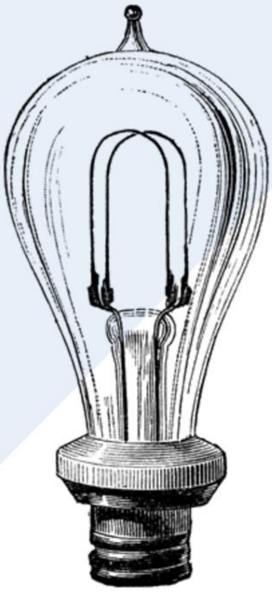

indigo

BRITISH FILM INSTITUTE

FILM HUB SOUTH-EAST

FILM AUDIENCE NETWORK EVALUATION

12 July 2023

Indigo Cultural Consulting Ltd

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EXECUTIVE SUMMARY

Contents

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Introduction

In early 2023, Film Hub South East (as run by the Independent Cinema Office), using National Lottery funding from the British Film Institute, commissioned Indigo-Ltd to conduct an evaluation of the BFI Film Audience Network (FAN) for the period January 2018-December 2022.

FAN was originally set up in 2012, under the BFI's *Film Forever* Strategy, using funds from the National Lottery to support a stronger and more connected approach to growing audiences for British and International film on the big screen by creating clusters of film exhibitors in regional/ national hubs across the UK.

Continued under the *BFI 2022* strategy framework, this second phase of FAN was intended to run from January 2018 to March 2022. However, due to the COVID-19 pandemic it was extended another year to March 2023.

This report covers the five calendar years from January 2018-December 2022. FAN and its associated activity continued for a further 3 months to March 2023 but due to the need to undertake an evaluation before this iteration of the FAN programme ended, admissions and other data generated during the final quarter were not included and have not been considered in our analysis.

FAN is a membership-based structure with over 1700 members, mainly made up of independent cinema exhibitors of various types and sizes, but including others such as screen archives, local authorities, libraries and other community-based organisations.

There are eight Film Hubs covering the UK, managed by Film Hub Lead Organisations (FHLOs):

1. London and outer Boroughs of Greater London
2. Midlands
3. North
4. N. Ireland
5. Scotland
6. South-East
7. South-West
8. Wales

Operating within the BFI's overarching strategic framework, the FHLOs have responsibility for decision-making functions within their Hubs, for the support and development of its membership and for the funding of audience-facing projects delivered by FAN members in their Hub region or nation.

Purpose of this evaluation

This evaluation assesses whether FAN has achieved its aims, both within the last 12 months but also over the full five-year period, and makes recommendations for the future of FAN in the context of the BFI's Screen Culture 2033 strategy. The FAN aims were:

- to **develop a larger, more diverse, confident and sustainable audience** for a wider range of independent British and international film - with a primary focus on the collective viewing experience
- to **create a stronger, more connected and confident sector** for the distribution and exhibition of independent British and international film.

The specific priorities for FAN were to:

- **increase access to a wide range of independent British and international film** for audiences, especially those outside central London.
- **increase engagement with BFI supported activities** across the UK and enhance the quality and cultural depth of audience experience.
- **increase access to the UK's screen heritage** especially via the BFI's National Film & TV Archive and those of the regions and nations.
- **enhance the quality and reach of audience facing activity**, **deepen knowledge** and **build capability** in its membership.

AND

- to do this with a particular **emphasis on increasing the diversity of audiences and boosting the number of 16–30-year-olds** engaging with FAN activity.

The '**Measures of Success**' for FAN were:

- A **more diverse audience** is engaging with FAN activity.
- There is a **growth in FAN audiences** along with **enhanced opportunities** for them to enjoy an in-depth cultural experience.
- There is an increase in FAN **audiences aged 16-30**
- FAN **members are more knowledgeable and effective in their work**, including in their ability to respond to BFI 2022 priorities.
- There is an **increase in audiences for screen heritage** material.

The evaluation also considers the implications for FAN under the new Screen Culture 2033 strategy.

Methodology

This evaluation took an **outcomes-based approach**: that is, it assessed data provided by BFI and gathered directly by the evaluators to evidence the extent to which FAN's desired outcomes were achieved. As we have conducted the evaluation, we have also noted where processes are hindering effective data capture for evaluation and made recommendations for improvements.

Each of FAN's five priorities had a set of 'indicators' attached to them, to measure the extent to which the outcomes had been achieved. We first attempted to **align these indicators** with FAN outcomes to evaluate whether the data collected was measuring outcomes that directly connect to the aims of the project. Although many of the indicators could be mapped directly to outcomes and were successfully captured in the data collection, we found a need to develop a tighter logic model to connect aims, indicators and data collection questions more directly in the future.

In this report, we analyse **overall project funding and numbers**, then examine **audience-facing projects** in depth, followed by **member support projects**. We assess the **impact of FAN** in terms of **economics** as well as the broader **themes** emerging from the evaluation, including looking ahead to the BFI's Screen Culture 2023 strategy and the role FAN could play in achieving these aims.

Quantitative data collection

Quantitative data was provided by the BFI, collected during the five years of FAN activity. Four data collection processes had been used:

- **Project Reporting Forms** were used to collect data from the FAN member project team on progress, challenges, and successes of the project they had been funded to deliver.
- **Audience surveys** were used to gather feedback from the public who attended FAN-funded projects.
- **Member surveys** were distributed to FAN members to gain insight into their experiences and perspectives.
- **Hub Reporting Forms** were used to collate information on all the above plus budgetary information to share with the BFI.

Qualitative data collection

In-depth interviews were carried out by the evaluators with all eight Hub managers and 23 FAN Members from across all regions and devolved nations.

Findings & conclusions

Overall outcomes

- The **FAN model and approach was viewed very positively** overall by Hubs and members. It was seen as a **unique model** of funding and support, and it provides an exemplary template for collaboration and localised provision. The combination of targeted funding – sometimes only small amounts – and collaborative, supportive working relationships created meaningful projects embedded in **communities** and **catalysed partnership working** to develop a more connected sector.

- Over **£8m grants** were distributed to **2,428 projects**, of which **1,514 were audience-facing** projects (those which directly targeted the public and recorded admissions, in person or online).

- The **gross value added** by FAN activity was estimated to be **at least £21.2m**. This was a conservative estimate due to a lack of adequate data around audience spend and additionality.

- Across all FAN projects, the median average **'cost per head'** (grant spent for each attendance) figure was **£5.19**. The typical range of 'cost per head' (CPH) within the FAN programme was between £2.83 – £11.03. This means that each physical attendee for a project that was supported by a FAN grant, cost between £2.83 and £11.03.

Audience outcomes

- FAN **exceeded its original 1.6m target admissions**, with **nearly 2.3m admissions**, of which

1.9m were physical and 0.3m live online. **Live online screenings**[1] were a new development as organisations responded to the enforced closures of the pandemic lockdown. Even with a pro rata adjustment of the original target to include the additional 2022/23 year (which would equate to a target of 2m admissions), FAN achieved the aim of developing a larger audience for independent film.

- Year-on-year physical admissions totals had been falling pre-Covid and were then hit by Covid-19 pandemic and lockdowns. **Whilst they have begun to recover, 2021/22[2] admissions remained at 63% of 2019/20 admissions**.
- **Other audience engagements** were recorded, but a lack of consistency of engagement type and reliability of data meant they were not included in this evaluation. However, they could provide potential for future outcomes frameworks and indicators it is likely they support FAN aims. These engagements were '**watch later' online** viewings and **'indirect' admissions** (which covered projects such as screenings in shopping centres where a proxy for audiences was taken from the overall daily footfall for the centre rather than numbers who watched or engaged).
- **Targets for audience development were exceeded for Under 30s and LGBTQIA+[3] audiences** but fell slightly short for both ethnically diverse[4] and disabled audiences. Where projects were specifically designed to develop an audience, overall these performed strongly, suggesting that focusing funding on projects designed to reach under-served audience segments is a successful approach.
    - Classification of projects was in some areas confused in terms of the connection to target audiences and priority audiences in the framework. An outcomes-based evaluation was therefore hampered for some target audiences due to inconsistencies in recording project focuses (for example, disabled audiences).
- Increasing access to Screen Heritage – a specific aim for FAN – was achieved on a smaller scale than other project strands, but **Screen Heritage projects were successful** in terms of median average admissions and played a **central role in placemaking** within communities. However, younger audiences – a key target for FAN – were under-represented in these projects.
- **Performance varied by region** due to geo-demographic differences, differences in exhibitor sector structure, challenges in local and regional infrastructure (e.g., transport) and differences in other funding sources. Targets were therefore sometimes too generalised and did not take account of specific intra-regional or intra-national differences.
- **Audience experience was overall very positive** (100% good or very good ratings on overall experience). Survey questions were not all directly related to the outcome framework.
    - Audience surveys collected adequate sample sizes but were reported to be

[1] 'Live online' is defined as viewers who 'logged on' to an online screening at a specific, scheduled time as distinct from those that 'watched later'.

