BEYOND 2020

Summit 2015

White Paper

For the **Entertainment Industry**

Contents

white paper - *noun*

A report that informs readers about one or more industry relevant issues and presents a collective philosophy and set of recommendations against them.

Its purpose is to create awareness and inspire action, to encourage open dialogue and an exchange of information and ideas and to help readers understand issues, solve problems and make informed decisions.

Beyond 2020

The entertainment industry has moved on enormously in recent years. The changing style and appetite for new forms, the shape and needs of different audience sectors, the disruption and pace of technology and the growth of new markets and competitive forces, have all had a dramatic effect.

During the next five+ years, one thing is certain, **change will never be this slow again.** Gaining clarity on what lies ahead and ensuring that informed choices and decisions are made, will be critical to both survival and success.

We must also acknowledge that the future is inherently uncertain, and part of our role is to seek to understand and examine this uncertainty, in structured ways.

This helps to define our approach, enabling us to create emergent images of a possible future, with informed recommendations.

Respecting this and provoked by increasing calls from within the industry to be more proactive, a unique Summit was created to bring together industry leaders, subject matter experts and opinion formers.

This carefully selected **'think tank'** was tasked with;

- reviewing the trends that market experts predict will have the most impact on the industry in the next 5+ years
- identifying key areas already effected and early strategies for managing these
- exploring the potential challenges and opportunities that lie ahead and developing informed responses
- setting the direction and priorities for the future, with clear recommendations and potentially radical ideas

This White Paper is the output of the discussion, intended as a relevant and timely advisory for those connected to the entertainment industry.

Its value is the combination of research, insights, experiences and ideas that come from open and often challenging discussion. It explores the patterns and themes that emerge through the noise, with recurring clarity and selects those that are both relevant to the wider industry, and critically useful for specific industry areas to consider their own position for response.

Focused on the higher cause of the future of entertainment, it deliberately represents a collective reflection, not necessarily the views of the specific organisations represented.

The themes and recommendations addressed in this paper include;

- Reinstating a duty of care to customers
- Protecting the core value of entertainment
- Developing a technology capability
- Reframing traditional mindsets and understanding

This is a unique publication that is intended to both inform and inspire. It is faithful to the findings in order to;

- **guide** industry leaders in prioritisation and decision making
- **engage** early ambassadors to commit to action
- **support** the wider industry in becoming better prepared for survival and success
- **embed** belief not simply in 'what is', but in 'what might be'.

MCLTD is a strategic consultancy that helps leaders and opinion formers identify a shared purpose and develop a collective response to industry challenges and opportunities. These include relevant recommendations, game-changing ideas, proposed future working models and collective mindsets. We welcome ongoing feedback and conversation to sustain progressive dialogue and action within and across different industry sectors.

Martin Clarkson
Partner - MCLTD

Mel Cochran
Partner - MCLTD

Anything is possible

Fundamental change and disruption is an intrinsic part of an industry's ability to remain relevant and sustain success.

Reflecting this, contributors were encouraged to step away from their day to day activity and consider the wider view of entertainment with an 'anything is possible' mindset and approach. This enabled a focus on a shared sense of purpose and a more creative, unrestricted and collectively meaningful response to the common challenges and opportunities facing the industry. To ensure that the outputs of the discussion carried impact, there was an additional commitment to begin putting the agreed recommendations into practice.

using inherent creativity to recognise, grasp and make the most of every opportunity is critical to achieving success

Alastair creamer – Eyes Wide Opened

In order to establish a meaningful context, the group looked at the industry through **three distinctive lenses.** This approach ensured that the recommendations made were informed by both 'what we know and what we've learned', alongside insights on how we can 'prepare for the unknown'.

The external lens:

The trends effecting our industry, that leading analysts have identified as having the greatest potential impact on the world of 2020 and beyond.

The internal lens:

The 'voice of the industry' in Europe and the US to allow burning questions to be asked and to capture existing experiences, insights and ideas to help shape a relevant response.

