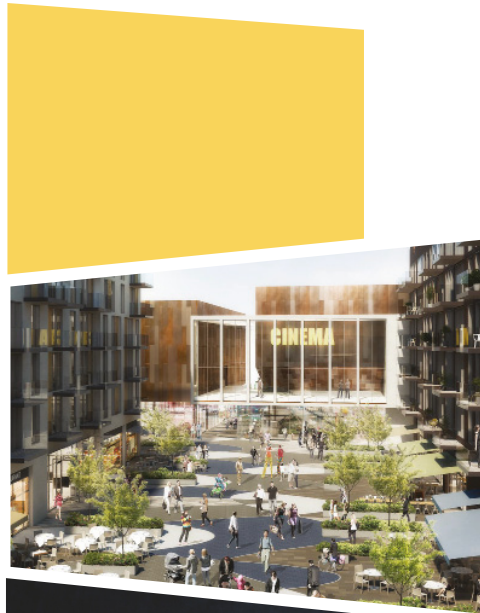


The Big Picture Conference 2019 Repurposing Retail Space for Leisure Use

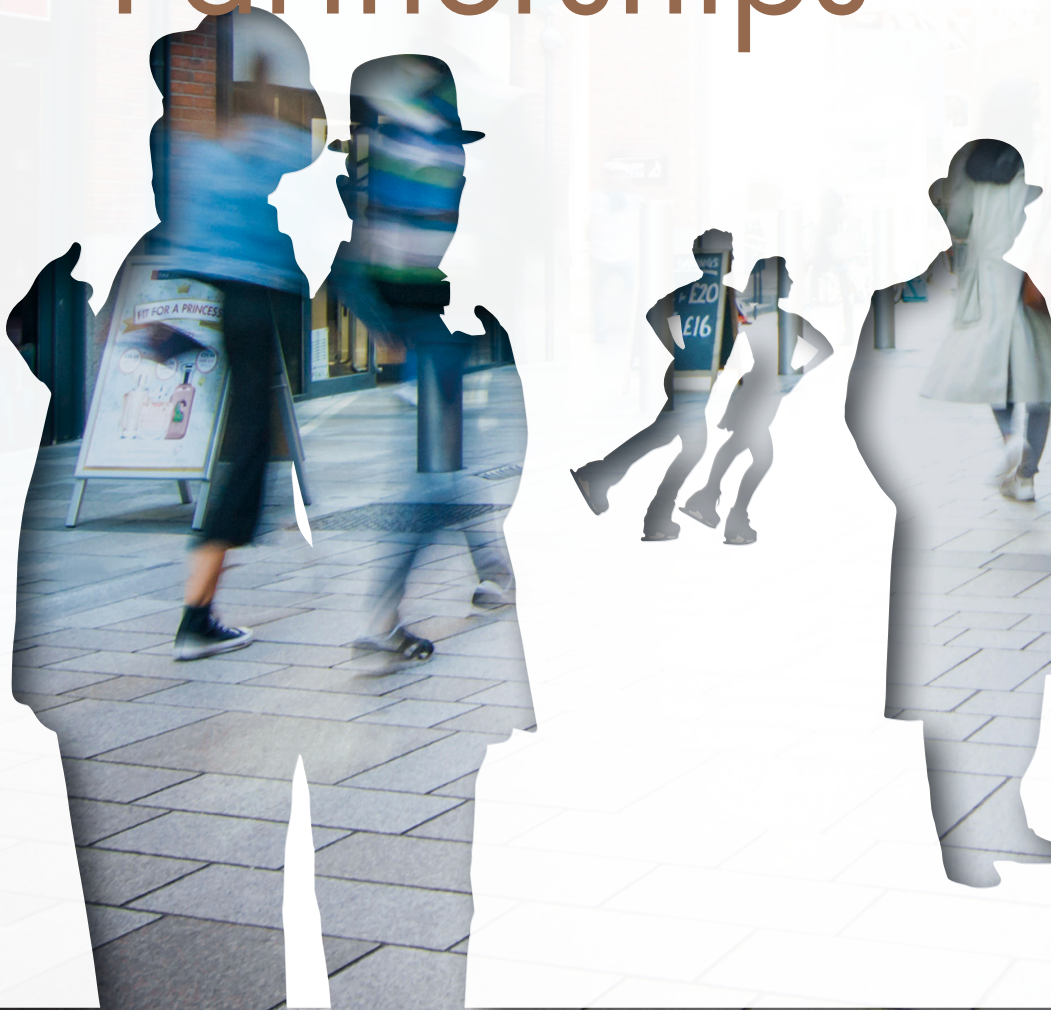
Tuesday 17th
September 2019



EVERYMAN

THE BIG PICTURE

Strategic Delivery Partnerships





There is an opportunity to re-invent our town centres that requires a new type of collaboration between public and private sectors.

Ellandi offers Local Authority partners a bespoke strategic delivery solution to:

- Navigate funding & delivery options together
- Achieve risk sharing / alignment
- Provide best in class partners for each phase
- Ensure long term commitment to delivery

We do this through:

 **Insight** - a fresh vision founded on proprietary data from our specialist Research & Analytics team, to establish the purpose and potential of a place.

 **Implementation** - practical commercial capabilities to acquire and deliver in the long term.



Success takes different shapes

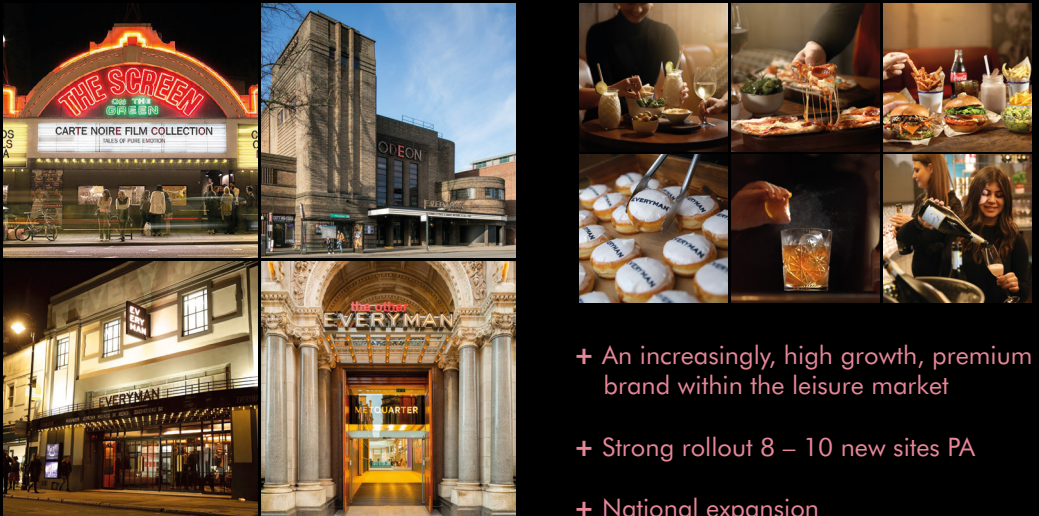
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Transforming cinema from heritage to market towns & metropolitan venues...



- + An increasingly, high growth, premium brand within the leisure market
- + Strong rollout 8 – 10 new sites PA
- + National expansion

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The Big Picture team - left to right: Mike Thomson (Partner), John Sullivan (Partner), Judith Querfurth (Partner), Kath Knight (Admin Assistant) and Rob Arthur (Partner).



Welcome from The Big Picture team

A warm welcome to everyone to this year's conference: Repurposing retail space for leisure use.

Britain's high streets continue to face a number of challenges. Much has been written about the continued decline, with many pointing the finger at the growth of online shopping. But is that the only issue? What other factors affect the high street? Why are some towns and cities thriving and others declining? What are the solutions? What is happening abroad?

