clear, however, that there are large business, technological and knowledge gaps to overcome.

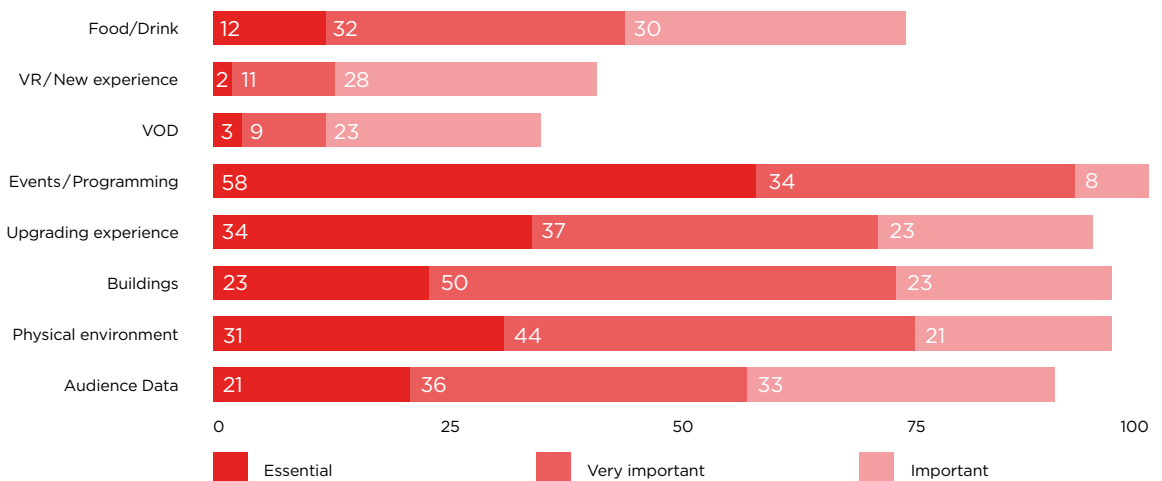
Lack of knowledge is a particular weakness for smaller cinemas. Among respondents with just one screen, just over half (51%) say investing in audience data is very important or essential and just 15% think it essential.

For cinemas with four screens or more, the numbers are 66% with 32% saying it is essential.

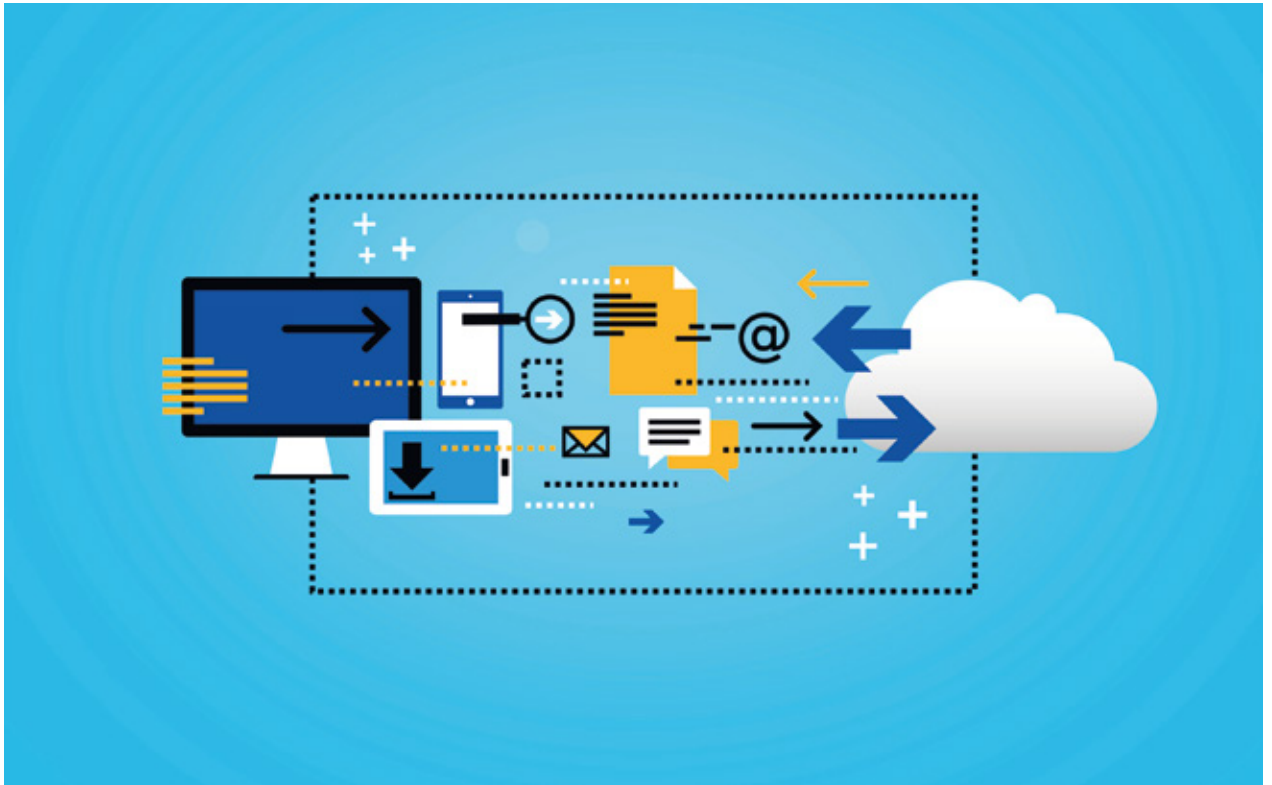
Those numbers reflect the fact that larger cinemas are more likely to have made investments, both because they have more resources to pay for software and services and also because they generate more data to be managed. The same divide between larger and smaller venues can be seen in the assessment of the business value of data investments.

Almost all cinemas see data as having an important role in informing their business strategies. Half of respondents

Chart 5 Investment priorities %







say they strongly agree with that evaluation and 94% agree to some extent. Almost two-thirds feel it leads to better business decisions with 24% agreeing strongly. Bigger cinemas tend to be stronger in their assessment of the value of consumer data: 57% of venues with four or more screens strongly agree that better data on audiences is key to business decisions, compared to 37% of one-screen venues.

As the next chapter will show, larger venues are more likely to base their responses on experience from having already invested in data software and services, compared to smaller ones. A related divide comes in attitudes towards the need for additional data: 45% of two-to-three screen venues believe they already know their audiences and have no need for software and services, compared to 20% of those with four or more screens.

The case studies suggest that most cinemas which have invested still strongly believe in that instinctive sense of their audience needs and wants but all believe that data enhances and ‘sense checks’ those instincts. And most cinemas recognise their faith in traditional relationships is getting harder to sustain because the expectations of service and choice among even established audiences is changing in an era of always-on social media and ubiquitous entertainment options.

More than 70% of respondents agree the relationship between the audience and their cinema have changed in the digital era, with 24% strongly agreeing. Only one in 10 respondents disagree.

This new emphasis on data is not then another digital fad, driven by media hype, but a tool, which is why interest in investment in data analytics dwarfs that in tech trends that have been pushed as the ‘Next Big Thing’ in digital cinema. Video on Demand (VOD) services, for example, are now considered an important investment by only a third (34%) of respondents, with just 12% believe it is very important or essential (3%). A more recent emerging trend in offering Virtual Reality facilities ranks a little higher with 42% considering it important, although again only 13% consider it very important or essential (2%). Data seems to fit more comfortably in the ranks of business necessities, alongside building maintenance and improvement and enhancing the cinema experience. But data analytics and management are not yet core competences for the majority of independent cinemas. Traditionally, the data flow in businesses has been rudimentary with few systematically used external data resources, or market intelligence.

In reality, these are emerging fields for cinema. While software, services and systems providers may be fairly established in other industries, there has been little interest in the independent cinema sector, comprised largely of individual small businesses.

# Terminology: Data in the digital era

The survey exposes the fact that the terminology and some of the key concepts of audience analytics are not widely recognised and understood, particularly among smaller venues. While some cinemas have embraced opportunities, it is also clear that many have not been exposed to data-driven developments that are routine in other areas of business.

It is also clear that the terminology has been loosely used in the market, leading to some confusion and there is a good argument for a common framework of understanding in the network.

Data analytics is the term for turning that increased information into business value. The theory is that the more a cinema knows about how audiences behave and think, the more efficient and effective its business decisions will be.

The following is a simple guide to the thinking underpinning this report and the emerging pathways to success:

## Data collection and retention

Cinemas have always collected information on audiences. Names and addresses were used for marketing with some useful demographic information, such as date-of-birth thrown in. There was also box-office information, with local performance tracked against national trends. Cinemas may also have accessed other useful data from concession sales, trade journals, business networks and word of mouth from customers, etc. The difference today is twofold: an exponential increase in data from sources, including email, social media, online ticket sales, etc; and the potential to analyse that information in greater depth. The next step then is using the most widely available analytics tools.

## Social media analytics

There are some user-friendly forms of analytics that the survey suggests are widely used, including Google Analytics, Facebook Analytics and analytics services from others, including Mailchimp, Instagram and YouTube. They can be powerful tools, allowing multiple measures of audience behaviour and interaction with the cinema. They allow for valuable marketing insights but they tend to have a narrow range of focus, which can miss potentially valuable audience insights. The next step is to build those valuable but limited insights into a broader data management strategy by including a range of data.

## Marketing data analytics

A number of the companies entering the market are focused on how to turn data into effective marketing and to track changes to audience behaviour. Among those cited by survey respondents, Mailchimp, for example, claims to make it “easy to monitor trends, track your performance over time, understand the preferences of your audience, and see how you stack up against the competition.” Movio claims it can “provide a greater understanding of what drives consumer behaviour and a highly targeted channel to market.” These businesses offer mechanisms for systematic collection of key audience data and support for building business services and products on that data, such as loyalty programmes, new customer acquisition strategies. On the other hand, the skill set for creating a strong analytics service should not be underestimated. External partners can support change but value requires business skills and new processes that do not come out of a box. For some, the next step might be a fully-integrated system for managing audience relationships.

## Customer Relationship Management (CRM)

Customer Relationship Management, or CRM, essentially brings together all of the different aspects of data analytics into a single strategic tool. It promises business deep insights into audience behaviour and history and makes it easy to act on those insights through transparent measurement and automated targeting of known demand. CRM systems take on some of those data management tasks that are time-consuming and expensive to do manually. Again, CRM is effective where the mindset of the company is focused on audience development.

The return on investment for those different levels may depend on the size of operation, the competitive environment and local necessity.

On the other hand, the knowledge economy in which all cinemas operate suggest growing importance for greater insight into patterns of demand among audiences. The pathway suggested above may not lead to a fully-integrated CRM system but it does point towards a data strategy to inform critical business decisions.