The 'what if' lens:

Deliberately provocative, often passionate, the 'what if' lens looks at topics that will challenge and disrupt the status quo. The aim is to uncover the pioneering ideas, alternative approaches, and honest dialogue necessary to unblock barriers, build momentum and create game-changing models with lasting impact.

Tomorrow belongs to the people who prepare for it today

Malcolm X

The future of arts & entertainment will be a global, participatory, tele-present, holographic, augmented reality, conducted on next-generation mobile smart phones and immersive screens, that engage new audiences in the ways they prefer to be reached and involved

The Furture of Arts and Entertainment 2020

The trends effecting our industry

Leading analysts have identified key trends that they believe will have the greatest, potential impact on the world of 2020 and beyond. Each trend has the potential to impact every industry across every market.

To help shape a collective response and set of recommendations, a **shortlist** of those most likely to impact the entertainment industry were selected, with specific questions formulated against each.

SHORTLIST

1. Demographic shifts and the audience needs of the future
2. Consumer influence and future customer expectations
3. Globalisation and emerging markets
4. The digital revolution and our technology capability
5. Disruptive forces and our ability to respond

1. Demographic shifts and the audience needs of the future

elderberry power and influence

The 50+ baby-boomer generation is currently the single biggest market sector in our history. They have retained their **health,** protected their **wealth** and have acquired more **time.**

This gives them a **unique triple currency** over other demographics and makes them particularly compatible with the entertainment industry.

The 'grey pound' gives them unprecedented power and influence as a dominant consumer group and research shows that engaging them will continue to be critical to success in the next three to ten years.

FACT

People aged 50-74 spend twice as much per year as the under 30's on theatre and cinema tickets...

Spending Power across Generations Report,
The Intergenerational Foundation. December 2012

The cinema industry has been quick to react, developing films that appeal to the older audience, and adapting the environment to provide a more memorable experience.

The Kings Speech cost just £10m, and has taken over £260m worldwide. Boutique cinema experiences like Curzon and Everyman theatres are taking 'grey' revenue from the bigger more established chains such as Odeon.

CASE STUDY

Setting the context - **The external lens**

Children of the new revolution

Cost is a significant barrier to young people attracted to the theatre. 72% of respondents to a young peoples survey, cited 'cost of ticket' as the main, or only barrier to attendance. Young people are more likely to try a different art form or venue, when the cost is perceived as reasonable.

Although young people have a proven appetite for new and different formats, it is felt that there is an insufficient representation of their views, at the broader industry level. As a result, there is an increasing mismatch between what they want and what most big players in the entertainment industry believe they should offer.

"The West End will always charge what the market will bear, and the truth is that there are plenty of older people with good incomes for whom it really doesn't matter if a theatre seat costs £30 or £50, or even £70. But this has real implications for the rest of us, and for the future of theatre... if its audience base is narrowing and not being replaced by younger theatregoers from a wide range of backgrounds – how long can it continue?"

Lyn Gardener, British theatre critic, writer and journalist – **The Guardian**

HOW DO WE CONTINUE TO ATTRACT AND RETAIN DIFFERENT AUDIENCES?

QUESTION

2. Consumer influence and future customer expectations

Globally, the size of the middle class could grow from **1.8bn** people to 3.2bn people by 2020, and to **4.9bn** by 2030. **85% of this growth comes from Asia,** with middle class spending forecast to triple by 2030. Future customers no longer *need* value due to their socio-economic status, but they want to be able to *choose* value based on their personal needs and preferences.

Empowered by the endless stream of on-line information, and the megathon of social media, consumers worldwide now expect more **personalised service.** They seek improved quality of life and ask for social responsibility from all economic players.

CONSUMER RATINGS are crucial in everything and are becoming the dominant marketing and advertising platforms of the future.

Younger audiences expect relevant and dynamic digital content from organisations and online communities that they follow and interact with. They expect entertainment venues and bodies to keep in touch with them, through regular contact and communication (at least once a week) and want readily available real-time online and mobile information to support booking their festival, theatre, sport and concert needs.

WHAT ARE FUTURE CUSTOMER EXPECTATIONS AND ARE WE READY FOR THESE?