[2] *2020/21 year aligned closely with the peak pandemic year and multiple lockdowns so 2021/22 represents the first full year of data post-pandemic. 2022/23 data cannot yet be compared as it only includes the first three quarters of the year.*

[3] BFI definition (August 2021): "The term LGBTQIA+ refers to people who identify as: Lesbian, Gay, Bisexual, Transgender, Intersex, Asexual, Queer, Questioning, Pansexual, Two-Spirit or Hijra. We also include gender non-conforming, gender neutral, gender queer and gender-fluid people within our terms."

[4] BFI definition (August 2021): "We use the terms Black, South Asian and South East and East Asian […] When there might be good reason to group experiences and communities together, we will use the term ethnically diverse as we feel it encompasses shared experiences without marginalisation."

increasingly challenging for members to implement; in some cases, sample sizes were too small to undertake reliable sub-group analysis.

- Several **key themes of success** emerged from the evaluation of member activity, which directly contribute to the BFI's overall aims: building communities, driving collaboration, developing EDI-led organisations, environmental sustainability and placemaking.

Member outcomes

- The FAN structure **delivered extremely well on its aims to create a more connected and confident sector**. As well as very high satisfaction ratings in the surveys, the benefits of the network in offering accessible support and advice was a strong emerging theme in interviews, and was seen as a **unique funding and support** structure.
- **740 member support projects** were run, achieving almost **10,000 individual contact points**[5] with industry professionals from member organisations through bursaries, conferences, training courses and other sector support activity. Recording of these numbers was, however, not consistent across Hubs, limiting comparative analysis.
- There were some **challenges with FAN funding structures**: single-year funding agreements; the lack of a clear pathway for organisations to transition to national centralised funding sources; and a one-size-fits-all approach which sometimes did not fit their specific work. *It is worth noting that some of these challenges have been addressed by changes to funding structures for the next period of FAN.*

Recommendations

- Continue to invest in the Film Audience Network, via the system of Film Hub Lead Organisations, to deliver local activity. The programme is effective and achieved most targets, in some cases exceeding them. FAN is a critical lever to deliver Screen Culture 2033, with high impact and value to the UK screen sector in delivering BFI aims.
- Exploit the experience and learnings from FAN activity (including around EDI and Sustainability) for the benefit of the wider UK screen sector, sharing and learning from best practice. FAN's UK-wide network and collaborative structure provides a proven model for developing localised provision based on identified needs, especially when looking forward through the lens of Screen Culture 2033.
- Continue the successful focus on young audiences, but develop more opportunities for young people to engage with screen heritage. This is under-developed for younger audiences yet has proven success in placemaking and community cohesion.
- Consider increasing investment in projects focusing on ethnically diverse and D/deaf and/or disabled audiences. These audiences did not reach target over the period (based on the median average), yet there are many examples of excellent outcomes across FAN member activity.
- Multi-year funding opportunities would benefit many member organisations to enable longer-term planning[6].

[5] This does not represent unique individuals as the same individual could have accessed multiple member support opportunities e.g., a bursary and a network meeting.
[6] Note that Hubs will be able to consider multi-year approaches to funding in the next iteration of FAN.

- There need to be clearer options for those organisations who have outgrown the limits of FAN funding (in terms of criteria and/or levels of funding required) but do not qualify for the Audience Fund due to not being fully national (eg multi-county organisations). This increased pressure on the FAN funding pot needs to be addressed to ensure that effective organisations do not fall into the gap between FAN and other BFI funding. Where member organisations are developing a national programme, Hubs have a role in signposting to national programmes of funding, mainly the Audience Project Fund. The new R&D strand of this fund should help provide an element of bridging for these organisations as they grow.
- Ensure FHLOs have a clear voice within the BFI to advocate for the reality of what is achievable in delivering audiences and activity on the ground, especially as the shadow of Covid-19 continues to present challenges to organisations in both surviving and in developing audiences.
- In evolving outcome frameworks, build in the more intangible or indirect benefits of FAN and FHLOs such as regional advocacy, partnership development and member organisation mentoring and support, ensuring they are adequately funded to deliver these additional benefits.
- When setting audience targets, try to do more to acknowledge the regional differences which impact audience attendance, whether due to different demographics or barriers to attendance (eg transport).

1 METHODOLOGY AND FRAMEWORK

1.1 Project Background

In BFI2022 (the BFI five-year strategy for the period 2017-2022) the BFI set out its commitment to giving everyone, everywhere in the UK the opportunity to enjoy and learn from the richest and most diverse range of great British and international filmmaking, past, present and future. The BFI Film Audience Network (FAN) was central to this commitment as well as being a manifestation of the BFI's ambitions to work in partnership across the UK.

Set up with National Lottery funding in 2012, FAN was designed to create clusters of film exhibitors in regional/ national hubs across the UK that could respond to local needs and contexts in order to deliver a diverse and inclusive cinema experience for local audiences. Led by film specialist organisations - Film Hub Lead Organisations (FHLOs) - these hubs are communities of interest that work alongside each other to develop screen culture, to increase sector capability and to serve audiences, regardless of location.

FAN is a membership-based structure with over 1700 members, mainly made up of independent cinema exhibitors of various types and sizes, but including others such as screen archives, local authorities, libraries and other community-based organisations[7].

The project under review here spans the period from January 2018 - December 2022.

There are eight Film Hubs covering the UK:

1. London and outer Boroughs of Greater London
2. Midlands
3. North
4. N. Ireland
5. Scotland
6. South-East
7. South-West
8. Wales

The FHLOs have responsibility for decision-making functions within their Hubs (operating within the wider BFI FAN strategic framework), for the support and development of its membership and for the funding of audience facing projects delivered by FAN members in their Hub region or nation[8].

1.2 Scope of Evaluation

This report represents the evaluation of FAN in 2022/23[9]. However, as it is the final year of FAN 2018-23[10] it will offer data and reflections on the entirety of the five-year programme, as well as considering the implications for FAN under the Screen Culture 2033 strategy[11].

[7] FAN is free to join for those engaged in relevant activity.
[8] *Under BFI2022, FAN in England was given responsibility for filmmaking talent development within their Hub regions as partners in BFI NETWORK. This work will not form part of this review. Similarly, each Hub was given responsibility for an area of 'Cross FAN' activity. Work varied significantly from one Cross FAN area to another and as such will not form part of this global evaluation.*
[9] *Only data for Q1-3 was available for 2022/23 at the time of evaluating.*
[10] *This Iteration of FAN was originally due to end in 2022 but due to Covid was extended for a further year to 2023.*
[11] *https://www.bfi.org.uk/news/screen-culture-2033*

It is important to note that FAN was originally conceived as a 4-year programme, from Jan 2018 - Dec 2022, but that the Covid interruption resulted in the BFI extending this, along with all of its national programmes, for a further year. Data was available for this evaluation up to 31 December 2022.

The evaluation was undertaken as an **'outcomes-based' evaluation**, which means we have used the data provided by the BFI, and the data gathered through online interviews, to evidence the extent to which FAN's desired outcomes were achieved. As we have conducted the evaluation, we have also noted where processes are hindering effective data capture for evaluation and made recommendations for improvements in Appendix 2.