# Chapter Four **The Knowledge Economy**

**The cinema industry is transforming into a knowledge economy. The giants of the digital world are increasingly building success and growth on audience data and market intelligence.**

The hype around ‘Big Data’, for example, has been building for more than a decade and has gained currency in the film industry because of its fundamental role in the growth of multinational VOD giants, such as Amazon and Netflix.

Big Data is a term generally used to describe how vast stores of business interaction between big companies and their consumers are captured, analysed and turned into value, such as improved products and targeted marketing.

In its simplest definition, Big Data describes levels at which information becomes too big to handle through conventional manual means and requires algorithms and other tools to make sense of the vast stores of information to transform data into business knowledge. While the term itself does not have much value to the individual small and medium-sized businesses that make up the overwhelming majority of independent cinema in Europe, some of the motivations driving the global giants of the digital economy hold true for members of the Europa Cinemas network.

Audiences are changing and to understand and service those new kinds of expectation requires a lot of digital interaction, through social media, online booking, membership schemes, etc. That means an exponential rise in the amount of data to be managed, requiring both new tools and a business culture that understands how to manage data in terms of input (what is collected and how it is organised) and output (how data is analysed and used). And, as this report will show, cinemas are finding that the more data collected and the better it is analysed and managed, the more opportunities reveal themselves in every aspect of the business. In practice, that means investing in tools and services that can integrate data into the audience-centred business strategies.

## **Motivations for investment**

Much of the drive towards Big Data and audience analytics in other industries around the world has been about getting an edge on the competition. But competitive advantage is not seen as the primary advantage of data analytics, perhaps reflecting the fact that many cinemas are rooted in communities where there are few or no direct theatrical competitors, particularly in the screening of European and art films. Although 77% say competitive advantage is important, only 13% consider it an ‘essential’ motivation. (See Chart 6).

The number is significantly higher among Super-Users, with 91% considering it important and 51% either very important or essential (25%). Increased competition may be a strong motivator for investment and it is notable that 80% of the Super-Users saying competitive advantage is an ‘essential’ motivation are in major European cities where the threat of multiplexes and even other independent cinema chains are strong.

The more important perceived opportunities essentially come in two categories: finding new audiences, or improving services for existing customers, encouraging stronger retention and higher levels of engagement.

## **Improving services**

The network as a whole believes in the importance of data analytics to audience retention and to improving services to keep that existing base happy.

Close to 90% of cinemas, for example, see loyalty schemes as an important potential advantage of data software and services, with more than half (55%) believing it to be very important or essential. Respondents indicate a similar level of interest (88%) in using data to make their programming choices more efficient and effective, and 61% seeing it as very important or essential.

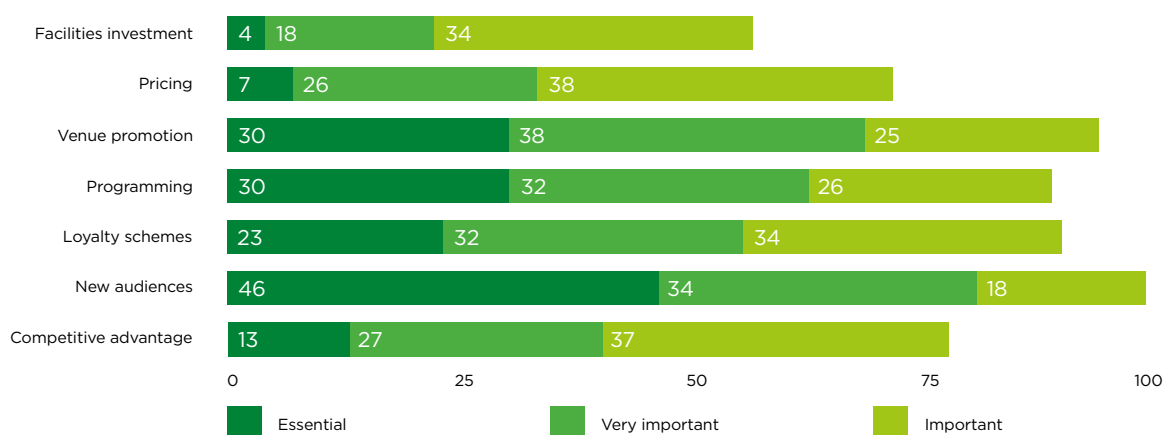
There is less interest in some of the specific actions that might increase audience engagement, such as pricing, which is considered important by 70% but essential by just 8%. And using data to support investment in restaurants and other facilities is again seen as important by over 50% but essential by 4%.

The pattern though suggests the recognition of audience data as a multi-faceted mechanism for supporting a range of audience building activity, or as one respondent astutely put it, “community building.” As the case studies demonstrate, that requires a commitment in terms of business attitudes.

## **Finding audiences**

The potential for using software to identify new audiences is the high priority for most cinemas, according to this survey. Almost 99% of respondents say it is, or would be, the primary motivation for investment, and close to half (46%) say it is essential to any decision to invest.

Chart 6 Investment motivations %



The Super-Users group clearly take the same view and it is their primary motivator with all saying it is essential or very important and 70% calling it essential. Over-reliance on a core base of cinephiles is a serious challenge and previous Europa Cinemas reports have demonstrated that most have an ageing audience and reaching young people requires innovation and a mastery of social media.

The case studies in this report also suggest a less instinctively loyal audience and an expectation of personalised service in an environment with a multitude of other ways to spend time and money. Analogue methods of trying to find new audiences, such as leafleting or newspaper advertising, tend to expensive and inefficient. Indeed, some cinemas are paying for data investments by scrapping their paper products.

Finding, winning and (crucially) keeping new audiences is also the toughest task of this data revolution and the tools are limited. Sometimes the approach also comes with costs, such as social media and print advertising.

Marketing individual films to grab the interest of specific demographic and social groups can be the bait for building initial engagement. Interestingly, some of that work includes strong relationships with partner organisations, who themselves may be looking to increase their own appeal.

The task then is to ensure that a first visit leads to more, and that means looking beyond any individual title to marketing the venue itself. As well as specific targeting tools, there is a more general interest in cinema brand promotion, deemed important by 88% of respondents, with 68% considering it very important or essential.

### Disincentives and barriers

Recognition of potential value has to compete with a set of factors that act as barriers to investment. Unsurprisingly, the core issue for exhibitors is the cost of purchase and the return on investments. It is an important issue in making investment decisions on audience data for 97% of respondents and considered “vital” by almost half (47%).

There is little difference in attitudes between the bigger and smaller cinemas, though there is a marked difference between cinemas in Eastern Europe (broadly the areas of the former Communist states), where 60% see it as a vital issue, compared to those of Western Europe (37%), perhaps reflecting broader economic conditions and weaker access to capital. Those concerns do not necessarily reflect a lack of confidence in either potential value or returns on investment (ROI). Or more to the point, most recognise they will need to invest in data analytics even if they are not yet convinced about returns on investment. 60% of respondents say they are not sure of the value of investment, yet just 16% considered that it would be a vital factor to stop them investing. In other words, for many, investment will be a necessity to keep on top of audience data and to remain competitive, rather than a driver for growth.

There were practical worries, however, that might influence buying software and services. Staffing and skills are an important concern for 82% of respondents. But an area of serious concern is the future-proofing of investment. More than 90% (92%) say they are concerned about the costs of future upgrades. More than 60% say the upgrade issue is very important or vital, though there is a gap between one-screen venues (65%) and larger venues with four screens or more (52%).

The Super-Users group tend to confirm the attitudes of the overall response: 95% say the cost of software and



***“Data protection is very important and we are all working on it but it is particularly difficult to manage as small cinemas.”***

services is a very important or vital barrier to investment and 86% say the cost of upgrades is an important issue for them with more than half (54%) calling it a very important or vital consideration. Given that they have all made initial investments, those concerns are particularly telling.

### **Data protection**

Some investment has been driven by changes to data privacy law, and particularly the European Union’s General Data Protection Regulation (GDPR), which came into force in 2018.

The law – which harmonised regulation across the EU – forced cinemas to review and often change the way they had managed audience data.

Over the long-term, privacy laws may act as an incentive to invest in software and services that will have long-term benefits. On the other hand, concern about legislation now in place or may yet be to come act as a disincentive to invest.

Almost 80% of cinemas say it is a concern when looking at strategies for data collection and management and 42% say they are “very concerned.” Less than one per cent believe it to be irrelevant.

For those who have already invested, it is clear that data protection is seen as an important concern for their strategies. Close to 90% say it is an issue of concern with 55% calling it “very important”. Those data concerns may have grown since the questionnaire was sent out. There has been a great deal of publicity surrounding the misuse of data by companies, particularly in social media. That issue may become bigger, opening questions about the way that companies market their products.



## Case Study **LantarenVenster, Rotterdam** (Netherlands)

LantarenVenster was a city institution as far back as the 1940s. It moved to its current location in the Kop van Zuid district in 2010 but still keeping its mix of film and music.

Head of programming and marketing Roderik Lentz said investments that improved the way that the venue understood and interacted with its audience was a business necessity in a changing market.

The venue has invested in a system that helps translate online ticket sales into valuable data for improving services to audiences.

The venue invested in a system called Active Tickets, a Dutch company specialising in online ticket sales and helping those sales to add valuable data. The ease of use of the online ticketing had appeal to a wide demographic and use among older audiences was at least as strong with younger ones.

Roderik said the emphasis on younger audiences was in danger of missing an important point that the more established older audience was often tech savvy and very loyal to both the venue and the type of films they showed.

He said some of those resistant to change or who struggled with the culture change of the new economy should learn to delegate: “If you are not confident or comfortable yourself, hand responsibility over to someone who is.”

Some of the most effective tools, he suggested, were also the most widely available. Google Analytics, for example,

had been a very valuable tool. When integrated with the customer database, it can quickly show, what kind of audiences are returning to book seats, who those customers are, how much time they spend on the site. The ticketing system was introduced in 2011, along with a new website and database, creating a new interface with audiences. He said basic data, gathered and carefully analysed, such as birth date, location, frequency of visits, etc. offered significant insight. And those insights could grow with each new interaction.

Critical to building that knowledge base was a strong online ticketing system. That included incentives for audiences, such as priority seating and immediate entry.

There was value for the business, even before the gathering of data, in reducing waiting times and queues at the box office at busy times. He said it was important to make the booking process fast and efficient on all platforms but there were clearly benefits welcomed by audiences. He said festival online bookings now made up 60% of the total, compared to around 5% five years ago.

The real value of the ticketing system was now clearly evident in the growth of the company. Although analytics does not necessarily create growth, it is essential in maintaining it and ensuring that it is built on the secure foundations of knowledge.