With the loss of services and smaller retailers, Local Authorities and Property Developers need to repurpose their high streets, making twin visits desirable again, and developing a thriving day and night time economy for everyone.

Today's conference cannot answer all the questions, but with a range of expert speakers and panel, it aims to stir debate and thought whilst providing insights into solutions and successes. Cinema isn't the only answer, but it can act as a catalyst, attracting other leisure and food and beverage to towns and cities.

A word of thank you to our sponsors and speakers who have helped make this event possible.

Finally, if you are attending REVO Liverpool 2019, please come and meet us at stand 23.

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THE BIG PICTURE

Thank you!

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Conference & Exhibition
Liverpool 2019

Schedule

9.00am	Guest registration
From 9.30am	Sponsors showreel
10.00am	Delegates to Everyman - Screen 3
10.15am	Welcome & introduction Mike Thomson - Partner, The Big Picture
10.30 - 10.50am	The Big Picture View John Sullivan - Partner, The Big Picture
10.50 - 11.20am	Case Study - Local council presentation Naz Parkar - Director of Growth and Housing, Kirklees Council
11.20 - 11.50am	Morning Keynote Speaker Mark Robinson - Property Director and Co-Founder, Ellandi / President, Revo
11.50 - 12.30pm	Architectural approach to retail challenges in the 21st Century David Leonard, Director, Leonard Design Architects John Morgan, Director, Leonard Design Architects
12.30 - 1.45pm	Networking Lunch
1.45 - 2.15pm	The IHS Markit View David Hancock - Research Director, Film and Cinema, IHS Markit / President, EDCF
2.15 - 2.45pm	Assembly Underground - Leeds Nick Gregory - PopCity Richard Sweet - Space Revolution / PopCity
2.45 - 3.15pm	Afternoon Keynote Speaker: Driving a sense of occasion back onto the High Street Crispin Lilly - CEO, Everyman
3.15 - 3.55pm	Q & A Session Moderator: Mike Thomson - Partner, The Big Picture Crispin Lilly - CEO, Everyman Nisha Katona - Founder and CEO, Mowgli Street Foods Mark Robinson - Property Director and Co-Founder, Ellandi Stefanie Fischer - Consultant, Philip Meadowcroft Architects David Hancock - Research Director, Film and Cinema, IHS Markit / President, EDCF Paul Sargent - Chief Executive and Co Founder, Queensberry
3.55pm	Conference round up Mike Thomson - Partner, The Big Picture
4.00 - 5.00pm	Networking Drinks in the Everyman Bar

Speakers



Mike Thomson - Partner, The Big Picture

Introductions & Host of the Day | Q & A Session Moderator

Mike Thomson's background is both operational and commercial. His expertise is in developing commercial strategies for cinema and leisure owners, operators or developers. As a Director at Virgin, UGC Cinemas, and Cineworld Mike headed up the combined marketing, film programming and retail functions, developing fully integrated commercial strategies, including the development and launch of the 'Unlimited' card – the UK's first, and largest, cinema subscription scheme.

Mike recently created a new cinema concept and brand position for The Light Cinema's, the UK's fastest growing cinema chain, including its subscription card, Infinity. Prior to the cinema industry Mike held senior executive positions at BHS and Virgin Megastores. This background in retail and cinema uniquely positions Mike to help local authorities, developers, shopping centre managers and investors on delivering integrated entertainment offers within malls or town centres. Over the last 10 years Mike has gained extensive knowledge of International markets working across Europe, with particular focus on the emerging Eastern European market, The Nordics, Middle East and India.



Mark Robinson - Property Director and Co-Founder, Ellandi / President, Revo

Morning Keynote Speaker | Q & A Session Panel

Mark co-founded Ellandi over 10 years ago and during this time has delivered change to over 40 communities across the UK. As this year's president of Revo he has been very active in campaigning for business rates reform and promoting public/private partnerships.