QUESTION

3. Globalisation and emerging markets

Globalisation brings about shifts in economic power. The battle for top talent, markets, innovations, and information has gone global. Size doesn't matter, giants can fall overnight, and agile and innovative start-ups change the rules.

70% of world growth over the next few years **will come from emerging markets** with China and India accounting for 40% of that growth. 45% of Global **Fortune 500 companies will be based in emerging economies**

By 2025, China will build 10 new New York size cities. And by 2030, 1.3bn people will live in emerging market cities fuelling the creation of new transportation, infrastructure, social interaction and services.

Organisations and industry bodies looking for growth, need to be evaluating partnerships and acquisitions, that result in a greater exposure to these economies and cultures.

HOW CAN WE POSITION OURSELVES IN THIS NEW AND RAPIDLY CHANGING GLOBAL ENVIRONMENT?

QUESTION

4. The digital revolution and our technology capability

By 2020 50bn devices from watches, to medication and cars will be connected to the internet and collect personal data. **Our digital capability must be able to accommodate this transition.**

More than **1bn smartphones** were sold worldwide last year. One can now 3D print a car, a house, and even food.

By 2020, **China's e-commerce market** will be **larger** than those of the US, UK, Japan, Germany and France combined.

Digital platforms change the way we think about value, **Spotifys** music streaming has changed the benefit of owning assets to subscribing to a service instead.

CASE STUDY

HOW CAN WE SUCCESSFULLY EMBRACE AND ANTICIPATE DIGITAL TRANSFORMATION?

QUESTION

5. Disruptive forces and our ability to respond

The pace of change and shifting shapes of competition, require us to become **more agile, more proactive,** and **more focused** on developing a greater capability to respond to the unexpected and unknown.

The world's largest movie house, owns no cinemas... **Netflix.**
The most popular media owner, creates no content... **Facebook.**

Once iconic black-cabs defined London street scenes, just as Yellow cabs defined those of New York.

Since the arrival of **Uber** in 2011, traditional taxi fleets and their revenue have been severely disrupted.

Uber have expanded approximately tenfold over the past two years, from an estimated 300,000 rides in June 2013 to 3.5m in June 2015. Yellow cabs 'hail volume' has fallen by 2.1m during the same period.

Amazon has moved from being a big player in selling books to vertical control of entire sections of the industry.

Just 5 years ago Airbnb did not exist. Today more rooms are rented on the start-ups website than commercialised by any other company in the hotel industry.

ARE WE READY FOR THIS KIND OF DISRUPTION?

QUESTION

The voice of the industry

Drawing on research from entertainment bodies, studies of UK theatres and cinemas, insights from European industry forums, and direct Summit input, **the following significant industry challenges and opportunities were identified and explored.**

SIGNIFICANT

1. Understanding our customers.
2. Retaining an emotional connection
3. The changing commercial environment
4. Our technology capability
5. Defining 'entertainment'
6. Our approach and ways of working

1. Understanding our customers

Customers are looking for a **magical and memorable experience.** It is the responsibility of the industry to ensure they escort them on a journey that fulfills that expectation, not just engages them in a series of transactions and interventions.

Research shows that across the entertainment industry, the customer journey starts with a ticket, in whatever paper, electronic or digital form it takes. Everything from the initial decision to buy, to experiencing the entertainment they have chosen, should be inviting, easy and enjoyable.

Each ticket should therefore be seen as the gateway to the customer experience, not an isolated commodity.

Audience diversity is now common and should be embraced. There is increasing support for the concept that entertainment should be available to all and that we can learn as much as we can about adapting to suit others, by educating them on our specific entertainment experience

Today's customers are savvy. They expect recognition, not just reward. They seek transparency and value in all of their purchases.

The increasing cost of entertainment, the growth of secondary markets, the perceived decline in service excellence and the disconnected nature of on-line services, all serves to alienate and frustrate customers ... regardless of which audience group they are from ... **and they are starting to react.**

The emergence of social media provides a wide reaching sphere of influence for customers and impacts the choices and decisions of other consumers, in ways that traditional marketing and advertising no longer can. This shifts the power of influence and control from the hands of the industry, into those of the customer.