The main benefits came in targeted marketing, which he said were now “very creative and very precise”. The analytics



that work are based on what is a “small science.”

The main benefit has been in more targeted marketing. Using the data from the platform, it was possible to segment the audience into five essential categories, that could be personalised with names. One category, for example, was named Jeremy’, describing a 25-year-old former student, now entering the world of work. He is open to new ideas and has ‘hipster-ish’ tendencies to enjoy trends. Each category can be understood in terms of their tastes, media habits, cinema-going frequency, etc. although he warned that those categories need to be frequently reviewed and that their cultural appetites should not be assumed to be permanent.

He said there were regular surprises that meant adapting categories.

Data analytics had become an essential way of targeting audiences, but he said the desire to continue to champion films that had no obvious audiences and were selected on an adventurous sense of artistic merit was still a big part of the business. In those cases, the great benefit of data was that it made those films that had clearer audiences work more efficiently and effectively, allowing more room for risk.

He said there were costs to installation and that included staffing costs. He said the human element could not be removed from the equation. Customers filled in their data wrongly, there were glitches and crashes in the system from time to time. But he suggested that additional hours had been easily offset by better business performance.

He had been involved in the development of the software for the specific needs of his work. Often ticketing systems were developed for big venues that would typically have a single act for an evening. Cinema, even for smaller independent venues, is more complex with multiple screenings and a variety of audiences. He said data analytics technical partnerships were open to review to ensure they continued to deliver the desired value.





# Chapter Five Data Investments

**A theme that runs through the case studies and the majority of responses to the questionnaire is that investment in audience data is now a necessity.**



That need is partly driven by a feeling that cinemas are operating in an environment with much greater competition for time and where new tools are needed to track a changing and very demanding audience.

Initial digital investment in understanding and tracking the market can be low cost and sometimes free. Social media has brought major benefits in marketing and allowed a more interactive relationship with audiences.

Those relationships can be captured and turned into valuable insights through analytics tools, provided by the social media services themselves. Respondents cite Facebook Analytics, for example, as a day-to-day tool. Facebook, with its huge demographic reach, is also used for targeting audiences for individual films through its paid “Boost” system, again offering the additional benefit of analytics to capture the results.

Online ticket sales have also offered major digital advantages, allowing the tracking of individual choices and habits. And membership cards are even more effective, as they offer data insights with the active consent of audiences.

Cinemas will have many other forms of data, including performances of individual films at the box office and a history of manual records.

There has been an exponential rise in the amount of raw digital data that requires collection and management.

## Databases

All forms of audience interaction, such as social media, are creating far more data and insight than traditional systems can handle and there needs to be a central repository for that information in a database. Data held on audiences is the key foundation for business strategy.

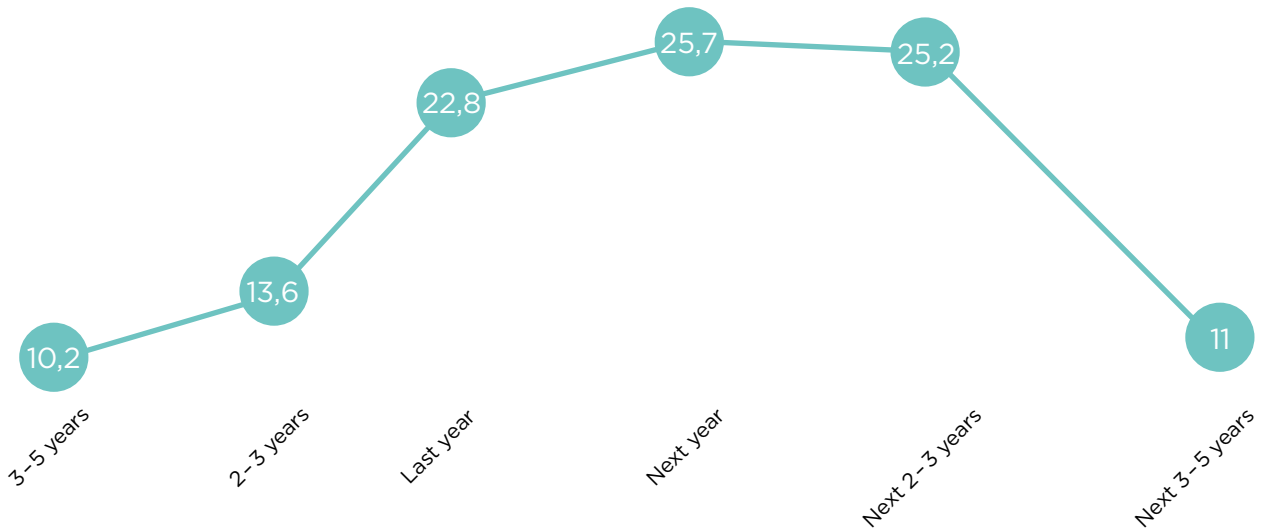
Just under half of respondents have upgraded their customer databases in the last five years with the largest number (23%) coming in the last 12 months. But it is telling that more than 90% of the Super-Users group have either already upgraded their database (80%) or have plans to do so.

Upgrading means making sure the data is compatible with systems and software, creating fields and metadata to reveal the necessary insights to business value, and sorting out technical and legal issues.

The costs of improvements to managing the customer database is dependent on a wide range of factors, largely based on how the data is intended to be used. Just 12% expect the benefits to outweigh costs in the first six months, rising to 25% in one year, a further 20% inside two years and 30%



Chart 7 **Database upgrades %**



in two-to-five years. But the value of that investment still worries the exhibitors in this survey.

Data storage is not free, there are significant training and skills issues around the management of metadata, and there tend to be costs associated with hardware. Capacity, storage and interoperability with software and other systems can be an issue. In terms of the collection and management of data, still more than 80% say they are concerned, or “very concerned” (37%) about costs of hardware purchase and maintenance.

The key consideration is how to make a passive database into an engine for audience development.

Only a quarter of cinemas (26%) say they gather data on the tastes and habits of their existing audience but those that do claim it has helped inform strategy, with just under 40% saying they have made decisions based on audience data.

### **Data analytics tools**

Data analytics tools are only now beginning to make an impact in the independent cinema world, the survey suggests.

As with database upgrades, the expected returns on investment are dependent on specific tools and services. The use of low-cost and free tools, such as Facebook Analytics and Google are being used reasonably widely. 80% of

respondents say they believe social media analytics are important to their business. (See Chapter Six)

They are sometimes being used in combination with other tools, such as digital marketing data service Mailchimp.

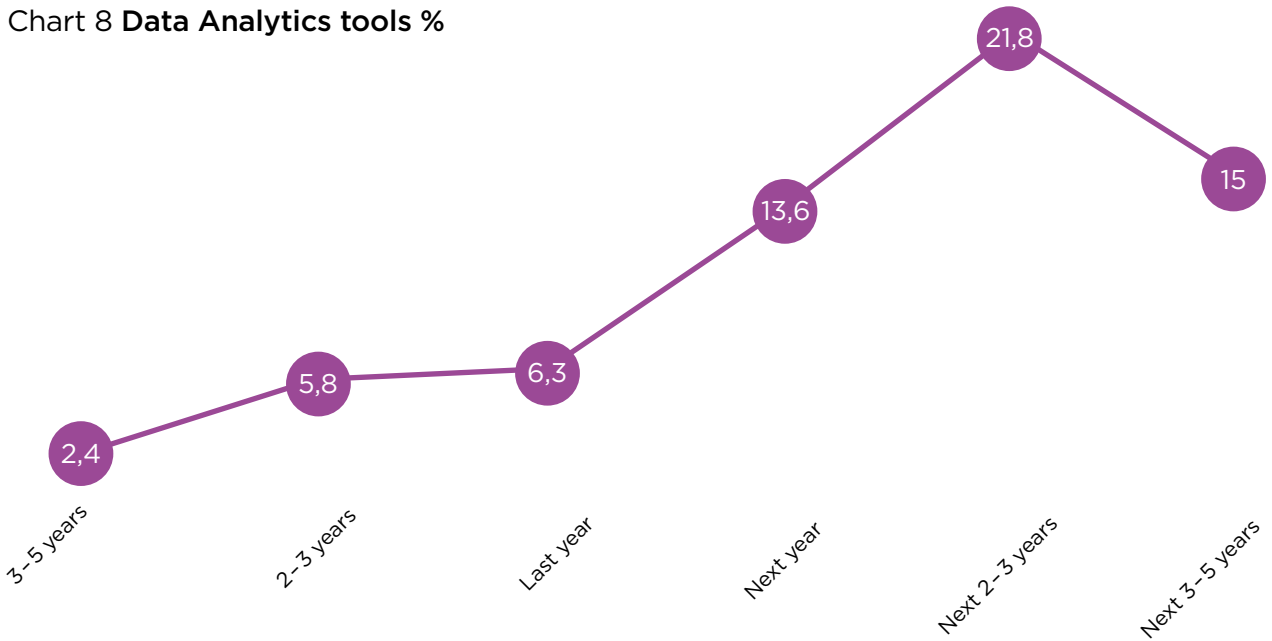
There are companies in the field that have been pushing into the cinema sector.

For this report, respondents say they are working with companies, such as Vista, Movio and Showtime Analytics but there are other businesses often operating on a regional or national level. But the pattern seems to be of low expectations after six months, though with a belief that over the longer term, full benefits will be realised: 29% in the first 12 months, 19% in the first two years, 26% in three-to-five years and 24% after five years.

Those numbers may be based on a limited dataset, given the current low usage of such tools. Those who have invested are generally positive about the impact: 84% say the analytics tools are important to their business with 59% calling them very important or essential and 24% describing them as essential.

***“We strictly follow audience expectations, which are evident from their interest in specific titles”***

Chart 8 Data Analytics tools %



### Customer Relationship Management

The ideas around CRM have been around for decades.

They have evolved as companies increasingly digitise customer data and as the size of the data collected began to grow exponentially.

In essence, CRM describes all technologies and strategies that come together to manage a company’s interaction with the customers they have today and the one’s they want in the future. In practice, CRM is used mainly to describe a system that integrates front of house and online sales, social media analytics and other audience interactions into a form that can be managed by the venue and helps deliver value through identifying trends and targeting customers. In

other words, CRM brings together all the activities in this report into a manageable system that can be integrated into the general business environment and brings a high level of automation to business and marketing campaigns.

For most independent cinemas, data management and analysis are a new field and the amount of data generated through current use has not created the need for such systems. Equally, few service providers have seen the potential in smaller independent cinemas. Just 16% of respondents say they have been approached by a CRM service provider in the last 12 months.