Ellandi uses data driven insight, in tandem with a hugely experienced team, to implement Strategic Delivery Partnerships with partners as diverse as family offices, charities, global equity funds and local authorities. It has three cinemas in its portfolio and several deals progressing as it continues to shape Future Places throughout the UK.

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Speakers



John Sullivan – Co-Founder of The Big Picture and The Light Cinemas

The Big Picture View

Successfully consulted on and initiated cinema developments with town centres and shopping centre groups.

John entered the UK market in 1996 and steered Warner Village Cinemas (now VUE) through a 30 site development programme across England, Wales, Scotland and Ireland while also being responsible for Village Roadshow's development interest in CGV Cinemas South Korea (1998-2001).

CGV have emerged as one of the top five global cinema operators. John has been active in 30 International markets, developing or advising on cinema throughout Western and Eastern Europe and more recently the Middle East.

John through TLC has secured one of the hard fought for 5 exclusive Cinema licences for Saudi Arabia to form muvi Cinemas where the team from The Big Picture are currently engaged on a 20 site roll out over next two years predominantly in existing shopping centres.



Naz Parkar - Director of Growth and Housing, Kirklees Council

Case Study - Local council presentation

Naz has over 25 years' experience in the Housing and Regeneration sector. Having been Executive Director for the North East, Yorkshire and the Humber at the Homes & Communities Agency, the government's Land & Regeneration Agency, where he led on a number of Housing and Regeneration projects.

Naz joined Kirklees in February 2017 as Strategic Director Economy and Infrastructure. He is currently Service Director for Growth & Housing (2018).

Naz is the champion Director for the Council's inclusion and diversity strategy and plan.



Depot, Lewes



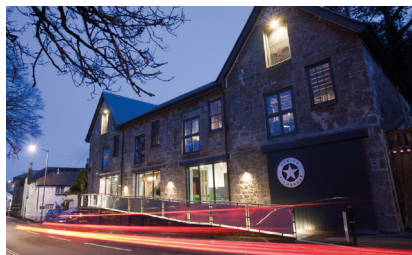
Campbeltown Picture House - Screen 1



Campbeltown Picture House - Screen 2



Broadway, Nottingham



Newlyn Filmhouse

Philip Meadowcroft Architects is an award - winning architecture and urban design practice with an established reputation for town centre regeneration and delivering excellent, well-crafted buildings across all sectors for public and private clients throughout the UK. These include masterplans, urban regeneration and town centre renewal strategies for the GLA and numerous Local Authorities. Phil Meadowcroft was an LDA Urban Design Advisor.

Stefanie Fischer is one of the leading cinema architects working within the independent cinema sector in the UK. She has provided services to Regional Film Theatres, commercial independent cinemas, community cinemas, Local Authorities, Developers, Cinema Business Consultants and to architectural practices.

Stefanie's reputation is based on her strong track record of delivering cinemas that are sustainable and which provide a welcoming and accessible leisure, cultural and social destination that contribute to town centre renewal and meet the expectations of a modern cinema going audience and operators. A key focus is attracting repeat visits across the age and socio-demographic range and on ease and economy of operation.

She is known for being able to optimise the cinema potential of existing buildings and has experience of both new build cinemas and refurbishments, including successful integration of cinemas within Listed Buildings.

While a Principal of, and Consultant to Burrell Foley Fischer LLP Architects, Stefanie worked on projects recognised as being at the forefront of a new breed of urban cinema, that make a positive contribution to placemaking, High Street and Town Centre regeneration. Completed projects include the multi award-winning Depot Lewes, Campbeltown Picture House, Broadway Nottingham, Scala Cinema and Arts Centre, Prestatyn, Norwich Cinema City and Newlyn Filmhouse.

Synopsis of Cinema Consultancy services:

- Pre-feasibility Studies, Site Options Appraisals and Feasibility Studies, working with Cinema Business Consultants including: CinemaNext Consulting; Independent Cinema Office (ICO) and Ron Inglis of Craigmount Consulting.
- Input on the suitability for cinema use as part of mixed use developments, acting for Developers or interested cinema operators.
- Cinema Consultancy services to architects.
- Cinema consultancy services to provide a high quality viewing experience in performing arts auditoria being equipped for cinema exhibition.
- Full architectural services from Feasibility Study Stage to the completion of cinema projects, including: the integration of the cinema technical fit-out, designed and specified by others, within the overall design.