'Customers' are no longer limited to those that purchase tickets and visit entertainment venues. Increasingly, 'the customer' should now be seen as all those that the industry serves, including producers, potential investors, and internal employees.

Connecting with each customer group will be critical to both survival and success now and beyond 2020.

2. The emotional connection

The entertainment industry has a unique emotional connection with its customers. It prides itself on personal service and human engagement, in ways that go beyond the levels of customer service in other industry sectors.

This **'human element'** is a critical factor in the future of entertainment. It provides ongoing value to 'live' entertainment (in whatever future forms this takes) by providing emotional stimulus and connections, that other forms cannot replicate.

It is also the foundation for the customer journey, with each step contributing, either positively or negatively, to the customers overall experience – it is an innate human element that entertainment cannot be disconnected from.

In this world where any message can be crafted to any degree of perfection, the scarce commodity is now authenticity.

How people **personally connect** now matters more than ever before

Karl Schroder

The customer is always right!

Harry Gordon Selfridge

You go to the theatre with the ones you love

Delegate feedback
ETT Amsterdam, 2014

3. The changing commercial environment

Recent public deficit and changes in government, means that **funding in the Arts is declining.** This doesn't however preclude investment in entertainment through alternative channels.

Commercial and Corporate enterprises looking to benefit from downstream sales, provide investment in the form of Corporate Card Services, block seating, or sponsorship at shows, concerts and sporting events.

Traditional philanthropy and support networks will increasingly make donations to support their favoured cause.

Cities and communities are banding together to support the arts in their individual locales, generating local investment and interest.

Initiatives such as inner city regeneration or educational projects, generate funds via localised campaigns and grants such as National Lottery funding.

Alternative working models are emerging, creating different commercial scenarios.

The National Theatre of Scotland took the radical decision not to purchase, or lease, a venue to 'live in'. It exists entirely as a touring company, taking its award winning work wherever there is an audience to enjoy it. This enables it to enjoy huge commercial savings by not managing and maintaining a venue and stay true to its vision of creating theatre that is important, unforgettable and accessible to all across Scotland. In just a few years it has performed the length and breadth of Scotland from theatres, to village halls, tower blocks, forests, car parks and pubs. It has created over 200 new productions, performed in 250 locations and been seen by over a million people across four continents. It remains happily and profitably homeless.

CASE STUDY

4. Our technology capability

There is both a challenge and an opportunity associated with the rise of technology in this industry.

On the plus side, it enhances the customers experience by providing real-time information and on-line services.

For the industry, it reduces the cost of resourcing customer interactions. It also provides data that, if captured and used sensibly, provides the industry with an ability to engage in continuous dialogue with its audiences about what's working, what's not working and new ideas for products, services and improvements.

On the flip-side, the ever-increasing volume and complexity of data, means that wading through 'stuff' to retrieve information that is relevant and meaningful, becomes time consuming and unmanagable. At worst, data is collected and then simply stored, so that information that the customer has taken the time to contribute, is not used in ways that would benefit either them or the industry ... and is thus wastefully redundant.

The industry needs to strike a balance between the benefits and drawbacks associated with the rise in technology.

It needs to enhance the customer journey with the speed and real-time efficiency that on-line purchasing can bring, whilst investing in new approaches to collect and report 'smart data', 'counting what counts' for both the customer and the industry, to help tailor products and services more effectively.

5. Defining entertainment

Live entertainment no longer has boundaries and traditional models are being re-thought.

Theatre subsidised by the public purse (local authorities as well as Arts councils), sit alongside commercial, semi-professional and amateur theatre. There are increasing links to the film and TV industries, with productions evolving into international TV successes or commercially successful films.

Definitions of entertainment have been stretched beyond those used a generation ago. There has been a rise in large music and comedy festivals and in mixed entertainment festivals with a variety of themes, including cars, gardening, holidaying and food. Similarly, the increase in sports related competitions inspired by the majesty of the Olympics has created a huge variety of live and often televised entertainment offerings.