The responses to the questionnaire are generally either that cinemas are unaware of what CRM does or could offer



in practice to their business; or they recognise it as a long-term investment but feel it is not yet a high priority.

Less than seven per cent of respondents have invested in CRM software in the last five years, 4.4% of whom acted in the last 12 months. The pace of change, however, will pick up over the coming months of years, reaching peak in two to three years' time. Those who have invested value its contribution to the business, with more than 70% saying it is important and 50% "very important" or "essential".

The survey suggests that almost two thirds of respondents (63%) have no plans to invest in CRM. That may reflect lack of knowledge as much as a clear business choice.

New products and improvements to existing CRM offers in the market and evidence from 'early adopters' in the network may change thinking on investment. Europa Cinemas may play an important role in sharing an understanding of the true value of such investment.

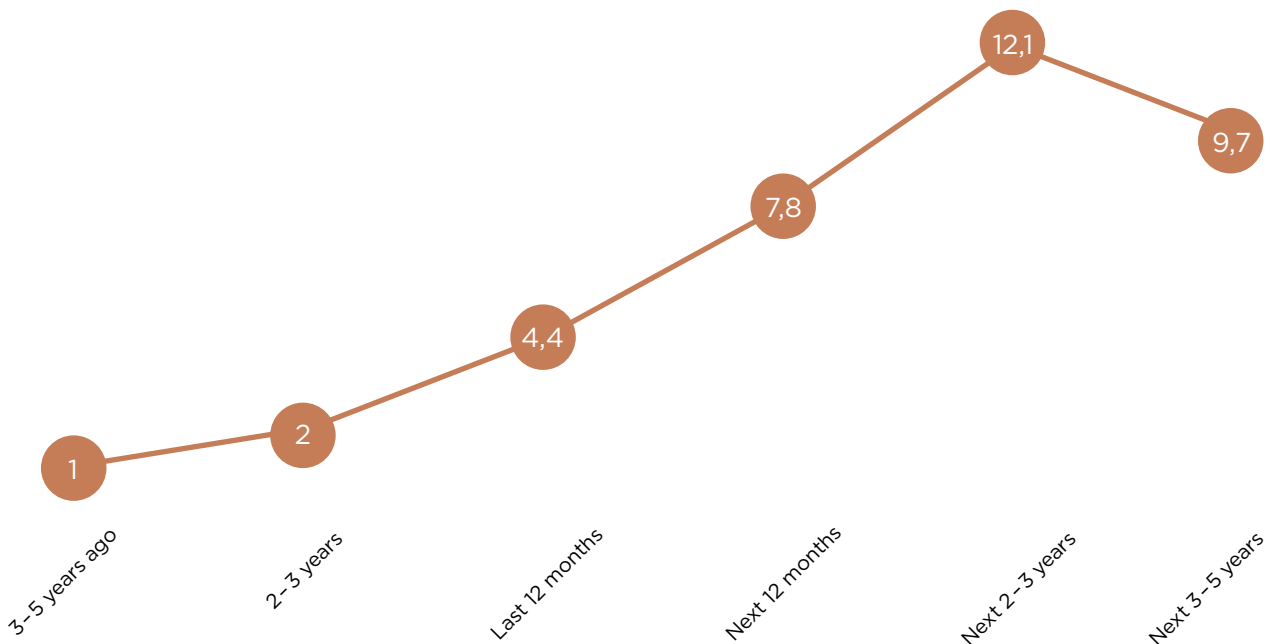
Reports of the costs of CRM software are not entirely clear. In some cases, they may form one integral part of a general overhaul of data management at a venue, where the

specific costs of what might be called CRM are not clear.

In other cases, relatively low-level data software may be labelled CRM, while actually being a rather simpler data management tool. Whatever, the costs, the majority of those investing, or planning to invest, see medium-term, rather than quick returns on investment: 43% expect to see full returns on the investment between two and five years. Just 16% are expecting results within a year.

***“We would like to invest in CRM but have no experience and need to invest in other priorities first.”***

Chart 9 CRM investment %



## Case Study **Cinemazero, Pordenone** (Italy)

Cinemazero was founded in 1978 and is the only arthouse venue in the Northern Italian city of Pordenone, which has a population of 50,000.

It is a proudly community-centred venue, averaging around 100,000 visitors a year and it runs the city's mediathèque, which lends out 40,000 films a year for free.

The venue was renovated last year, including opening a fourth screen, and it has also been modernising relationships with its audience. It has always been a cinema with deep roots in the community. Around 7,000 people subscribed every year to a membership card scheme, and the cinema says it treats those customers "like family."

To an extent, the motivation for investment, says Cinemazero coordinator Riccardo Constantini, has been to find ways to let the family grow: "We want to transfer that real community in a virtual one." But the venue goes further than digitisation of the established business, it aims to offer individual experiences within that collective community, hence the title MyCinemazero.

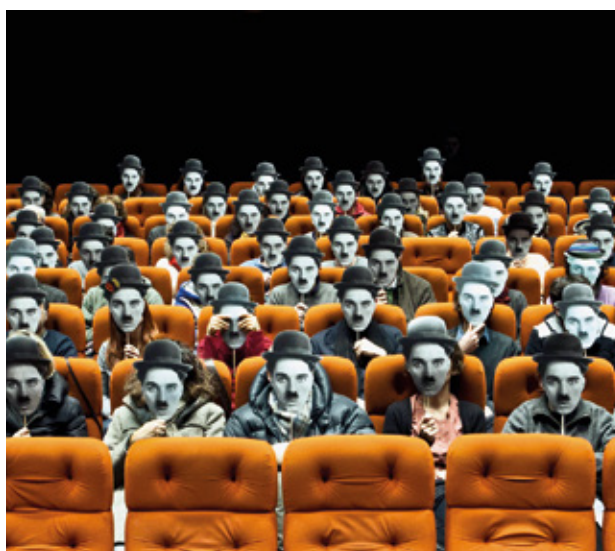
Each interaction with the business, whether becoming a member, buying a ticket or renting a film was seen as a chance to capture the taste of the audience. Those interactions are gathered and analysed, allowing the cinema to look at ways at organising its rich film programme, so that content most effectively matches the proven habits of audiences. So, the cinema could put on the most appropriate content for different times of the week, and audiences are able to build their diary around their own personal preferences.

Monday, for example, is devoted to classics and restored film; Tuesday to events, art, opera and theatre; Wednesday to "Meet the director"; Thursday to documentary, etc.

Audience members are encouraged to share their feelings about the programme through a Facebook site and that personalised service is important to the cinema. "We are not Netflix, we believe in real people and a real community of people, who know each other", said Constantini. He said it was important that too much faith was put in automated systems and that there was a genuine two-way relationship, which he calls "a double grade of fidelity." So, while the ever-enriching source of data helps build a clearer picture of tastes, it is never taken for granted and frequently checked. Even for a pioneer in the field, the venue has also faced technical challenges.

The venue wants an integrated system where its new website, social media data, etc. can be seamlessly integrated with a new online ticketing service. The desire for a business-friendly system is challenging because of difficulties in making different systems work together.

Interoperability of systems and of hardware and software is a genuine challenge for cinemas with ambitious data plans. In the case of Cinemazero, there are practical considerations because it is a multi-faceted business, with a mediathèque on one system, the cinema on another and the international festival daily audience that is difficult to link to the normal cinema crowd. "This is very stimulating on one hand, but very challenging and stressful (we are a small team) on the other hand".







## Case Study **Thalia Kino, Potsdam** (Germany)

Thalia Kino in Potsdam was approached by a promising new German entrant into the audience analytics field, Cinuru, with a chance to become a pilot project.

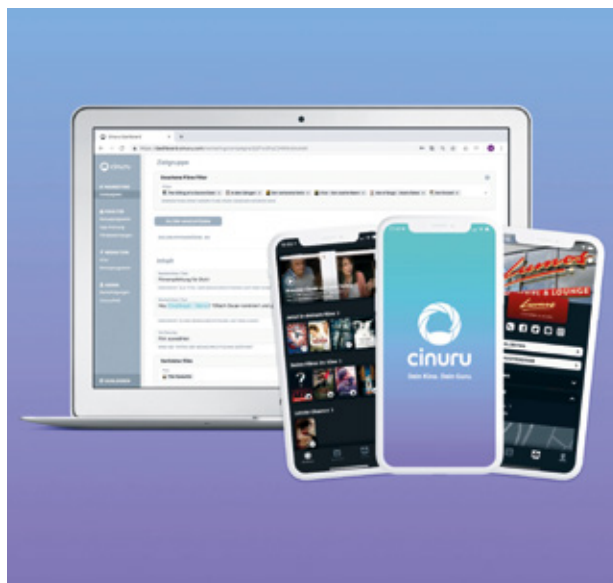
Cinuru's offer is based around a "cinema loyalty" app, which incentivises audiences to engage more closely with a cinema and programme and then collects and analyses the data created. Customers can download an app, with opportunities to rate films, keep watchlists and earn rewards for visiting the cinema. The approach is intended to support effective loyalty schemes, improve marketing and audience targeting, and to generally help in the development of audience-centred plans. In the early stages of development, such developers are generally keen to work closely with cinemas and Thalia in Potsdam was identified as a partner.

Thalia's approach to data had previously been fairly conventional, based on email and social media transactions, particularly Instagram and Facebook, and on data captured through online ticket sales.

Thalia saw the Cinuru offer as an opportunity to address some common issues for independent cinemas, particularly how to engage younger audiences, and was attracted by the opportunity to customise the app for its particular needs, alongside the basic transactional data. "The app shows out current schedule and links to our online ticketing, and a bonus programme adapted to our needs and possibilities," said Daniela Zuklic, Head of PR and Events at Thalia.

The cinema was offered an initial six-month reduced fee and Cinuru also provided additional technical support, including hardware, such as tablets for cashiers to support ticketing and concessions, all of which reduced the risk, but Zuklic says there were challenges to taking full advantage of the potential of the service. While the app was intuitive to use, it did require a change of culture to ensure that the data was integrated into the marketing planning and activity.

Among audiences, there was initial enthusiasm with around 500 people installing the app but only 100 are using it regularly and only 60 are actively participating in the bonus programme.



The short-term returns have been limited, although the venue always understood that new systems and services take time to reach their potential and it is important to build habits among audiences. There were some promising signs in that customers were using the app for rating films and putting titles on their personal watchlist.

It is not yet clear how these early engagements will develop into longer-term habits. The venue suggested that making such apps work required a degree of commitment, rather than an easy solution to audience issues. "The success of the app is very dependent from the engagement of the cinema," said Zuklic: "Customers have to be informed via different marketing channels and so the staff needs to be actively involved."