Speakers



David Leonard BA(Hons) BArch(Hons) RIBA - Director, Leonard Design Architects

Architectural approach to retail challenges in the 21st Century

David is a Chartered Architect with 23 years of project experience in the design and delivery of some of the most significant mixed-use developments in countries around the globe. For seven years, he was the UK Head of Design at Westfield, the world's largest listed retail property group.

Before that, between 1987 and 2000, David was a director at Benoy Architects. He set up LDA in 2006, and is currently working on a wide range of development and asset management projects in the UK, Europe, the Middle East, India and Asia, in collaboration with other leading architects and specialist designers.

David's expertise encompasses a full range of skills from master planning and urban design through to the detailed design of retail, leisure, entertainment, office, hotel and residential projects, together with a detailed knowledge of public transport facilities and car parking. His particular specialism is all aspects of retail design ranging from retail planning and interior design to negotiations with tenants.



John Morgan, RIBA - Director, Leonard Design Architects

Architectural approach to retail challenges in 21st Century

As a Director at Leonard Design Architects, John is passionate about making a difference to the landscape and environment we inhabit every day.

Having spent 13 years at the world's largest shopping centre group, Westfield, John has an in-depth, diverse knowledge and extensive experience working on, leading and delivering some of the most prestigious retail regeneration projects in the UK and Europe over the past decade and beyond. LDA are working on some of the most exciting (and challenging!) projects currently taking place throughout not only the UK but worldwide.

John's experience, most notably in pre-development and planning, is integral to the undertaking of these projects which span from inception to completion.



Speakers



David Hancock - Research Director, Film and Cinema, IHS Markit / President, European Digital Cinema Forum

[The IHS Markit View | Q & A Session Panel](#)

David is a leading expert on the global film and cinema market, leading the IHS Markit Cinema team for nearly 23 years. He played a prominent role in the conversion of cinemas to digital projection and distribution technology over the past decade, both in his IHS Markit role and as Board Member and currently elected President of the European Digital Cinema Forum.

He has authored and developed many ground-breaking research reports in a wide range of areas: Digital Cinema, Event Cinema, Screen advertising, Global Market trends, Growth of Asian cinema, Cinema technology and the move to Premium Cinema amongst others.

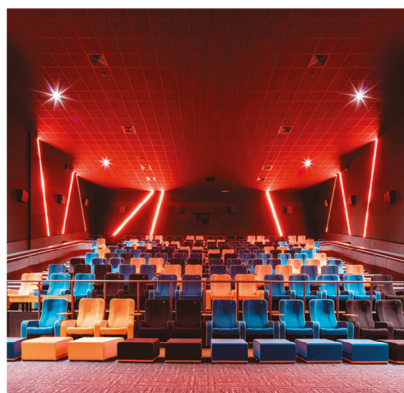


Paul Sargent - Chief Executive and Co Founder, Queensberry

[Q & A Session Panel](#)

Paul focuses on new business, corporate relations and funding at Queensberry. His career in property spans 3 decades across Continental Europe and the UK. His practical experience is second to none and includes involvement in over a dozen shopping centres in Iberia and 4 major regeneration projects in the UK. A dynamic individual with a holistic approach to development and investment, also champions the company's design led philosophy in everything it promotes.

Paul is responsible for accelerating and implementing Queensberry's diversification strategy. This involves building on existing experience in residential and commercial development to complement its established retail pedigree. Paul also leads on investment acquisitions on behalf of Queensberry retained clients. In an ever evolving market place, it is Paul's focus to assure Queensberry is at the cutting edge of occupier demand, design solutions and innovative funding structures.