1.3 Glossary of terms used in this report:

- FAN: the BFI Film Audience Network. This is the collective term for all eight Hubs and their members. It is the term used for the overarching strategic project.
- Hubs, or Film Hubs: the eight geographical entities that make up the BFI Film Audience Network.
- FHLOs: Film Hub Lead Organisations. The organisations / teams that lead each of the eight Hubs.
- Hub Managers: the members of FHLO staff that have been employed to work directly on the delivery of the FAN project.
- FHLO staff: general term for the individuals that are employed by the lead organisation to work on the FAN project plus any other staff that contribute on an occasional basis.
- Member/FAN Member: an organisation that has signed up to become a member of FAN, joining via their local Hub. The majority of these are involved in screening film to audiences but it also includes others such as Film Archives, Libraries, Local Authorities etc. In the outcomes framework, these are also referred to as 'Partners'.
- CPH: Cost per head; total funding provided to a project divided by the total number of audience admissions.

1.4 Framework Overview

Under the BFI2022 strategy, the aims of FAN were twofold:

- to **develop a larger, more diverse, confident and sustainable audience** for a wider range of independent British and international film - with a primary focus on the collective viewing experience
- to **create a stronger, more connected and confident sector** for the distribution and exhibition of independent British and international film.

The specific BFI2022 priorities for FAN were to:

- **increase access to a wide range of independent British and international film** for audiences, especially those outside central London.
- **increase engagement with BFI supported activities** across the UK and enhance the quality and cultural depth of audience experience.
- **increase access to the UK's screen heritage** especially via the BFI's National Film & TV Archive and those of the regions and nations.

- **enhance the quality and reach of audience facing activity**, **deepen knowledge** and **build capability** in its membership.

AND

- to do this with a particular **emphasis on increasing the diversity of audiences and boosting the number of 16-30 year olds** engaging with FAN activity.

The 'Measures of Success' Outcomes for FAN were:

1. A more **diverse audience** is engaging with FAN activity.
2. There is a **growth in FAN audiences** along with enhanced opportunities for them to enjoy an in-depth cultural experience.
3. There is an increase in FAN **audiences aged 16-30**
4. **FAN members are more knowledgeable** and effective in their work, including in their ability to respond to BFI 2022 priorities.
5. There is an increase in audiences for **screen heritage** material.

Each of these five outcomes had a set of 'indicators' attached to them, to measure the extent to which the outcomes had been achieved.

It is worth noting that the framework, its outcomes and associated indicators was intended to encompass both the work undertaken at Hub level (the focus of this evaluation) and also the work of Cross FAN which is outside the scope of this evaluation. In some cases, performance indicators would be expected to be met more strongly via Cross FAN activity.

Figure 1. BFI FAN Outcomes[12]

	FAN OUTCOMES	PERFORMANCE INDICATORS
OFFERING A RICH CULTURAL PROGRAMME	A more diverse audience is engaging with FAN activity (both in numerical terms and as a proportion of overall audiences). There is a growth in FAN audiences along with enhanced opportunities for them to enjoy an in-depth cultural experience - including gaining a deeper understanding of the art of film. There is an increase in FAN audiences aged 16-30 (both in numerical terms and as a proportion of overall audiences).	• Number and range of audiences • Number and range of titles where relevant • Number, type and geographic location of delivery partners • Number and type of opportunities to deepen engagement with film • Satisfaction ratings (audiences and partners) • Value for money
	FAN members are more knowledgeable and effective in their work, including in their ability to respond to BFI2022 priorities.	• Number and range of participants • Number, range and geographic location of activities • Satisfaction ratings (participants and partners) • Value for money • Leverage for BFI funding • Increase in capability
ENGAGING YOUNG AUDIENCES	There is an increase in the number of 16-19 year olds attending screenings/events jointly organised with Into Film.	• Number and range of audiences • Number and range of titles • Number, type and geographic location of delivery partners • Number and type of opportunities to deepen engagement with film • Satisfaction ratings (audiences and partners) • Value for money
ACCESS TO SCREEN HERITAGE	There is an increase in audiences for screen heritage material, especially films drawn from the BFI National Film & TV Archive and those of the regions and nations.	• Number and range of audiences • Number and range of titles • Number, type and geographic location of delivery partners • Number and type of opportunities to deepen engagement with film • Satisfaction ratings (audiences and partners) • Value for money

1.5 Indicator Alignment

[12] From *BFI Film Audience Network 2017-2022: An Overview*

Indicator alignment ensures that the data collected is measuring outcomes that directly connect to the aims of the project. In the case of the FAN evaluation, it was found that some of the indicators (see figure 2 below) were not strongly aligned with their associated outcome areas.

Figure 2. Indicator Alignment

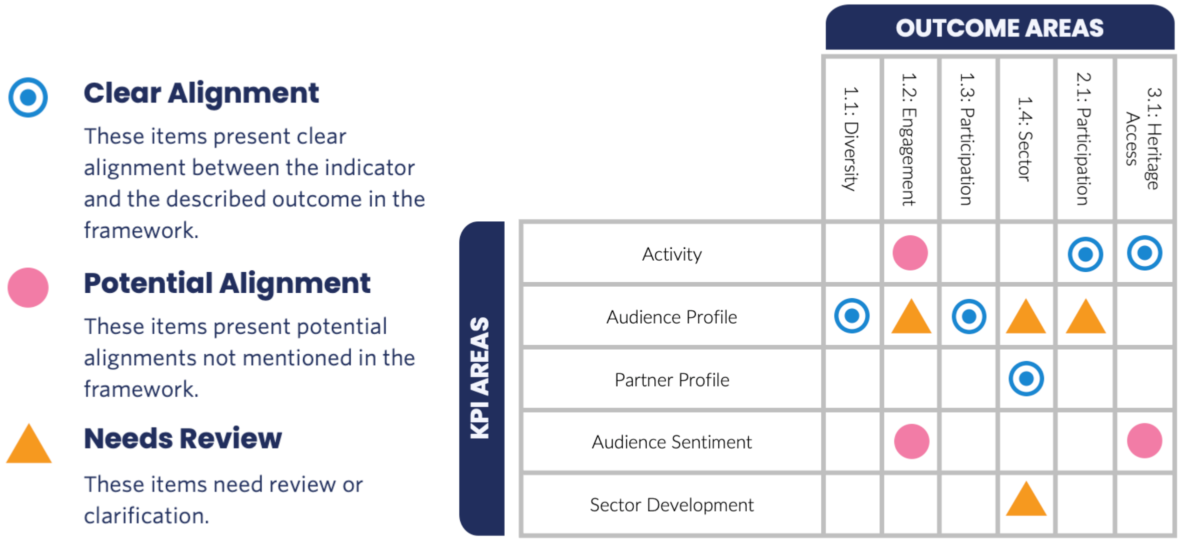


Figure 3. Monitoring & Evaluation Indicators

AREA	INDICATORS
Activity	• Number of titles • Number of screenings • Number of opportunities to engage[13] • Range of titles • Value for money
Audience Profile	• Number of audiences • 'Range' of audiences
Partner Profile	• Number of partners • Type of partners • Location of partners • Partner sentiment
Audience Sentiment	• Satisfaction rating(s)
Sector Development	• Increase in capability

[13] *'Opportunities to deepen engagement' means enhanced activity, recorded in 'enhanced' categorisation in dataset.*

Activity: Activity indicators could be directly aligned to Outcome 1.2. ‘Number of Titles’ cannot be reported as part of existing dataset and has been removed. ‘Range of titles’ was considered via using Project Strand as a proxy as no other data was recorded on range of titles.

Audience Sentiment: Satisfaction(s) rating has been split into two indicator types: Satisfaction & Experience. 'Deepen engagement' statements from Audience Sentiment surveys have changed Year on Year. *Inspired, Awareness, Deepened*, *Cultural & Appetite* were removed in Year 3 so are no longer relevant to analysis. New statements *Welcome*, *Opportunity*, *Think*, *Connected* were introduced in 2021/22 but do not have enough survey responses to support robust analysis.

Partner Profile: Partner Sentiment is based on qualitative interviews and some elements of partner survey data.