Increasingly the 'delivery' of entertainment has changed – experiments in digital broadcasting means that most live theatre and music can be streamed into local cinemas or 'big screen' gatherings. Productions now increasingly use alternative 'opportunistic venues' such as open fields, under railway arches, in disused containers and on street corners.

The definition of entertainment in the future will be heavily linked to...

Enjoyment – anytime, any place, anywhere.

6. Our approach and ways of working

The entertainment industry is unique, in that it has existed to date without real risk, threat or disruption. Technology has possibly been the biggest shift in its operations, but this was too often translated to doing the same thing (buying and selling tickets and communicating with customers) albeit, in new technology driven ways.

Change has been slow and largely industry controlled. Growth and development has been contained to established locations and practices in the West, with the US, UK and central Europe dominating. Audiences have been drawn largely from established customer bases with the means to pay, or from tourism. Funding, whilst not always easy to obtain, has been reliably forthcoming through a mix of public and private subsidy.

Without a challenging cause to provoke a real need to unite, the industry has allowed itself to grow up as a collection of separate bodies, organisations and companies acknowledging little strategic partnership or collaboration.

However, the rapidly increasing pace of change, the growth of **Google** and **Amazon** in related sectors, the rise of both consumerism and emerging markets and a growing belief that the industry is out-pricing itself and not always 'dealing straight' means that disruption is potentially imminent ... **and is forcing change.**

This will involve all those connected with the industry, developing a mindset for change and collectively committing to actions and behaviours against a shared purpose.

Harvey Goldsmith CBE

With an appetite for honest and open conversation, **the Summit welcomed thoughts from the legendary and visionary producer and promoter Harvey Goldsmith.**

Challenging the way in which the industry has evolved its relationship with its customers, quickly surfaced as a key topic for discussion. Honest insights and potentially disruptive suggestions for how the industry would benefit from reframing it's product and re-valuing its commercial relationships were then addressed.

The entertainment industry (as all industries) should have a duty of care to its customers which must reflect transparency and openness in its commercial dealings

With many feeling that the industry is out-pricing itself and not acting in the best interests of the customers, there is a new and growing movement to stop tickets being resold at vastly inflated prices.

In isolated incidences, progress has been made – a law was passed outlawing the re-sale of tickets for the Olympics and key sporting fixtures, including Wimbledon have now been nominated 'Crown Jewel' events and are legally governed. Could we consider the same for entertainment? Glastonbury is now linked to exclusive ticket-purchase ID, but this approach is far from being extended.

A worthwhile conclusion to this debate, will be a significant factor in the survival and success of the industry. It will include arguments for and against dynamic pricing, capping high costs charged for the biggest acts and most popular shows, the rise of subsidised or free tickets to generate interest and engage and educate younger audiences, and the limitation of the power and influence of the secondary markets.

LONDON - OCTOBER 2015

Beyond 2020

Against the preceding **external, internal** and **'what if'** scenarios, the **'Beyond 2020'** findings were shaped into a set of recommendations and respective actions.

They outline sound advice on what the industry must focus on to achieve success, including guidance on where future value will come from, where to focus effort and investment, what capabilities future teams will need ... and what values and behaviours will be most relevant and useful.

They are grouped under four key themes to support ongoing dialogue and decision making.

KEY THEMES

1. **Reinstate** a duty of care to our customers
2. **Protect** the core value of entertainment
3. **Develop** a technology capability
4. **Reframe** traditional mindsets and understanding

1. Reinstate a duty of care to our customers

Customers are at the heart of the entertainment industry. They are the reason entertainment exists and the most critical enabler to commercial and creative success.

As the industry has evolved, commercial priorities have risen to the surface and both technology and third party influences have begun to dominate the field.

The result is a lapse in the duty of care to the customer and a reduction in the ownership, control and influence of the industry from within.

To reinstate this duty of care to customers, the industry needs to;

- give decision making power back to the industry - artists, promotors and producers
- dramatically improve ticket distribution in line with customer needs not those of the secondary market
- implement regulation backed by legislation to enable fair pricing
- adopt to a 'duty of care' mindset and practices and make a stand against those who don't
- incentivise customers to support new talent to secure future forms of entertainment

CALL TO ACTION

Collaborate with those who are already practising a duty of care, to share best practise and provide a business case for change.