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Speakers



Nick Gregory - PopCity

Assembly Underground - Leeds

PopCity is a start-up created by Nick Gregory and Richard Sweet (below), both from the south of England. They are two entrepreneurs professionally involved with the catering and street food industry, having watched the scene flourish for many years.

Nick is a commercial property entrepreneur with twenty years' experience mainly in the retail shopping centre development and asset management sector. Over the past 8 years, he has designed and developed ideas for large corporates including curating pop up schemes and street food concepts.



Richard Sweet - Space Revolution / PopCity

Assembly Underground - Leeds

Richard has run a variety of businesses covering a range of interests over the past 14 years from a London bar/restaurant and cafe, to operations converting shipping containers for independent street food operators in London and Teesside. With his experience and understanding of providing quality food and beverages, he co-created the start-up PopCity with Nick Gregory (above).



Crispin Lilly - CEO, Everyman

Driving a sense of occasion back onto the High Street | Q & A Session Panel

Crispin joined Everyman as CEO in December 2014. The business is AIM listed and growing fast. It now has 28 venues with another five opening this year and a further nine signed and due to open between 2020 and 2022.

The business operates smaller, intimate, high quality venues with a particular focus on hospitality, food and drink and a range of content from quality mainstream and independent films through to streaming of music, theatre and other live events. Starting in the industry with MGM Cinemas in 1992, Crispin worked for Virgin, UGC and Cineworld before arriving at Everyman. At Cineworld he was Commercial Director, looking after film and retail, whilst sitting on the management boards of Picturehouse Cinemas (after it's purchase by Cineworld in 2012) and DCM, the joint venture Screen Advertising company set up in 2008. Crispin is also a Trustee of MediCinema, a charity that builds and operates fully specified, adapted cinemas in the hearts of major hospitals to allow patients and their families to experience the power of cinema as an escape from their illnesses.

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Speakers



Stefanie Fischer MA DipArch (Cantab) RIBA FRSA - Consultant, Philip Meadowcroft Architects

Q & A Session Panel

Stefanie Fischer is one of the leading cinema architects working within the independent cinema sector in the UK. She has provided services to independent cinemas, community cinemas, Local Authorities, Developers, and Cinema Business Consultants.

While a Principal of and Consultant to Burrell Foley Fischer LLP, Stefanie Fischer worked on projects recognised at being at the forefront of a new breed of urban cinema, that make a positive contribution to place making and High Street and Town Centre regeneration. Completed projects include the multi award winning Depot Lewis, Campbeltown Picture House, Broadway Nottingham, Scala Cinema and Arts Centre, Prestatyn and Newlyn Filmhouse. She designed the first all digital cinema in the UK, Kino Hawkhurst. She currently provides Cinema Consultancy services through Philip Meadowcroft Architects.



Nisha Katona - Founder & CEO of Mowgli Street Foods

Q & A Session Panel

Nisha Katona was a child protection Barrister for 20 years and is the founder, CEO, executive and development chef of Mowgli Street Food restaurants. She taught Indian cooking for many years and started a YouTube tutorial channel. She opened the first Mowgli on Bold Street Liverpool in 2014 when she was still working full time as a Barrister. The popular restaurant expanded quickly to Manchester just a year later and there are now 8 Mowgli restaurants with a further 3 sites to open this year. Mowgli is about how Indians eat in their homes and on the street, parred back and unplugged. As well as mother to Mowgli, Nisha has two teenage girls and is also the author of 3 cookbooks: The Spice Tree, The Mowgli Cook Book and Pimp My Rice. She has also worked extensively with the BBC on several projects all championing the importance of simple home cooking.

Mowgli continues to pursue its dream to become a national voice for good, home style, fresh, clean Indian food.