Partner Types: No categorization of Partner Types was made in the data set so this cannot be evaluated. We understand however that this piece of work has been undertaken separately and there is a separate membership database which records organisation type, location etc.

All outcomes mention ‘value for money’ in the framework, but this concept is not described in the outcome statements. BFI defines value for money as ‘cost per head' (CPH), based on project funding divided by audience admissions. Therefore CPH has only been calculated for audience-facing projects (see p52).

No economic or spending data was collected from audiences or members. Economic data is not a requirement of the Framework but is a requirement for undertaking broader economic impact analysis. CPH considers the grant amount but does not record the full cost of the activity.

Although many of the indicators could be mapped directly to outcomes and were successfully captured in the data collection, there is further scope for the development of a tighter logic model to connect aims, indicators and data collection questions more directly.

1.6 Data collection methodologies

Quantitative data collection

Four data collection processes were employed by the BFI to monitor and evaluate FAN. The **Project Reporting Form** was used to collect data from the FAN member project team on progress, challenges, and successes of the project for which they had received funding. **Audience surveys** were used to gather feedback from the public who attended FAN-funded projects. **Member surveys** were distributed to FAN members to gain insight into their experiences and perspectives. Finally**, Hub Reporting Forms** were used to collate information on all the above plus budgetary information in order to share with the BFI. Each of these methods provided valuable information that allowed the project team to monitor progress and evaluate the impact of the FAN project.

A mix of **quantitative** and **qualitative** data collection methods was created by the BFI and used by FHLOs and members to gather information on both the projects' outcomes and the experiences of those involved. The audience and member surveys provided quantitative data that could be analysed using statistical methods, while the Project Reporting Form and Hub Reporting Forms allowed for more qualitative data collection through open-ended questions and narrative responses. By reviewing the outputs from multiple collection methods, our evaluation team was able to triangulate the data, cross-checking the findings from different sources to gain a more comprehensive understanding of the FAN project's impact.

Qualitative Interviews

In-depth interviews were carried out with all eight Hub managers and 23 FAN Members from across all regions and devolved nations.

Interviews were conducted online and recorded/auto transcribed for reference. Using thematic analysis, common topics were identified. Verbatims and short descriptive case studies were checked with the interview respondents for factual accuracy. The interviews were semi-structured using a written discussion guide and consistency was maintained by using only three researchers across both the FAN Members and Hub Manager interviews[14].

Hub Managers were asked to describe the focus of their Hub's activity over the past year, give their opinions on how FAN has supported members and audiences, and to give any insights or reflections on the data relevant to their Hub.

FAN Members (listed in Figure 3 below) were asked to discuss their target audiences, and the extent to which they had been successful in attracting them; to highlight any specific projects with outcomes relevant to FAN's priorities; and how they engaged with and benefitted from FAN membership, including funding, professional development and training.

Figure 4. FAN Member Interview Respondents

REGION	MEMBER	REGION	MEMBER
N. Ireland	Belfast Film Festival	South-East	Creative Arts East
	Ormeau Community Cinema		Film Thurrock
	Ones to Watch@ Nerve Centre Derry		Fabrica
Wales	Magic Lantern, Tywyn	Scotland	Dundee Contemporary Arts
	Wicked Film Festival, Rhyl		Driftwood Cinema
			Take One Action Film Festival
London	Rio Cinema	South-West	Exeter Phoenix
	We Are Parable		Plymouth Arts Cinema
	Lexi Cinema		Afrika Eye Festival
North	Hyde Park Picture House	Midlands	Malvern Theatres
	Leigh Film Society/ Film Factory		Unseen Cinema Festival, Staffs
	ARC		Northampton Film Festival

1.7 Structure of this evaluation

In this report, we analyse overall project funding and numbers, then examine audience-facing projects in depth, followed by member support projects. We conclude with an assessment of the impact of FAN in terms of economic impact and broader themes emerging from the evaluation,

14 The discussion guide template is included as Appendix 2 including looking ahead to the BFI's Screen Culture 2023 strategy and the role FAN could play in achieving its aims.

2 FAN 2018 – 2022[15] IN NUMBERS

2,275,657
Total Admissions Reported

1,927,231 Physical Admissions Reported

348,426 Live Online Engagement Reported

1.6M
Initial BFI Target
(2018-2022)

+0.4M COVID Extension

2.0M
Adjusted BFI Target
(2018-2022)

2.3M
Achieved
2018-2022

2,428
Projects Delivered

1,514
Audience-Facing Projects Delivered

914
Member Support and Other Project Types

AUDIENCE SURVEY DEMOGRAPHICS

Under 30	21%	Target 19%
Ethnically Diverse	11%	Target 14%
D/deaf or Disabled	9%	Target 12%
LGBTQIA+	18%	Target 9%

FUNDING

£12.6M
Total Funding Provided by BFI for Programme

£21.2M
Estimated Total GVA Impact of Programme

£8.2M
Worth of Grants Distributed

£5.19
BFI Median Average Cost Per Admission

[15] *Period covered Is January 2018 - December 2022. FAN 2 started being funded in Jan 2018 as part of the transition period from FAN 1; the total funding figure includes this.*

2.1 Introduction

In this section, we have analysed project funding and the number of projects at an aggregate level by Hub. *As a reminder, this looks at Hub based activity only and does not include Cross FAN funding or activity. Separate evaluation reports exist for many of these areas and are held by the BFI.*

We have grouped projects funded by Film Hubs into three top-level categories:

Audience-facing projects

Just over half of FAN funding to FHLOs was spent on audience-facing activity. The FHLOs selected and managed project funding for members, who then spent this money to deliver audience-facing projects.

Audience-facing projects were designed to engage directly with the public and recorded admissions against them in the project logs. Audience-facing projects were designed to meet the first FAN core aim of 'developing a larger, more diverse, confident and sustainable audience for a wider range of independent British and international film, with a primary focus on the collective viewing experience'; they delivered *at least one* of the following FAN Measures of Success:

- A more diverse audience is engaging with FAN activity.
- There is a growth in FAN audiences along with enhanced opportunities for them to enjoy an in-depth cultural experience.
- There is an increase in FAN audiences aged 16-30
- There is an increase in audiences for screen heritage material.

Audience-facing projects were categorised by projects and Hubs to mirror these four outcomes: **Diversity & Inclusion**, **Engaging Audiences**, **Young Audiences** or **Screen Heritage**. We have called these four categorisations "Project Strands" in this report (see 2.3.5).

FHLOs made decisions on which initiatives (Funds) fitted into each of these strands. This top-level categorisation for BFI administration had some limitations for evaluation as it was always possible that a project could deliver on more than one of the FAN outcomes yet be classified in one "Project Strand" only. A secondary classification was introduced in the project logs to capture some of this, but this classification did not directly relate to the outcomes framework above, and included additional focus areas (e.g. low income) that were not stated in the framework; projects could also be classified under more than one secondary classification, making consistent analysis even more challenging. Therefore, these secondary classifications have not been included in the analysis. We recommend that future frameworks allow for primary and (if necessary) secondary classifications which both align more clearly with framework outcomes and are applied consistently.

Audience surveys also captured information on delivery of the framework in terms of both audience profile and audience experience.

Member support projects

These were projects designed to increase the capacity and capability of members rather than engaging directly with the public, for example the provision of training workshops, bursaries to attend courses/events and networking opportunities. Although attendances were usually recorded, these numbers were small due to the nature of the projects (e.g. training). These were projects designed to support the second core aim of FAN 'to create a stronger, more connected and confident sector' and to deliver the FAN Measure of Success:

- **FAN members are more knowledgeable** and effective in their work, including in their ability to respond to BFI 2022 priorities.

Any projects classified in the project strand of **Member Support** but having audience admissions recorded in the logs were reclassified to ensure inclusion in the appropriate analysis.

Other Projects

Other projects included wind-down costs and resilience funding awarded during Covid-19, as well as other initiatives indirectly delivering the FAN outcomes. These projects were excluded from our analysis as there were responsive the changing needs of the network or related to contingency planning rather than part of the original planned costs designed to meet the objectives of FAN.

Just over a third of FAN funding went into overheads, including staffing costs of each of the eight Film Hubs.