# Chapter Six **People and Skills**

**The case studies for this report confirm that introducing any form of automated data collection, management and analytics system has implications for people within organisations. It changes the dynamic of the business, requiring both new skills and challenging some of the assumptions and practices that have been in place for decades.**

In marketing terms, for example, digital marketing strategies might directly replace established print publishing, which requires different skills.

In the case studies here, the venues have generally welcomed the fact that data sometimes contradicts long-held assumptions and a belief in individual instincts. For them, data sharpens their thinking and helps rationalise their risk taking. At a more practical level, all digital installations require more intervention than originally imagined. The survey suggests that respondents are fully aware of the issues.

Concern about staffing and skills is cited as an important issue in decisions on investing in data analytics and management software and services by more than 80% of respondents. In terms of the collection and management of data, 77% of respondents are concerned about potential staffing and freelance costs, 67% about the financial burden of training and skills, and 52% about shortage of skills.

Currently, 77% say audience data responsibilities are managed within existing teams with 4% employing a full-time person specialising in audience data and 10% having a part-time specialist role. Just under 5% say they use outside experts to support their work.

Responsibility for data management, and services derived from it, generally sits in the marketing department, or with whoever has responsibilities for marketing. That makes sense for most, ensuring that marketing is able to discover trends revealed in data quickly, and to think strategically about how

to use the knowledge at their disposal to create new and improved services.

Data consultants have been employed by 12% of venues in the last year, particularly installation and understanding how to extract value from data. Some have been employed for specific tasks, such as creating a social media strategy. The case studies in the report do recognise a shift in the culture of the business and the dynamics of management but that understanding may come as the use of data deepens and becomes more integrated into the business. For most, the expectation remains for relatively low structural change for staff. Just 23% of respondents say they have revised staff workflows and management structures but it would be dangerous to draw too many assumptions from that data on the real staffing needs of an effective data analytics strategy. Many respondents have not tested assumptions in practice.

The case studies confirm the concerns of the network that there are real skills and staffing implications that should not be underestimated. And the Super-Users Group experience is more sanguine on real costs. Half of the Super-Users group now employs at least one individual to specialise in customer data management and data-led campaigns and 60% have employed an outside expert or consultant with 40% in the last year with a third planning to bring one in over the next year. Of those that have employed outside experts, all of them say their work was either 'very important' or 'essential'.

***“Outside experts give us new insights about our audience and give us knowledge we don’t have.”***

## Case Study **Glasgow Film Theatre, Glasgow (UK)**

Glasgow Film Theatre began as a single screen cinema in 1974 and has developed into the most diverse and best attended independent cinema in Scotland. It is the hub for the increasingly influential Glasgow Film Festival and has a central role in the British Film Institute's Film Audience Network.

The GFT has always been a forward-thinking venue, with a reputation for embracing the unconventional in its programming and its approach to business and audience.

It has, for example, taken a very positive and proactive approach to the rise of Video On Demand, which is seen by many to represent a serious, even existential, threat to cinema, particularly when traditional release windows were broken.

The GFT had its own short-lived VOD service, developed alongside Edinburgh Filmhouse, with distribution platform Distrify. The results were disappointing but Director of Programme Allison Gardner remains convinced that the threat of VOD is exaggerated, at least for the majority of films. Part of her reasoning is that audiences showed consistently that they preferred to go out to watch films but wanted a choice. "Maybe it is our cold Northern climate but people in Glasgow like to go out." Very dynamic theatre using CRM, Mailchimp, Google Analytics, employing external specialists to carry out audience surveys, using the analytics of Facebook, Twitter, Instagram, YouTube, having a Complimentary MUBI membership, sharing information with the Filmhouse Edinburgh...

Partnership plays an important role in the development of cinema strategy. The GFT plays a lead role in the British Film Institute's Film Audience Network programme. The drive to innovate comes partly from a feeling of necessity. It is not simply a change of audience behaviour, there are also pressing concerns. "We are at a stage where public funding of cinema is never going to go up, while our basic bills, such as electricity continue to increase. We are effectively facing cuts, so we need to take opportunities that come from digital changes."

The constraining factor tends not to be the products or the imagination of the cinema but the pressure on time. The GFT is not short of innovative ideas but it has to prioritise. A "scattergun" approach is simply not a smart way to do business.

The GFT has some novel factors to its CineCard membership scheme. Alongside more conventional offers of reduced-price tickets to selected screenings (including Event Cinema live streaming of theatre and opera) and priority booking, the venue offers a three-month subscription to arthouse VOD service Mubi. "Together we came up with a partnership whereby GFT CineCard holders get a year of MUBI as part of their membership, and we promote MUBI's programme on our cinema screens throughout the year," said Gardner. "It's a bold offer that is bearing tremendous fruit; CineCard uptake has spiked significantly, and the feedback from the GFT audience is hugely positive. Added to this, MUBI's prioritisation of European titles means that our CineCard audience is immediately exposed to an even wider spread of diverse, independent cinema."

"We have introduced a 15-25 Card which enables holders to see all films at half price and we have seen this encouraging those audiences to take a chance to see a wider variety of films."

The cinema has forged a close relationship with the Filmhouse venue in the Scottish capital Edinburgh. The two have already worked together on a joint VOD platform, in partnership with Distrify. Data, she suggests, is used most effectively to sense check decisions, rather than lead them. "We use it mostly to refine our thinking." That kind of analysis is important in assessing the benefits of day-and-date releases, which the GFT is convinced do not represent a threat to the box office for different kinds of releases.

She said the data actually tended to confirm rather than change the thoughts of the team. Allison said that the cinema still needed a human face and a personality to which audiences might warm. Sometimes that meant making "irrational" decisions about programming, choosing a film that is extremely risky for the love of film.

Visits to film festivals may lead to programming of works that would not easily fit the demographic data or algorithms of any data engine.

"Love and passion are not quantifiable." But the combination of passion and knowledge makes a compelling case.





# Chapter Seven **Serving Audiences**

**There are two distinct needs for data strategies and activity: to find and capture new audiences and then to ensure that those audiences that enter the building are given the best possible experience.**

The first part is covered in the next chapter but the second is critical. In today's market, the competition for audience time is tougher than ever and there is never room for complacency. In other words, marketing and customer service never stops. Fortunately, the digital age now offers tools to help.

Social media is the most critical of all new marketing tools of the last 30 years and the analytics offered by services is playing a big role in making the most of audience interaction. It is the one area of this report where data analytics is playing a role across the full breadth of businesses.

Facebook Analytics is by far the most popular service, used by 92% of respondents, reflecting both its dominant position in all EU markets (77% market share 2018). Facebook's power is in its ubiquity, covering a wide range of demographics, with strongest growth among older users. Second placed is Instagram, which is owned by Facebook but has its own specialist analytics. The two other big names are Twitter and YouTube, both of which offer analytics tools. Alongside those social media giants are other valuable analytics tools from Google and Mail Chimp.

Social media analytics is now firmly integrated into the audience development systems of most cinemas, with 80% considering it important, 40% very important or essential (12%).

The value of more effective and efficient targeting of audience marketing is the main motivation for investment in

data software and services for more than 70% of respondents.

Data strategies are influencing a number of core business areas.

## **Programme and events**

The value is also demonstrated in other areas of the business.

Events: Building and enhancing film programmes and events is seen as one of main value factors in investing in audience data.

More than 60% say they are interested in the potential for audience data to inform the programme and 44% in building events, with 56% interested in creating specific events for known parts of the audience. Creating events is one of the first uses to which venues apply their audience data investment.

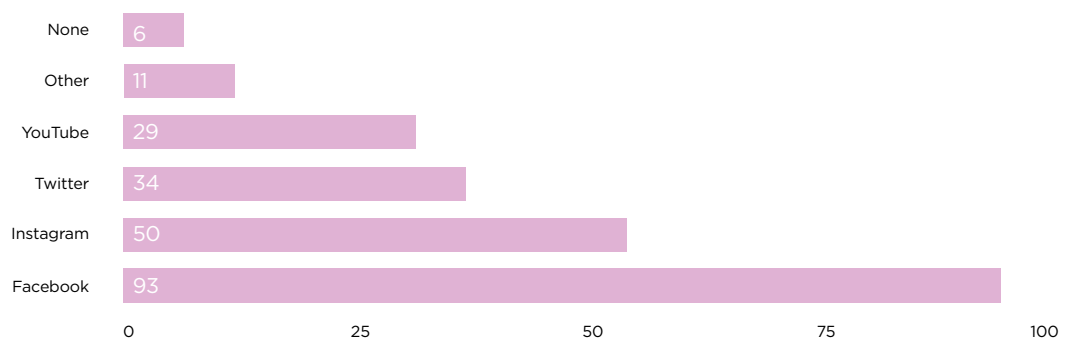
Understanding consumer demand opens up the possibility of highly targeted events, looking to capture proven customer interests. Those events are often aimed at specific demographics, social groups and communities, such as LGBTQ festivals or children's events.

Sometimes they serve cinephile appetites, such as screening other works by auteurs around the time of a new work.

## **Cinema On Demand**

The potential for audience-selected programming has been around for some years although it has lost a little of the early

Chart 10 **Social media analytics %**







hype, following the closure of some pioneer services it is still strong in some areas. In some ways, it is the most logical extension of the digital engagement idea, allowing audience members to programme their cinema to their own tastes.

There are pockets of activity but just 16% say they have used data to build such programmes but there seems to be little demand for cinema on demand.

There is an argument that the targeted curation mentioned above makes the idea less relevant because cinemas are offering a more personalised service.

### **Loyalty programmes**

Loyalty programmes were among the earliest uses of digitised data, building on work that was sometimes already in place in the analogue era. Two thirds of those who have such programmes created them between three and five years ago.

There has been more recent activity with one-in-five respondents saying they have built a programme in the last 12 months (perhaps replacing an existing scheme). That level of investment looks set to continue over the next three years with 20% looking to invest in the next 12 months and 21% in the next two-to-three years.

Loyalty programmes have been particularly important to the Super-Users group, where 77% have made investments. Most of the schemes are based around incentives for repeat visits, including reduced ticket prices, priority booking and special events.

The incentives and rewards for loyalty scheme are dominated by lower-cost tickets (81%) and special screenings (50%). But respondents report a range of ideas. The most common is a membership card, which entitles the holder to a set number of cheaper tickets.

There are other incentives attached with some special screenings and sometimes priority booking. Such cards have been a longstanding commitment for many cinemas, with some operating for a decade or more.

Most cinemas have been happy with the benefits that loyalty schemes give them. Close to 90% of respondents say they are important to the overall business and more than half (52%) call them “very important” or “essential.” In terms of all network responses, cinemas seem confident that they can manage work in-house with 90% saying they do not intend to buy specialist software.