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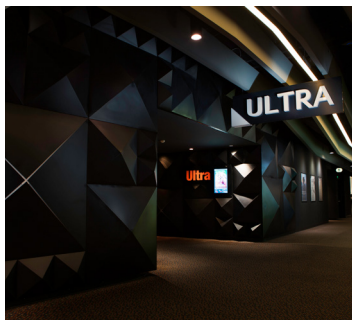


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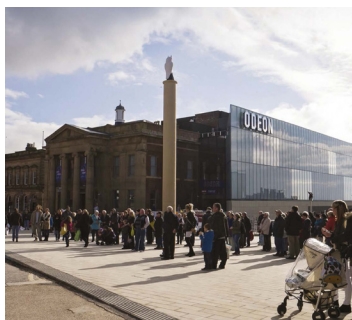
Case Studies

Working globally, thinking locally



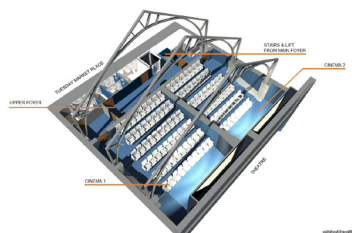
Grand, Baneasa Shopping City, Bucharest

This was a true end to end project with TBP advising from the initially concept, through development to successful operation. Having established the cinema as number one in the Balkans, TBP brokered the sale, some 8 years later for the owners, Baneasa Developments.



Oldham, Lancashire

TBP analysed the market and identified both a demand for cinema, and working with BDP architects, demonstrated the potential to redevelop the old town hall, an historic building, and one of the top ten listed buildings under threat of demolition. With a workable plan, the council went to the market, securing Odeon cinemas in an iconic redevelopment of the town hall.



Kings Lynn Corn Exchange, Norfolk

Already a highly successful venue, King's Lyn and West Norfolk council asked TBP to investigate the possibility to convert to multi-arts, adding cinema screens, using existing unused space. TBP's feasibility confirmed the potential and advised ion the size and type of auditorium. Work is expected to start in January 2020.

Case Studies

Working globally, thinking locally



muvi cinemas, KSA

TBP advised on all aspects from appraisal through design to commercial activity, creating KSA's first homegrown cinema brand (and winning an award for the brand too!). The first Mall opened in Jeddah in August 2019. And will soon expand to a 20+ strong circuit with TBP's support.



Finnkino, ITIS Mall Helsinki

TBP carried out a detailed feasibility study on the Helsinki market for Wereldhave, establishing the need for a destination cinema to enhance the mall. On November 30th 2018 the hugely successful cinema opened and quickly established its IMAX theatre as the best performing European IMAX.



Vue, Westfield London

TBP advised Westfield on the opportunity for cinema provision at its premier UK location. The result was the launch of the Vue cinema, which quickly established itself as the – UK's no 1 cinema. Not only that but TBP developed the strategy to make Westfield an alternative venue to Leicester Square, and hosts some of the UK's biggest film premieres.

THE BIG PICTURE

Strategic advisors

For us, there is no ‘one-size-fits-all’ approach; all markets and developments are different and we work with clients to get the best outcome. We are constantly collating new ideas to deliver global best practice for clients.

Market appraisal

Whether planning to build, improve or buy a cinema, we arm you with key information to make the right decision. We don't stop there, advising on associated leisure to help you create a destination for people to enjoy.

Design & layout

We will work with you to get the cinema your scheme and community needs. From initial schematics to build, we maximise the efficiency and revenue opportunities to “global best practise”.

Our services

It's not just about film.

Whatever your needs, The Big Picture has the experience to help you reach your aim.

We know the value of cinema – from market valuation to its positive role in placemaking and the regeneration of a town or city.

Operations

Today's customers are looking for memorable experiences. Because we also operate cinemas, we know what's needed to deliver that. We help select, train and develop customer facing teams for successful cinemas.

Commercial

How do you stand out in the market, serve your local community and compete with other leisure offers? We create clear commercial strategies, from brand positioning to promotional calendars to maximise your cinema.

THE BIG PICTURE



As expert partners and advisors, we help bring people and life to developments, towns and cities. We work throughout the UK and globally.



Need expert advice?
Please contact Mike Thomson:
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the-bigpicture.com