Figure 5. Illustration of Project Types categorised by Project Strands[16]

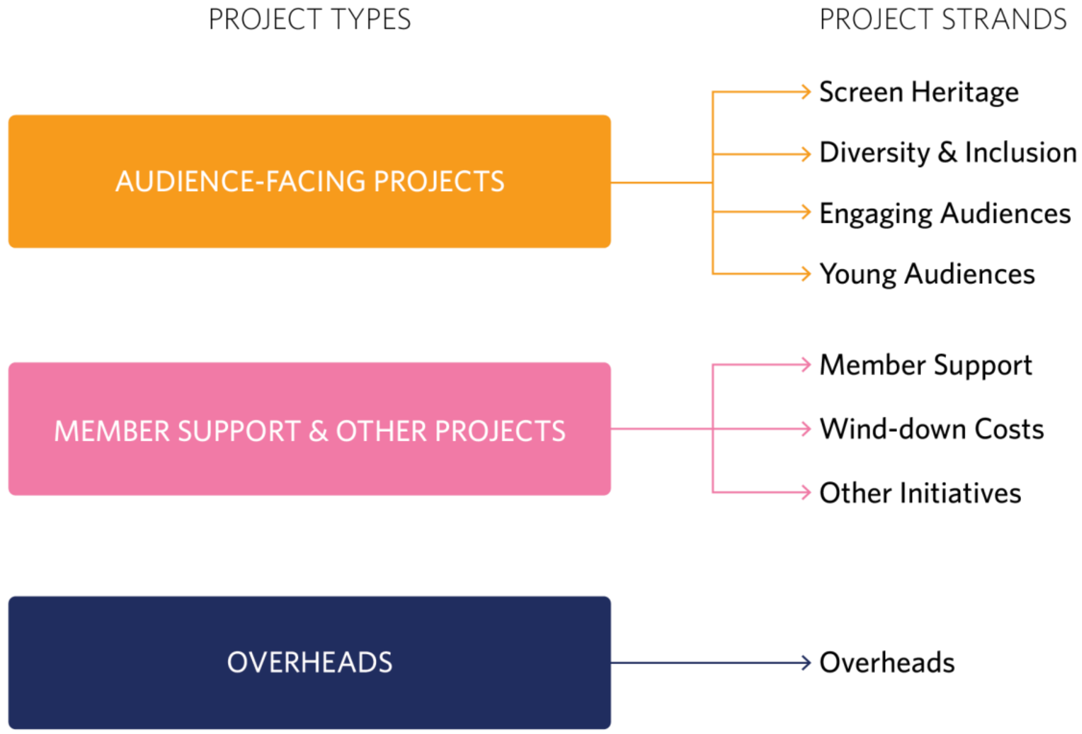


Figure 6. Aggregated Funding by Project Type

FUNDING AREA	FUNDING
Audience Facing Project Grants	£6,454,586
Member Support & Other Project Grants	£1,785,515
Overheads	£4,322,427

[16] Funding is categorised as 'audience facing' for the following budget strands; Diversity & inclusion, Engaging Audiences, Screen Heritage & Young Audiences. Funding is categorised as 'Member Support & Other' for the following budget strands; Member Support, Other Initiatives, Wind-Down Costs. Wind-Down Costs were budgeted in the event of needing to close down FAN at the end of Year 5 in case the programme was not continued; they represent only 1% of the total funding pool and were eventually used for a wide range of purposes by Hubs and/or Members. They have been included in "Other projects" but have very little impact on the overall evaluation.

Total	**£12,562,528**

Source: British Film Institute.

Figure 7. Funding Overview by Hub

HUB	AUDIENCE GRANTS	MEMBER & OTHER GRANTS	OVERHEADS	TOTAL
London	£657,736	£144,165	£365,202	£1,167,103
Midlands	£982,852	£265,967	£700,221	£1,949,040
N. Ireland	£564,217	£139,553	£409,480	£1,113,250
North	£1,286,801	£352,968	£857,573	£2,497,342
Scotland	£597,726	£210,135	£389,140	£1,197,001
South-East	£1,053,946	£199,240	£639,692	£1,892,878
South-West	£793,956	£259,063	£523,921	£1,576,940
Wales	£517,352	£214,424	£437,198	£1,168,974
TOTAL	**£6,454,586**	**£1,785,515**	**£4,322,427**	**£12,562,528**

2.2 Total Projects by Film Hub

Each Hub region or nation has its own distinct features with notable variations across the UK in terms of population and geographic size, scale and type of cinema exhibition infrastructure, and availability of other funding for exhibitors (this applies to the Nations[17]). Within each Hub there are also significant variations between urban, rural and coastal areas, population demographics and their locations and availability of public transport/quality of roads as well as varying degrees of 'sub regional' identity within a given Hub and different traditions of cultural engagement. These factors all influenced the nature and scale of activity across FAN and should be borne in mind when looking at variations of outcome across each of the eight Hubs.

The following table shows the number of project grants supported across the programme. Projects are categorised as either audience-facing or member support/other project types, and reported by hub. The accompanying graphic visualises this project split by hub.

Figure 8. Year on Year Project Summary

YEAR	2018/19	2019/20	2020/21	2021/22	2022/23 (Q1-3)
# of Projects	600	629	332	432	435
# of Audience-facing Projects	*371*	*356*	*234*	*270*	*283*

[17] *In the Nations, there is funding for cinema exhibition available from Film Cymru Wales, Screen Scotland and NI Screen. Whilst this is not distributed via FAN, it is a resource that is accessible to the FAN membership.*

# of Member Support & Other Projects	*229*	*273*	*98*	*162*	*152*

Source: British Film Institute. Projects categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis.

Figure 9. Percentage of Projects by Hub and by Type within Hubs

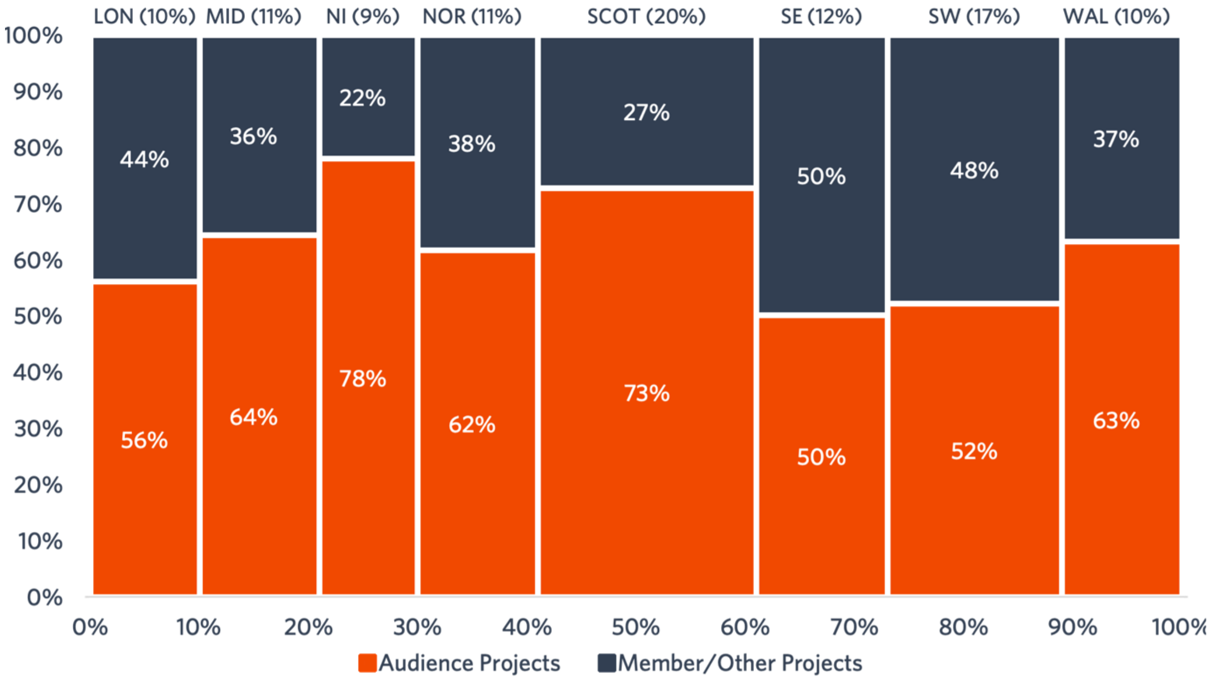


Figure 10. Project Summary – By Hub

HUB	# OF PROJECTS	# OF AUDIENCE-FACING PROJECTS	# OF MEMBER SUPPORT & OTHER PROJECTS
London	251	141	110
Midlands	267	172	95
N. Ireland	214	167	47
North	264	163	101
Scotland	493	359	134
South-East	289	145	144
South-West	402	210	192
Wales	248	157	91
TOTAL	**2,428**	**1,514**	**914**

Source: British Film Institute. Projects categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis.