It is true, however, that the bigger cinemas and groups have tended to integrate loyalty programmes within a larger data strategy. Technology companies now entering the field tend to promote loyalty schemes as a key part of their overall offer.

### Pricing and booking

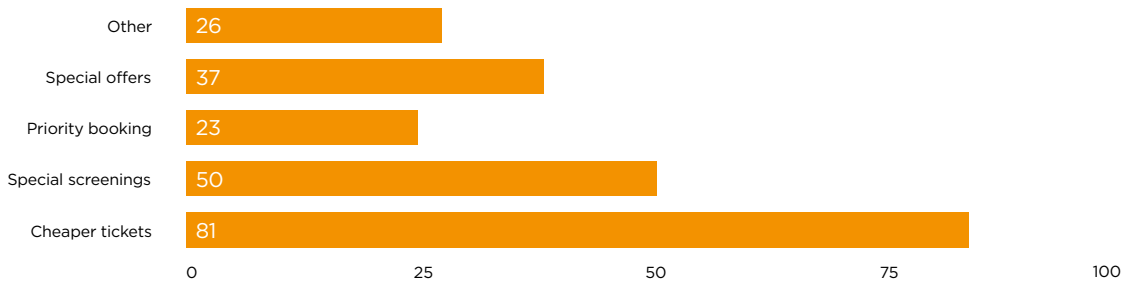
While price is the biggest incentive for membership, data and audience analytics are not being routinely used to test assumptions on ticket costs, a tactic used by just 17% of respondents.

The opportunities for digital are clearer in the encouragement of online booking. More than 40% say they use it as a method for collecting data. On the other hand, the potential value has not encouraged venues to offer incentives to promote online booking with 75% of respondent offering no deals.

Those that do are split between cheaper tickets (7%), priority booking (6%) and priority seating (6%).

The use of differential pricing as a mechanism for attracting new audiences is a rather rarer strategy. Just 20% of respondents offer special discounts or offers for new customers. Those that have experimented have been focused on attracting younger audiences.

Chart 11 Loyalty incentives %





## Case Study **Eden Cinemas, St Julian (Malta)**

Eden is a well-established cinema in Malta, with 26 years in the business and is the market leader on the island. The cinema has 13 screens, all equipped with digital projection and 5.1 surround sound, and including its flagship Screen 16 with 710 seats.

General Manager Carinzia Camilleri said Eden recognised the need for fresh approaches to audience development to take on a growing range of challenges, including Netflix and piracy problems, made worse by the sometimes slow arrival of some blockbusters to Malta. “If you want to get people into the cinema, particularly for artistic movies, you have to be very creative,” she said.

A major digital and data strategy began in 2011 with new software, which allowed the cinema to start building a client database as well as selling cinema tickets online. After a few years, Eden recognised that this software was not keeping up with the changing audience requirements and included inefficient processes, such as sending out newsletters to the whole database, irrelevant to their preferences or previous purchase trends. This resulted in a high number of unopened newsletters and even led to some customers unsubscribing.

A big upgrade came in 2017, when a decision was taken to change to a new software and data system, mainly because the previous system was too slow and too primitive to handle the ambitious plans for growth and development. The new software was called Admit One and the investment was approximately €35,000 including hardware.

The investment was certainly about grasping opportunities, but it was also about accepting the realities of a changing audience base. “People are much less patient nowadays and they expect a quick and effortless service. Social media has changed the way a business can market itself and also introduced a new way of how clients can complain and

cause damage to a business reputation. Nowadays businesses have more pressure to deliver a superior service hence our decision to change our operating software”.

She said the costs involved were “substantial” since new software also required the replacement of hardware to cater for a higher level of data as well as a heavier operating system. Among the critical new features that the software provided was an improved electronic Loyalty Card and targeted marketing via newsletters. Apart from rewarding their loyal clientele and attracting new ones the loyalty card enabled them to segment their audience along a variety of lines, from age, gender, past purchases, etc. Even though this project is still in its early stages to be able to measure its success they have seen good early returns, not least in targeted newsletters, which have proved more effective in attracting audiences and ‘drastically reducing the number of people unsubscribing.

They are also working on developing the purchase of food and drinks online, which can be then collected by clients via a “fast-track station” on site. Eden hopes to be able to launch this new service in the middle of 2019.

Amongst other events and activities, Eden has launched a CineMum programme, giving very young children their very first taste of the cinema experience. The aim was to instigate a love for cinema from an early age, while targeting parents for other events and movies while on site. The programme itself, based on reduced ticket prices, was an investment in the future rather than highly profitable but nevertheless well attended and highly enjoyed by all.

Eden’s General Manager said the benefits of various projects they launched in 2018 were now noticeable and the company has enjoyed its best October in a decade, followed by the best November in eight years.



## Case Study **Yorck Kinogruppe, Berlin** (Germany)

Yorck can trace its history back to the 1970s and has steadily expanded to become the German capital's largest independent operator with 14 cinemas and one outdoor venue.

Its growth has been built around cinemas with a strong sense of community and a very personal touch to its services. In some respects, the investments it has made in digital data management and analytics is an extension of the same audience-centred approach that has helped the cinema chain thrive throughout its history.

According to Yorck's Head of Marketing Daniel Sibbers, the heart of the company is still those strong local relationships with customers and a commitment to great curated programming.

Human interaction remains essential to the operation of a successful cinema, he said. But the digital age has thrown up pressing concerns that require new responses, he suggested, and the challenge is not just about the survival and growth of individual venues, it is for the future of independent European cinema.

Cinema needs to win and keep winning the battle for time from an audience that has become much more demanding. But audience demand has, and still is changing, he said. Audiences still expect the personal touch but they

also expect the same kind of instant and personal gratification that they get from every other form of entertainment and media.

It is essential now to be able to understand audience demand in a more structured and informed way. Sibbers said he believes the core cinematic product remains strong but that the audience has become deeply fragmented. "There might be 15 films available in a week but 13 will be irrelevant to individual audience members." The trick, he suggested is connecting the right customer to the right films – and that meant more efficient and targeted marketing, through different versions of newsletters, for example.

Using data to identify and target potential audiences has become much more sophisticated and accurate.

Sibbers admitted that the results sometimes challenged presumptions about audience taste. And "segmentation" of the audience opened up unexpected areas of demand. He offered the example of hit 2018 release *Gundermann*, a story of an East German singer and writer, whose successful run was boosted by special event screening matinees of related work that attracted strong attendances.

It has worked closely with Movio, sharing valuable workshops and coaching to get the most from the system. But





© Adrian Schulz

Yorck has also had to upgrade its existing data management system to make sure it gets the most from its Movio investment.

The total investment, he suggested, would be in the “high six figures” but he said total costs of ownership had to take into account more than the initial cost of software itself.

He said changes of system did offer serious challenges that uncovered unexpected issues around technology, data and metadata. Issues include:

- Staff time and training
- Access to technical expertise
- Potential need for hardware upgrades and other software integration
- Travel to conferences and workshops
- Data management, including privacy
- Legal costs

Different venues would have issues that were purely local, he said, but there was room for collaboration. But Sibbers is convinced the additional value that will be created in the long term makes it a smart investment.

The potential of Movio was realised through collaborative work on loyalty programmes with the UK’s Curzon and Picturehouse networks. Cooperation revealed opportunities beyond those immediately expected.

The challenge for the industry was growing for every venue, he suggested, and there were synergies to be exploited, including shared software costs, knowledge and know-how and potentially shared processes.

Each individual cinema still tends to write their own synopses for their programmes and brochures but there were options for efficient sharing.

Sibbers said the interesting point about data is that it does not undermine personal relationships but can enhance them by understanding more about their tastes and habits. And knowing more about the proven habits of audiences does not lead to lazier programming but actually gives confidence to riskier decisions.



## Case Study **Kino Europa, Zagreb** (Croatia)

Kino Europa is one of Croatia's most beautiful venues, dating back to the 1920s, and plays an important role in the country's cinematic development, not least as host to the Zagreb Film Festival. It is a traditional venue with a very modern approach to audience development, creating a data management system that fits the needs of a changing market and with the flexibility to handle a wide range of business needs.

Cinema head Hrvoje Laurenta has overseen the building of a bespoke system that is geared to the needs of his businesses, and is able to adapt and change. He said that data was "precious" and needed to be recognised as such by business users. "You can never be 100% sure. There are always surprises".

He suggested that instinct was no longer a sound basis for deciding policy and its value would continue to fall because of changes in consumer behaviour. Even the best analytical tools struggle to keep up with the pace of change, he suggested. "Today, audience demand is not like the sea, which takes time to heat up and cool down, it is like the air, which can change rapidly."

He offered the example of Netflix: "In Croatia, there was six months when everyone I knew was taking a subscription but, six months later, I knew no one who still subscribed."

Audience analytics allowed the cinema to see the turning points in taste and behaviour and to react quickly and decisively. He said analytical tools were not a means to simply measure consumer behaviour, it was a means of getting to know audiences.

The sources of knowledge came from a variety of places. In social media terms, for example, he said Facebook, Instagram, Twitter and Snapchat were all popular in Croatia and each added new insights. "Social media is a battlefield with many fronts," he suggested. He said Facebook was the most useful, nothing that paid ads on the platform had been effective in targeting different audiences, offering a good picture of what worked well at any given time, and how those trends evolved and changed over time.

He suggested the greatest benefits from audience data came when businesses implemented a change of culture, becoming a knowledge-centred enterprise.







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Cinemas tended to be more resistant to change than some other businesses, which he felt owed something to a belief that more data could lead to following, rather than leading, audience demand and taking less risky, or adventurous decisions in programming.

Laurenta said that in reality, the opposite was true: “We don’t talk about risk, we talk about investment and what we find is that data shows us that people are sometimes more willing to try things than we imagine based on our own feelings.”

There was now concrete evidence, he suggested, that older audiences were much more open to queer cinema than he would have imagined. Equally, myths about students and younger audiences being unwilling to watch longer and more complex films had been shown to be untrue.

Those insights could be used to change the programme but often its benefit was in adapting screenings to the known habits of audiences. Timings could be sharply focused on a much better understood potential audience.

Financing a data-driven company was partly helped by reducing spending on tools, which he said were not relevant for today’s audience. Chief among those was the traditional printed programme booklets.

The cinema estimates that with design, printing and distribution of four booklets a month, the total cost was around €5,600.

Laurenta says the return on that investment is questionable: “Booklets are not very targeted way of promotion. I don’t know who is taking them at any particular distribution point. And 2500 prints doesn’t mean 2,500 readers. Lots of them end up in garbage. They are a one-dimensional tool. You can read but not comment or easily forward content.” By contrast, for €2,000, he suggests he might reach at least 40,000 people and can get 100,000 reads. “I can target each post to very specific audience.”