Explore alternatives such as the ID card system, that disables those operating outside the primary market.

Restrict secondary market relationships to those that support primary market - refund, resale and exchanges.

Partner with powerful newcomers and disrupters who already have visibility and a wide reach of distribution channels, to embed a duty of care into ongoing practices.

2. Protect the core value of entertainment

There is a huge pride and passion for what the industry has achieved over the years, including core elements which will remain critical to success in the future. The following unique attributes should be protected in future decision making, so that all ongoing activities, neither remove or dilute this part of the legacy.

- great quality and diversity of content
- an innovative and creative approach
- a willingness to be different, ambitious and to try new things
- a 'human element' across all platforms, which provides an emotional connection
- a unique entertainment-capability and talent in our people

CALL TO ACTION

Welcome new products and service areas such as experimental and immersive theatre and focus on leveraging funding for these with the same appetite given to the less-risky and established producers, artists, venues and shows.

Invest in training and development for employees at all levels of the industry with shared standards of excellence and greater opportunities for progression, diversification, reward and recognition.

Make the human element of entertainment a more formalised aspect of the offer, embedded into training and championed through marketing, communication and social media channels.

3. Develop a technology capability

Technology will remain one of the key drivers of change and disruption. To respond, the industry must now leverage all capability developed to date and urgently apply the learnings, to realise greater benefits moving forward. These include:

- Using existing data in better, smarter ways, capturing and sharing information that is relevant to making improvements or meaningful decisions
- Using the latest technology and new systems to support the distribution of tickets in a fairer and more transparent way
- Sharing data across different areas of the industry, to support collaboration
- Considering data as a 'conversation with the audience', providing feedback on issues and opportunities and providing insights into future customer needs and expectations
- Embracing digital communication and social media opportunities, as the link to future audiences

CALL TO ACTION

Identify a central, all sector resource to establish initial benchmarks and to provide a safe haven for capturing and sharing data going forward.

Collect data in a consistent way with regular and annual reporting.

Invest in new systems and training where necessary, to stay relevant.

Seek to understand future customer technology capabilities and digital preferences, to remain relevant alongside other industries.

4. Reframe traditional mindsets and understanding

The Industry has reached a tipping point. It must now become more disruptive, expose itself and respond to the risks it faces and accept a greater pace of change including;

- Becoming nimble and agile again
- Being proactive rather than reactive towards customer needs
- Understanding the different customer and commercial opportunities
- Staying relevant in a changing world, with a mindset for change
- Taking greater risk, enabled by better insights and experiential learnings
- Developing shared objectives and greater collaboration

CALL TO ACTION

Reframe what we mean by 'customer,' to include producers, venues and employees alongside existing customer groups.

Reframe what we mean by 'subsidy,' to include revenue from government, philanthropists, communities and key initiatives.

Reframe what we mean by 'entertainment,' to include all 'magical and memorable experiences' desired by customers, any time, any place, anywhere.

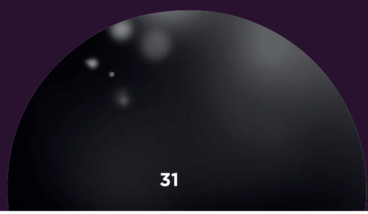
Create strategic partnerships that will support collaboration and decision making.

Develop a clear and compelling purpose for the industry, with aligned values to guide direction and decision making.

Learnings

The entertainment industry has reached a tipping point.

Having largely evolved without fundamental change or disruption, **it now faces pressure to change.**



Informed responses to this, must begin by **reinstating a duty of care to customers** - meeting the needs of different audiences in ways that are relevant and meaningful to them with a commitment to fair and transparent pricing at all levels.

The core value of entertainment must remain intact to preserve the great quality and diversity of content across multiple formats. The inherent innovative approach and the 'human element' that attracts and retains customers should be protected with meaningful investment made in the areas of both product and people development, to leverage the unique creative capability of the industry moving forward.