In total, the Film Hubs reported supporting 2,428 projects: 1,514 of them audience-facing projects (62%). Within this, 18% of the members who received funding were being funded for the first time by their Film Hub. The funding of members for the first time is one way in which FHLOs try to broaden the diversity of audiences. In interviews, however, Film Hubs and members acknowledged there were challenges of meeting the increasing funding demands created by new members joining and longer-standing members needing continued funding. There is no target set for new members receiving funding and it is at the discretion of each individual FHLO.

The Scotland Hub recorded the highest number of projects (493) and audience-facing projects (359); this represents 20% of the total number of projects (24% of audience-facing projects) despite only receiving 10% of the funding. This is due to Film Hub Scotland having had access to other National Lottery funding through Creative Scotland, which was not available to any other Hub.

The relatively small proportion of funding into London (9%) demonstrated a conscious attempt to increase access for audiences beyond central London, in line with FAN's UK wide priorities. The levels of funding to the Nations is also relatively smaller and reflects the availability of other funding available to the sector which is not present in the English regions. Funding available for member projects were therefore influenced by a range of factors including population size, availability of other funds and the exhibition infrastructure itself.

Other Hubs may have had access to local or regional public funding and this difference in match funding availability greatly influenced the amount of work a Hub was able to deliver.

The overall number of projects must be looked at in tandem with the number of admissions (analysed later in this report) as the size and scope varied considerably.

2.3 Audience-Facing Projects

Headlines

- Physical audience admissions exceeded the FAN target despite the disruption of Covid-19 (and even without the extension of the four-year project into a fifth year to compensate).
- 79% of admissions were outside London and 42% were new audiences, demonstrating effective achievement against the FAN aims of developing a larger audience for independent film, especially outside London.
- Live online admissions provided unplanned additional audience engagement, but evaluation of this activity was limited by a lack of inclusion in the evaluation framework and a corollary lack of appropriately tailored data collection mechanisms.
- Year-on-year physical admissions totals had been falling pre-Covid and were then hit by Covid-19 pandemic and lockdowns. Whilst they have begun to recover, 2021/22[18] figures remained at 63% of 2019/20[19] admissions.
- Targets for audience development were exceeded for Under 30s and LGBTQIA+ audiences but fell slightly short for both ethnically diverse and disabled audiences. Where projects were specifically designed to develop an audience, overall these did perform strongly, suggesting that focusing funding on projects designed to reach under-served audience segments should improve success.
- Classification of projects was confused in terms of the connection to target audiences and priority audiences in the framework. An outcomes-based evaluation was therefore limited for some target audiences due to inconsistencies in recording project focuses (for example, disabled audiences).

Recommendations

- Develop ways to measure Live Online Admissions, 'indirect' activity and 'watch later' engagements within the future FAN evaluation framework, especially given the possibilities they may provide for audience development.
- Consider how decisions are made around categorisation in order to better understand their intended audiences versus FAN target audience, which in turn would help to better understand the effectiveness of projects aimed at these different audiences.
- Keep sharing and learning from best practice (e.g. in the BFI FAN Guide to Working with Young Audiences) in creating opportunities for young audiences to engage with a range of screenings, including heritage, where they are under-represented compared to other project strands.
- Ensure that the outcomes expected in the FAN programme are clearly articulated for members, predominantly to differentiate them from other BFI programmes.
- Focus audience data collection on outcomes directly related to the success indicators in the framework to reduce the length of survey and increase response rates, as well as clarifying reporting. A more connected logic model, as mentioned before, would enable this focus.

[18] 2020/21 year aligned closely with the peak pandemic year and multiple lockdowns so 2021/22 represents the first full year of data post-pandemic. 2022/23 data cannot yet be compared as it only includes the first three quarters of the year.
[19] Last full pre-pandemic year of data.

Projects and Admissions by Year

Comparing admissions: an explanation of median average

When we have compared audience admissions by Hub within this section, we have chosen to use the **median average**. The median average could be described as the **typical number of physical admissions per project**. Using the median average helps to minimise the impact of outliers in the data (e.g. festivals achieving huge admissions or very targeted projects achieving very small numbers). It therefore provides a useful benchmark against which to compare both individual projects and Hub performance. When combined with the total physical admissions figure, this has given a more rounded picture of what Hubs achieved.

Two forms of activity were considered in the analysis of the aggregate FAN data provided by BFI: **Physical Admissions** and **Live Online Engagements**. Physical admissions were the direct, intentional, on-site visits as part of the project while Live Online Engagements were direct digital engagements at a specific time. Both these numbers represent unique engagements rather than unique individuals, so may include audience members attending multiple times. For Live Online, it is possible that multiple individuals may have participated in one unique engagement (i.e. a group was watching together at home), so audience numbers may be under-stated.

Live Online was almost entirely a direct response to the forced closure of cinemas due to the Covid-19 pandemic which began in March 2020. While engagements in online screenings were captured and reported on, online work was not originally conceived as an output of the project, and therefore the evaluation framework did not include indicators relevant to the particular characteristics of this strand of activity. Live Online engagements are reported below at a top level.

As venues reopened (some in late 2020, others in 2021), Live Online decreased rapidly. However, if future strategy includes any element of Live Online, data collection should be designed with this in mind, for example including questions on the number of people watching.

In addition to Physical Admissions and Live Online, there were other audience 'engagements' with FAN Member activities that projects and Hubs reported. These comprised:

- 599,228 'indirect' physical engagements
- 182,087 'watch later' online engagements

Indirect physical engagement includes figures such as estimated footfall in the vicinity of screenings in public spaces; see below for an example of indirect activity. These indirect engagements were difficult to evaluate against the current framework.

'Watch later' online screenings represented an opportunity to watch after the initial live online event. They were available for varying time periods, sometimes with no fixed end date, and numbers of engagements were usually estimated and were inconsistent.

The evaluation framework did not include gathering or evaluating these audience engagement numbers and there was therefore no robust or uniform approach to the data collection or verification; given this variability and unreliability, we have excluded these engagement figures from this evaluation.

For the future, we would recommend developing a framework to capture and evaluate these indirect engagements as it is possible that they contribute to the overall FAN and BFI aims by exposing more - and potentially new - audiences to screened content.

Illustrative example of 'indirect' engagement activity: pop-up screening

As part of the *New Towns, Our Town* project, Film Hub South-East organised pop-up screenings of an archive package (designed specifically for Harlow) in a disused shop at the Harvey Shopping Centre in Harlow from 4 to 18 December 2018. They placed a projector in the empty shop unit and applied a transparent film to the window which looped the archive footage and projected it continuously. The effect was that the empty shop window itself became a makeshift cinema screen, bringing the heritage directly into the town centre during one of the busiest points of the year for maximum impact. A report from The Harvey Centre for this period showed that the centre entrance located nearest this installation had a footfall of 28,319. The average shopping number of weekly visitors to the Harvey Centre for this period was 211,438. This footfall was reported as an indirect engagement; as above, evaluation of this is excluded from this report but represents an opportunity for future evaluations.