“An example would be French romantic comedy, where I can target a females, over 30, living in Zagreb, who know French language, and like France, and who like both romantic comedies and my cinema.” He said effective digital marketing can go “mini viral” with a lot of shares and comments.

# Chapter Eight Targeting Audiences

**Traditional methods for reaching new audiences have been overtaken in importance by digital tools in recent years but they clearly remain an important part of the service for the majority of cinemas.**

Almost two thirds of respondents (64%) still use print marketing, such as brochures and almost a quarter run postal campaigns. In some cases, such established measures are used in the absence of digital alternatives but for most they still retain a certain marketing power that is valued by audiences. Another effective model remains partnerships with community organisations and businesses to promote the programme or specific events. The Hyde Park Picture House in Leeds in the UK, for example, says it has been working with community groups as means to reach LGBTQ and particularly audiences from ethnic minorities.

Print, post and partnerships are often part of a broad audience marketing agenda alongside digital and online tools. Both drive word of mouth in different ways and attract different segments of the market.

These methods may remain effective when cinemas are generally serving older audiences, but they may struggle to attract the younger people needed for long-term stability and growth.

The evidence of the survey is that the emphasis of marketing has shifted with social media becoming the most important tool.

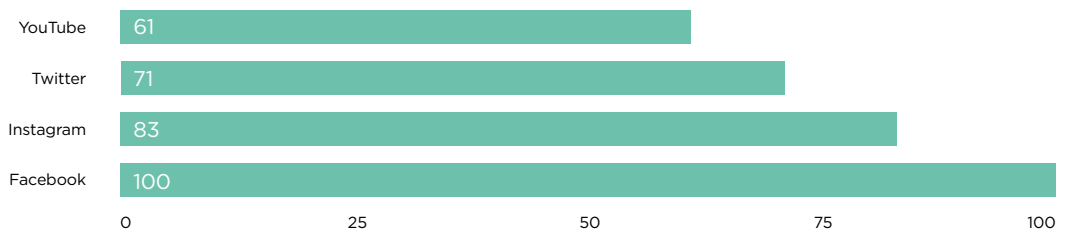
A venue’s own social media page is seen as a key marketing tool by almost 80% of respondents. Online marketing has also narrowly surpassed print, cited by 72% of respondents (compared to 64% for print). Paid social media marketing, particularly through Facebook, is used by 57% of respondents as a tool for targeting specific sections of the potential audience. More than half (53%) use online and social media to promote individual films to target audiences.

Facebook is cited by the vast majority as the most important tool and has become thoroughly integrated into a large majority of media strategies.

The social media giant is the number one service in all European countries with a 77% market share and 375 million users and has a proven reach across all demographics. The ubiquity of mobile phones is also driving social media use and effective, fast reach to new audiences.

The mixed media approach to marketing is now fairly established with 43% reporting that they had not changed the way they target audiences. That number is the same as those who have changed approach in the last three years, although only 15% in the last 12 months.

Chart 12 Super-Users analytics %





***“We have print magazines for cultural spaces, restaurants and bars, and Facebook for specific interests and content.”***

That may reflect that social media has been around for a significant period of time, with the number one tool, Facebook, celebrating its 15th birthday in 2019.

Those cinemas that say they have changed have mainly focused on shifting the balance from print to digital, with the benefits of gathering data for more targeted marketing high on the agenda. In some cases, print products have been dropped to help fund digital tools that can generate more valuable data. The use of paid social media marketing has been a stronger part of the mix too.

There are a small number of examples of cinemas looking at other social media platforms as a rival to Facebook in strategic thinking, mainly Instagram, which is believed to have a better reach to younger audiences in some areas. Cinema Paradiso in St. Pölten, Austria has been sending a weekly programme by Whatsapp.

The Super-Users group is very strongly focused on the benefits of social media marketing. All say that social media analytics is important to their understanding of audiences with more than 70% calling it ‘very important’ or essential.



## Case Study **Fyrisbiografen, Uppsala** (Sweden)

The two-screen Fyrisbiografen was established in 1911 and run for a century as a family business in Sweden's fourth biggest city. New owners took over six years ago and realised the need for a major regeneration.

The cinema had been in decline for a decade and its audience was old with little appeal to younger generations. As a not-for-profit venue, the issue was not about revenues, according to chairman Olle Agebro: "We wanted to improve the audience experience and to build a passion for life-changing films among more people."

As a small business with three full-time staff and 50 volunteers, the venue decided it needed help and successfully applied for a grant from the Swedish Film Institute for around €25K to hire a consultancy to develop a strategy. The consultant, Cybercom, is more used to working on large-scale projects with major telecoms, industrial and public sector bodies but Agebro said they had a strong feel for film and for what Fyrisbiografen was trying to achieve in its audience strategy.

The work opened up a series of questions that became recognised as practical opportunities but the critical point was a change of business culture that would reach all of the staff and volunteers.

"We looked at lots of business models and realised we needed to think like a digital start-up and much of the work was not about systems but about human relationships. Among the improvements made was in creating consistency about the way that the staff interacted with audiences. One of the immediate problems, for example, was an old-fashioned box office with a glass window between the ticket sales people and customers. Removing the glass facilitated real conversations and the cinema began to ensure that those conversations encouraged dialogue and feedback. "It was important that audiences felt welcome and respected," said Agebro. It was essential to increase numbers based on quality and substance that could drive new audiences through word of mouth and return visits. But Agebro said the cinema wanted to check the value of those perception changes with some science.







The need for ‘data points’ to test assumptions was “obvious”, he suggested and in looking at startups in the digital world, there was a strong sense that the key factor was success was best achieved by data-led businesses in a knowledge economy. The consultancy recommended some changes to systems. The cinema changed its ticketing software from ‘Chaplin’, which it had used since the 1990s to a new service called Veezi. The new system made selecting and booking a film considerably easier.

“Some of our visitors had to click through 20 steps before they successfully managed to book a ticket, whereas today a typical visitor needs only three clicks to have their ticket in their cellphone.” The social media activity improved too. Use of Google Analytics and Facebook is well established but its use has become smarter.

One key tool has been online trailers on social media. The time spent watching a trailer can be a strong indicator of likely interest and make targeting easier. Understanding and deepening interaction has also been a matter of observation, as much as digital data. Olle spent time in the foyer as the business developed, watching how audiences were using the cinema.

Segmenting the audience into target groups has been an essential part of the work and there are valuable tools now to help. For marketing, it is possible to find “ambassadors” and influencers in particular groups, and to work with businesses and organisations that appeal to the target groups. Among the more original concepts was Knitting Cinema, targeting a particularly female audience interested in both knitting and arthouse films. They were an easy group to target, with advertising placed in shops for wool.

The experience itself involved turning up the lights in screenings, so that it was bright enough for knitters. “It is a very niche audience but we fill the seats at every screening, helped by really strong word of mouth.”

The investment in consultancy and the actions taken since seems to be paying off in terms of audience numbers, with a 50% increase on the 2016 figure before the change

(from 25,000 visitors to 33,000). Those figures are unlikely to grow at such a fast pace, not least because of factors that are beyond the control of any cinema, such as the quality of releases. But the Uppsala experience points to the virtue of using audience knowledge to control what can be controlled. That is a team effort. Investments in valuable data can be small in monetary terms and does scale down to smaller businesses.

The big factor is not upfront costs but time, he suggested. Time is a precious commodity in smaller cinemas and it needs to be used wisely. What matters is a business culture in which everyone is engaged.



Evelyne Gebhardt (MEP), Olle Agebro and Abderrahmane Sissako

# Chapter Nine Conclusions

**This report demonstrates that there are big gaps in terms of development of data analytics. There is no common understanding of the field, which is perhaps unsurprising given that it is still an emerging area of business.**

There is one vital area of certainty that covers the vast majority of network members. Cinemas know that audience data is going to play a key role in a fast-changing world.

Every independent cinema faces the same direct challenges in legal and illegal streaming in homes and from the ever-expanding competition for consumer time. Some see it as an existential threat. Among the most telling responses to the questionnaire are that 71% believe that the relationship between cinema and audience is changing and that 94% see better understanding of those audiences as key to their business strategies.

There is a clear need and desire to find new ways to engage audiences because of the growing competition for consumer time, particularly among younger people. A recurring theme in the case studies is that the expectations of the 'net-native' young audience for instant gratification is now infecting all age groups. The inclination to queue at the box office, wait for the big films, or to spend time looking for entertainment appears to be sliding out of the culture. Even cinephiles want wonderful curation with the highest standards of convenience.

The competition for consumer time grows stronger every day and audience analytics in the network seems to be driven by a sense of necessity, which is always a stronger motive to invest than an optimistic gamble on future demand.

The challenge for Europa Cinemas is how to transform that general sense of need into specific actions, relevant to the different needs of cinemas and affordable to all. The survey suggests that most venues are thinking about making investments in two to three years' time, so there is a timetable for action that makes sense.

An important distinction needs to be made in that role between helping members take advantage of existing options and research and development (R&D) to develop the best options for the industry.

It is highly likely that the data analytics field will be very different in two- or three-year's time than today, given the speed of technology growth, and it is essential to offer a shared understanding of those changes. From the survey, the

case studies and the meetings of the Innovation Group, it seems clear that the networks role needs to focus on a set of key priorities.

## The basics

The first step in creating a viable strategy for the network is ensuring that members are on the same page in understanding these emerging fields.

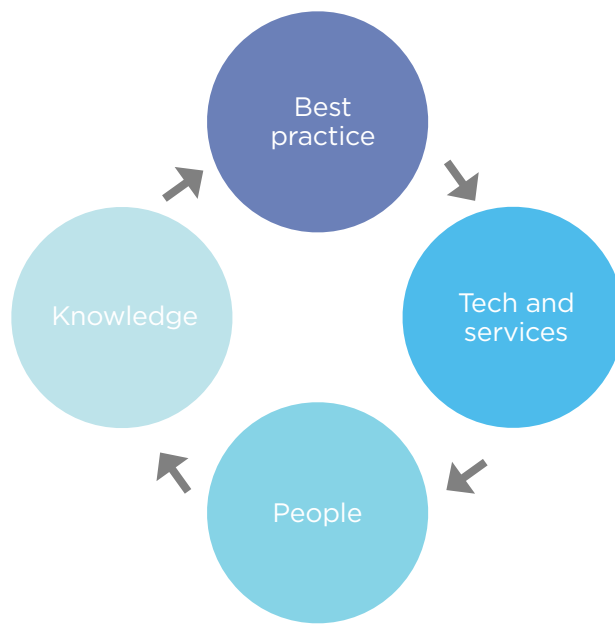
Meeting at the 2019 Berlinale, the Europa Cinemas Innovation Group raised valid concerns about how different respondents were interpreting the questions in the survey. A one-screen cinema, it was suggested, may have a limited knowledge of Customer Relationship Management systems. The responses from some smaller cinemas reasonably asked how far new trends in data analytics were relevant to their business. The initial draft of this study reported the sometimes quite high investments in systems and software paid by some members. Those numbers, however, can be misleading without specific context and have been taken out.