Technology will remain a key driver of change and disruption and therefore embracing new communication and social media opportunities as the link to future audiences, alongside getting smarter at using and sharing existing data, will be crucially important.

Finally, **the industry needs a clear purpose and direction** if it is to evolve and survive. A mindset for change and risk, enabled by better insights and collaborative partnerships will enable those across the industry to reframe how they see their customers and commercial opportunities and expose the boundaries of entertainment to new and radical ideas that will enable both survival and success beyond 2020.

Benefits

While the Summit recommendations do not guarantee the industry's survival and success; the adoption of one or more of them gives it the potential for both, with connected benefits for all stakeholders;

For our **customers...**	For our **businesses...**
a duty of care to all customers	be part of a unified more integrated industry
greater personalisation and choice	retain the 'value' of our tickets
any time, anywhere, any place purchasing	operate in a primary not a secondary market
consistent magical and memorable experiences	release the untapped knowledge in our data
opportunity for involvement	attract and retain more customers
	attract and retain more talent

For our **investors...**	For our **people/teams...**
greater sponsorship and advertising	greater satisfaction and reward
greater commercial benefits and tax relief	a unique opportunity for development
	a sense of pride and purpose

Music, Media and the Arts will remain powerful tools for bridging cultures, sharing diverse values and perspectives, addressing conflict, educating and ultimately creating new visions for a more evolved and peaceful civilisation

The Future of Arts and Entertainment 2020.

Moving forward

The 2015 Summit brought together industry leaders and opinion formers, to explore the key challenges and opportunities facing the entertainment industry.

It has delivered;

- **a clear set of recommendations** with a call to action for others to follow
- **a sense of momentum** that will help drive actions and behavioural change
- **a solid foundation** upon which progress can be monitored, learnings shared and issues resolved
- **an early sense of purpose** that will help guide future direction and decision making

To build on this, participation in The 2016 Summit is now encouraged to ensure;

- quick wins and initial learnings are captured, measured and shared
- new challenges and opportunities are addressed
- the approach, recommendations and areas of focus are updated
- the industry purpose becomes more clearly defined, developed and meaningful
- shared goals and objectives are explored
- collaborative partnerships are established and enhanced

Thank you

We would like to thank the following for their contribution to the Summit discussions that have enabled this White Paper;

Maureen Andersen	VP, Arts & Entertainment **AudienceView**
Stuart Cain	Managing Director Commercial Marketing **National Exhibition Centre**
Alastair Creamer	Director **Creamer and Sundt**
William Differ	Operations Director **Delfont Mackintosh Theatres**
Helen Enright	CEO & Commercial Director **The Ambassador Theatre Group Limited**
Harvey Goldsmith	**Harvey Goldsmith Limited**
Tommy Higgins	Chairman **Accent Media**
Jena Hoffman	President **INTIX**
Gary Lustig	Chair of **INTIX**
Steve Machin	Managing Director **.Tickets**
Rachel Miller	Marketing Director **The Lowry**
Bryan Raven	Managing Director **White Light Ltd**
Karl Sydow	Producer
Karl Vosper	Managing Director **Toptix UK**

Get involved...

Please contact MCLTD;

If you wish to be part of ongoing Summit discussions planned for 2016+.

If you or a colleague are interested in hosting a Summit tailored to you or your teams specific business needs.

If you are interested in us presenting the findings as part of your conference, or industry event, as a keynote presentation, or a facilitated workshop.

If you wish to purchase additional copies of this publication, or make a bulk order to support training and industry events.

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This White Paper is the output of a unique Summit of industry leaders, subject matter experts and opinion formers.

Combining research, insights, experiences and ideas, it offers timely and relevant advice to those connected to the entertainment industry.

Its aim is to;

- **guide** leaders in prioritisation and decision making
- **engage** early ambassadors to commit to action
- **support** the wider industry in becoming better prepared for survival and success
- **embed** belief not simply in 'what is', but in 'what might be'
- **set the direction** for the future with clear recommendations and game-changing ideas