Figure 11. Overall Cumulative Admissions

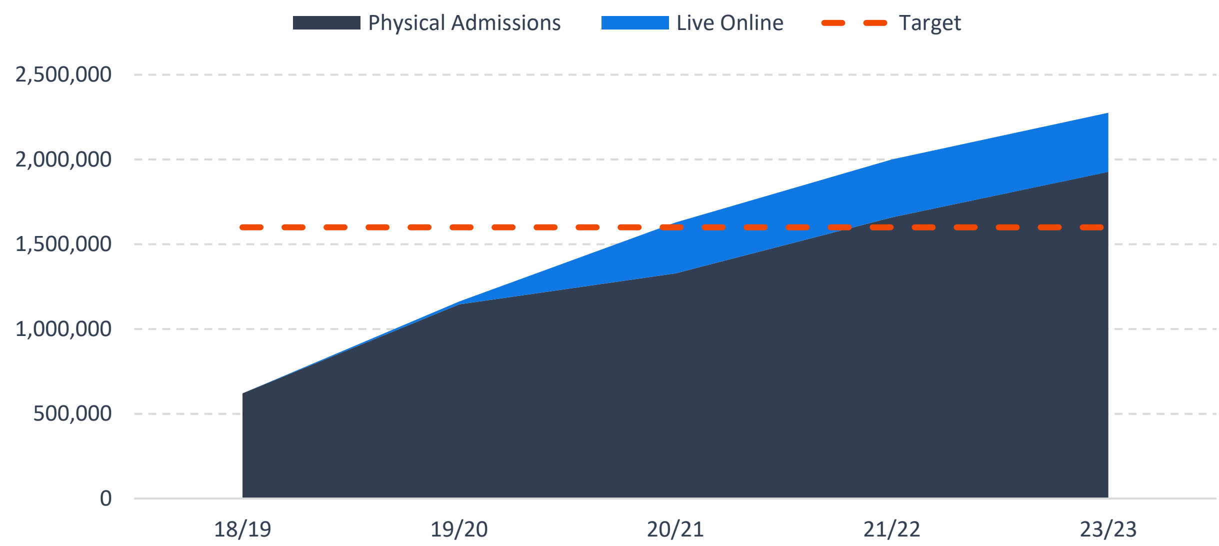


Figure 12. Year-on-Year Admissions

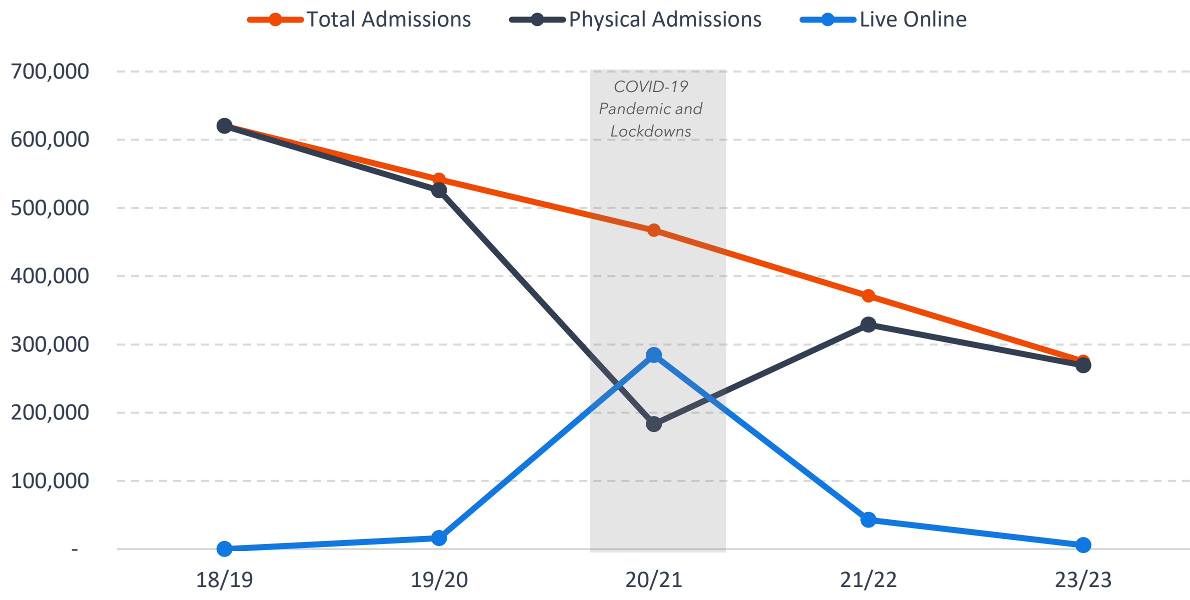


Figure 13. Year-on-Year Activity Results

YEAR	2018/19	2019/20	2020/21[20]	2021/22	2022/23 (Q1-3)	TOTAL
# of Audience-facing Projects	371	356	234	270	283	1,514
Total Admissions	620,180	541,754	467,326	371,228	275,169	2,275,657
Physical Admissions	620,180	525,800	183,131	328,680	269,440	1,927,231
Live Online Admissions	0	15,954	284,195	42,548	5,729	348,426
# of Screenings	17,561	12,182	9,574	15,183	11,728	66,228
Median Average Admissions	362	262	372	501	402	377

Source: British Film Institute. Analysis by Culture Counts. Median admissions represent physical admissions per project, excluding projects with no physical admissions reported. Projects categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis.

The total physical admissions target for FAN was 1.6m over an initial period of four years. When this was extended by an additional year due to Covid-19, the target was not formally increased as the extension was due to the restrictions on physical admissions during the pandemic. By end December 2022, the original target had been exceeded by c.700,000 admissions in total, including c.350,000 Live Online engagements due to member activity pivoting online.

[20] *Note that 2020/21 figures throughout are Impacted by the Covid-19 pandemic and lockdowns.*

However, both total and physical-only admissions declined year-on-year since the first year of FAN in 2018/19, and were doing so even before the pandemic: 2018/19 saw both the highest number of audience-facing projects and the highest admissions.

Despite the overall audience decline, the median average audience per project increased steadily, peaking when cinemas first reopened after the pandemic. It fell slightly in 2022/23 but is still higher than any pre-pandemic year. This could suggest that individual projects were becoming more successful at engaging audiences, or a focus by Hubs on projects which were going to deliver the biggest admissions numbers. The decline, therefore, was driven more by a reducing *number* of projects that were funded than by the *success* of individual projects.

Live Online admissions correlated directly to the Covid-19 pandemic. The high levels of audiences for these activities (284k in 2020/21) supports the FAN aim of developing a larger audience. However, this activity appears to have been unsustainable based on the return to almost exclusively Physical admissions by 2022/23 (less than 6k Live Online admissions in 2022/23 vs 269k Physical admissions). It is possible that this audience may have met the audience development aims of FAN (younger, more diverse), but surveys were extremely limited (see 2.4) and the small amount of data we do have shows poor numbers for Young Audiences that year (see 2.3.7).,it is important to understand the potential role online screenings could play in the future FAN strategy, experiencing developing ways that it can also meet the aim to deepen the audience experience.

Despite the increases in 2021/22 and 2022 physical admissions, these figures are significantly lower than those prior to Covid-19 as exhibitors slowly recovered. In interviews, both Hubs and members reported a slow recovery with audiences still not back to pre-Covid level and a sense of still trying to "survive rather than thrive".

Projects and Admissions by Hub

Figure 14. Year-on-Year Total Admissions by Hub

HUB	2018/19	2019/20	2020/21[21]	2021/22	2022/23 (Q1-3)	2018/19 VS. 2021/22
London	118,221	88,002	175,585	76,906	99,693	-35%
Midlands	98,217	55,405	47,875	40,393	23,703	-59%
N. Ireland	30,899	34,617	41,881	39,103	24,544	+27%
North	110,806	86,184	34,416	53,850	51,423	-51%
Scotland	62,732	60,492	99,200	27,984	8,453	-55%
South-East	68,850	66,225	25,144	30,198	39,567	-56%
South-West	71,459	85,049	15,641	50,645	23,924	-29%
Wales	58,996	65,780	27,584	52,149	3,862	-12%
TOTAL	**620,180**	**541,754**	**467,326**	**371,228**	**275,169**	**-40%**

21 Note that 2020/21 figures throughout are Impacted by the Covid-19 pandemic and lockdowns.

Source: British Film Institute. Analysis by Culture Counts. Median project admissions exclude projects with no physical admissions. Projects categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis.