Future workshops and case studies may indeed include a thorough assessment of costs but, at this stage, it is more important to focus on value than cost.

Data analysis in a changing market may be as much about mindset as specific technologies. Data analytics is essentially about turning stronger audience engagement into business value and what matters most, as the case studies demonstrate, is informed business strategies around clear goals. So, the first task for the network then is partly to harmonise understanding among members of the value of data analytics.

The network does have some big advantages in that there are members, which have actively embraced new opportunities and have been willing to honestly and openly share their experiences. This report is centred on those pioneers through case studies and the Super-Users survey.

There are other advantages. Other industries are often a long way ahead of independent European cinemas in testing and developing analytics, offering strong examples of success and, very importantly failure. But given the recognised



importance of the work, the network might consider breaking its work into four distinct areas:

### **Knowledge**

We are living in a Knowledge Economy, for better or worse, in which data and intelligence is playing an ever-greater role.

To an extent that economy has favoured scale. The giants of global entertainment, such as Netflix, Facebook and Amazon are all reliant on Big Data and the algorithms that can help them service (or manipulate) audience demand. Nonetheless, data analytics are important for all businesses looking to compete in a world where competition for consumer time, particularly for younger audiences requires some degree of intervention. And data analytics does scale down, as the wide use of social media analytics demonstrates.

This report suggests that different scales of cinema will have different needs. It may never be necessary for an individual small venue to have a complex CRM system. On the other hand, every venue has the potential to find the level of audience analytics that can meet their specific needs. And, again, those needs are likely to grow as competition for consumer time grows and audiences become more demanding.

The case studies here suggest that investment in analytics software and systems can reveal a range of new opportunities.

But all investment needs to be part of a strategy and all strategy needs to be built on knowledge.

For a network, the logical approach to the Knowledge Economy is collaboration, testing and sharing and the Innovation Group in Berlin suggested ways in which that could, and should, happen.

— A basic knowledge base: Ensuring everyone has the same basic understanding of the key concepts, terms and developments in data analytics.

— Product and market intelligence: Regularly updated access to information on developments in the sector and the way that the market beyond the network is evolving.

— Best practice sharing: Shared knowledge on approaches that are working across the sector (See below).

— Performance data: Shared knowledge of how projects involving different cinemas are working.

— Regular case studies: Real examples from different sizes of cinema that give practical context to developments.

All of the above might be best achieved through workshops, reports, newsletters and conferences. There needs to be a framework of understanding that means that every member can talk about analytics in the same way.

### **Best Practice**

The development of best practices in new areas of business and technology generally come through serendipity, duplication and trial and error.

Experimentation is important and learning from failure is at least as important as copying success.

Data analytics is not an easy field to test, not least because there is no one-size-fits-all approach, relevant to all sizes of cinema and there may be investments that become

necessary for large chains in big cities that will never scale down to a single-screen venue.

There are other complicating factors, not least the availability of specialist companies. Potential partners in technology and business strategy are generally concentrated in bigger cities and interested in larger businesses.

A still more compelling issue is that Europa Cinemas members, particularly smaller venues, have limited resources for taking risks, yet experimentation is where value will most be found.

The network has a number of actions it can take.

— Case studies: Proven case studies are essential to helping members understand the potential of developments. On the other hand, studies tend to be a snapshot of actions at a given time. It would be useful to follow case studies over a longer period of time and follow-up and questions are important, perhaps through workshops.

— Best practice pilots: There is a strong case for supporting pilot projects to test the value of analytics developments and data strategies. Such pilot has been used in other European projects, such as the Tide Experiment. There is a good case for Europa Cinemas to support a similar scheme for experimentation with transparent results shared with the network as a whole.

— Sharing: The results of experimentation are best shared through the existing provision of workshops and labs, giving network members the opportunity to examine the value of the results and their relevance to their own business. There

is a good argument for specific localised workshops that can explore the shared needs of cinemas in regions which are under-served by analytics companies.

— Toolkit: Having established best-practice models, it would be good to develop toolkits to be employed at other venues. The toolkit may include simple guides to development, methods of measurement, technology and business data and practical examples to be followed.

### Software and service development

Data analytics tailored for the needs of the independent cinema sector are still at an early stage. Most software and services companies have often chosen more lucrative and generally fewer complex areas of business to build their products.

The technology companies dipping their toes into the water with cinemas are not necessarily at a stage where they really understand the business needs of the cinema sector. There is a history of software companies offering off-the-shelf 'solutions' to business problems that do not live up to the hype. In this field, there are issues around compatibility of software with existing systems and hardware to be considered.

The case studies make clear that work in this field are not simply a matter of 'plug and play' but need informed strategies to succeed. Fortunately, some of the key companies that have been looking to work with the network are aware that they need to tailor their services to the needs of the sector







and have been very willing to listen and learn to develop a product that is relevant, scalable and at the right price.

Individual smaller cinemas outside the major cities may be an unattractive prospect for such companies but collected together as a network might generate more interest.

The role of the network is complicated in supporting the development of services. It is not a company with purchasing power, able to exploit economies of scale. On the other hand, it might have a role in helping those looking to work with network members by offering all interested parties' information on the requirements of members. That may extend to pitching workshops for members, or groups of members.

The important point is that network members are able to buy and negotiate from a position of confidence and that external developers work on products and processes that offer the best value for cinemas.

### **Business strategy**

This field is evolving fast, meaning that data strategies and software might look very different in two years' time than today. Europa Cinemas advice needs to stay up to speed with the pace of change, so social media, data research and shared intelligence is going to be critical. This report may act as a useful foundation document to be updated.

Investment in data collection, analytics and management has the virtue of demonstrating higher returns the deeper it is integrated into the general business plans. The richer the

data, the higher the potential of returns. That richness is not necessarily about financial cost and the case studies offer examples of the value of mastering basic social media analytics and mixing it with a range of other tactics and tools. These kinds of digital tools require a change of thinking that can be disruptive to traditional cinema culture. The use of data to build new services and smarter marketing is not in the core skillset of many cinema owners and there are natural, and realistic concerns about costs, skills and return on investment.

What emerges most strongly from this survey is an acceptance of the value of audience data but doubts about whether the benefits will outweigh the costs.

Europa Cinemas can play a big role in building strategic skills to best manage change and to understand the real underlying costs.

Skills and staffing emerge from this report as an area where information is lacking. Like many areas of business in the digital era, there is a great deal of hidden complexity behind seemingly simple processes.

Europa Cinemas members might find themselves needing support on technical, business and data management skills and on developing specialist skills. The experiences and knowledge within the network need to be harnessed to give confidence and a sense of direction to all.

## Europa Cinemas

What seems to be holding back investment is in very large part about knowledge and that is where Europa Cinemas has been at its strongest in recent years. The network has given a powerful lead to the sector in many areas of innovation and change, acting as a mechanism for sharing the intelligence of a connected community and helping turn it into value at a local level.

Europa Cinemas has already played an essential role in stressing the potential for new kinds of audience development, using the tools now widely available in the digital world.

It can play an essential role in the transition to a period of far greater attention on audience data – and the report suggests an eagerness among members for the network to help. In a fast-changing world, where digital disruption and new opportunities arrive at alarming speed, the overwhelmingly small-and-medium-sized businesses (SMEs) that make up the cinema world need to stay informed.

The survey suggests that network conferences and events are now the second-most important source of audience, business and market intelligence (after box-office numbers). 97% say they are interested in reports on innovation in the area, and 92% in a database. There is almost no difference in size of venue or geographic location in those numbers.

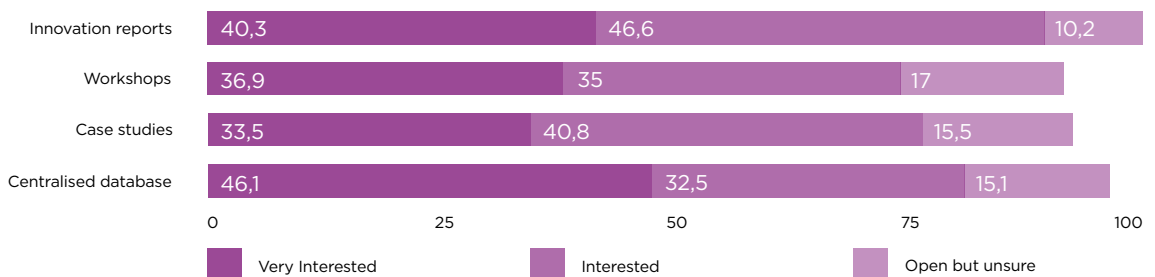
There is a little clearer divide about the value of workshops. Among venues with four screens or more, 50% say they are ‘very interested’ and 82% are at least interested and 95% at least open to the idea. Those numbers go down to 31% very interested, 64% interested and 85% open among one-screen venues (and 37% very interested, 76% interested and 90% open among two-to-three screen venues).

There are areas where shared knowledge is important. A number of venues, for example, pointed to the complexity of European data privacy laws as an issue.

The value of a collective and collaborative approach is recognised but regular interaction with colleagues on a systematic basis outside the network varies. Just 32% share audience data with other cinemas and 17% share marketing analysis. Some cinemas do sometimes collaborate strongly with colleagues from the same city (with Prague a good example) and from the same country (Bulgaria seems to be particularly active.) But data sharing benefits from the widest possible international reach because most of the challenges are shared. One surprise of the survey is that the differences in terms of cinema size and geography are fairly limited, when compared to other areas of innovation.

There is a very strong shared sense of the need to understand and implement audience development plans but fairly limited specific in-depth knowledge. A known need and a knowledge gap would seem to create the perfect opportunity for Europa Cinemas to use its considerable experience to support developments in the network.

Chart 13 Europa Cinemas support %



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# Author of The Survey **Michael Gubbins**

Michael Gubbins is an analyst, journalist and consultant, who has been working in the film and media sector for 15 years.

He has a long association with Europa Cinemas, chairing conferences since 2004 and authoring a number of reports on change in European exhibition.

Gubbins was editor of titles, including Screen International and Screen Daily, and Music Week in a 25-year career in newspapers and magazines.

He was also chair of regional screen agency Ffilm Cymru Wales until 2019.

He writes influential reports on the changing media and cultural environment in Europe; and is a sought-after and experienced moderator, keynote speaker and organiser of conferences, Think Tanks and events around the world.







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