Recovery to pre-pandemic levels has varied by region due to differences in exhibitor infrastructure and the levels of regional and local response to the pandemic challenges.

The Midlands has seen the slowest recovery, in part due to a reduction in exhibitors: the Midlands did not have the same number of independent cinemas as other regions pre-pandemic and venue shutdowns appear to have had a greater impact. The South-East and Scotland also appear to have been slower to recover audience numbers immediately post-pandemic. In the South-East, this is partly due to a lack of independent cultural venues (although there are a large number of commercial venues) and being more reliant on film festivals to deliver independent film content. In Scotland, funds reportedly went into more community cinema, which does not, as a rule, generate the same level of audience numbers. As a compounding factor, during the pandemic, cinemas reported often stopping the publication of printed programmes; research undertaken by Film Hub Scotland found that audiences did not know what films were on and this lack of knowledge likely suppressed admissions. In response, Film Hub Scotland produced a publication at the end of March 23 to highlight films and promote a return to cinemas[22].

In N Ireland, quicker recovery was in part attributed to the large number of community groups who responded quickly during Covid-19. Film Hub NI initiated several online meetings and online training to keep the network active. Film Hub NI reported applying for support, for example around website development, and focused on ensuring they could reconnect with audiences post-pandemic beyond their core base. N. Ireland is a much smaller independent sector than the other Hubs which had allowed Film Hub NI to spend a significant amount of time over the last nine years developing community connections; they then felt very well-networked to respond during Covid-19.

In Wales, the Welsh Government opened access to cultural venues earlier than in England and this was considered to have supported a stronger initial recovery.

The graph below visualises the proportion of physical admissions by Hub, alongside their project median average result. Note that as we are using median average, this does not directly correlate with the total admissions; it should rather be viewed in relative terms against other Hubs.[23]

[22] *https://issuu.com/theskinny/docs/1-32_indie_cinema_guide_ss23_issuu*

[23] *Comparison of the median and mean averages can show where Hub project size is skewed to smaller projects (eg South East) or larger projects (only London and N.Ireland have means greater than their medians).*

Figure 15. Aggregate Physical Admissions – By Hub

Figure 16. Aggregate Physical Admissions – By Hub

HUB	PHYSICAL ADMISSIONS	MEDIAN AVERAGE ADMISSIONS	MAX PROJECT ADMISSIONS	# OF PROJECTS
London	396,557	581	75,352	120
Midlands	227,637	496	21,947	145
N. Ireland	128,792	170	23,175	135
North	334,495	500	41,684	144
Scotland	213,030	249	10,424	247
South-East	213,271	528	17,522	124
South-West	232,415	326	20,061	162
Wales	181,034	341	34,454	119
TOTAL	**1,927,231**	**377**		**1,196**

Source: British Film Institute. Analysis by Culture Counts. Median project admissions exclude projects with no physical admissions. Projects categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis.

London remained the largest Hub for cinema admissions, with a total of 396,557 admissions. This was followed by the North Hub (334,495). Given the high population density in England's capital city, it is perhaps not surprising to see strong total admissions, but the median average suggests that typical projects were on a par with projects in the North, Midlands and South-East.

London delivered only 9% of audience-facing projects overall and the North 11%, so the high numbers of admissions for London and North are driven by a few outlier projects with very high admissions. For example, the highest admissions for London were recorded for the Cinema

Incentive Scheme, a points-based scheme that rewards exhibitors for screening more British, independent and specialised films. In London, the 75,352 admissions recorded against one single Cinema Incentive Scheme project represented 9 months of activity (April-December 2022), with over 4000 screenings of 220 films at 10 different locations.

The calculated median average admissions from a total of 1,196 projects was 377. There were regional disparities in cinema admissions and median averages which bear some correlation with population density and other external factors. For example, transport (including the cost of transport) may have influenced the total reach of projects in more rural areas.

> *There are so many things around trying to get people in a rural community to come out and see screenings and transport is one of them."*
>
> Driftwood Cinema, Wigtown, Scotland

There may also have been deliberate choices to fund projects that focused on a smaller target population.

> *People said to us, why are you doing this? Are there a lot of deaf people in town? And we have to say no, there's not a lot of anybody in town! But there are a few."*
>
> Magic Lantern, Tywyn, Wales discussing a project targeting D/deaf audiences.

In addition, the cost of living crisis hitting in 2022/23 was likely to have impacted regions differently:

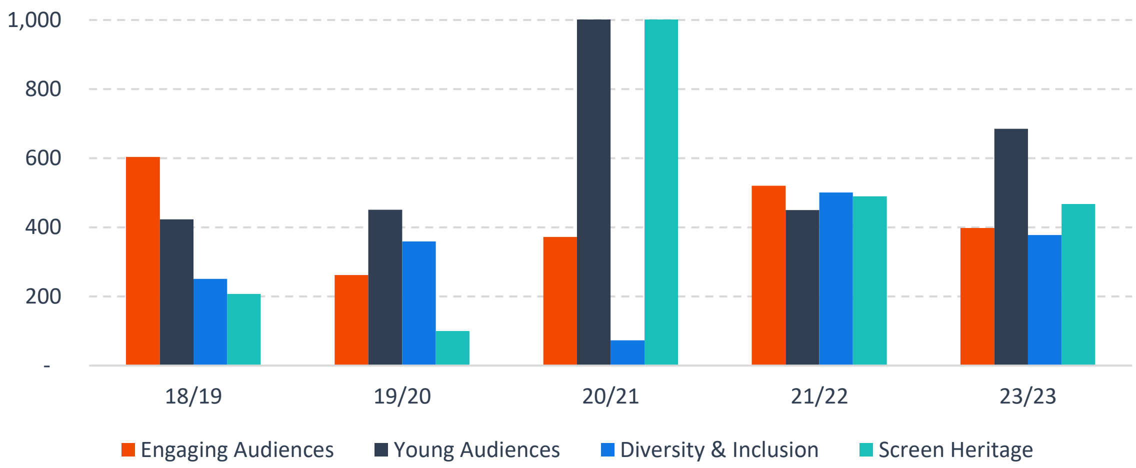
> *When you come to the cinema, you've got the transport and the fuel and then the cinema costs…"*
>
> Magic Lantern, Tywyn, Wales

The combination of these statistics as well as member commentary demonstrated a successful balance overall between the FAN aims of developing a larger audience through increasing reach, and increasing access or diversity through targeted engagement (see findings later in this report for more detail on performance by project strand and audience type).

Projects and Admissions by Project Strand

As outlined in 2.1 above, there were four audience-facing funding classifications within the dataset, relating directly to FAN priorities and measures of success (see 1.4 above). Three of these 'project strands' represented 95% of total physical admissions: Diversity & Inclusion, Engaging Audiences and Young Audiences, with Screen Heritage representing just 4% of admissions and 7% of the projects. Many projects (and admissions) were classified to "Engaging Audiences" which gave limited insight into the objectives of the project. For future classification, it is worth considering whether there could be more distinct categories to help to differentiate.

Figure 17. Year-on-Year Median Average Physical Admissions – By Project Strand



Note: Median admissions for Young Audiences and Screen Heritage in 2021 is 3,236 and 2,077 respectively. Y-axis limited to 1,000 to improve visibility.

Figure 18. Year-on-Year Key Project Strand Results – By Project Strand

PROJECT STRAND	YEAR	2018/19	2019/20	2020/21	2021/22	2022/23 (Q1-3)
Engaging Audiences	# of Projects	148	177	143	155	103
	Admissions	447,293	381,839	172,294	272,868	191,759
	Median Average	605	262	372	520	398
Young Audiences	# of Projects	65	45	1 *	19	23
	Admissions	101,557	79,239	3,236	17,204	37,638
	Median Average	423	451	3,236	450	685
Diversity & Inclusion	# of Projects	92	56	6	28	34
	Admissions	43,616	43,198	1,869	27,507	34,938
	Median Average	251	360	73	501	378
Screen Heritage	# of Projects	38	35	3 *	14	11
	Admissions	27,714	21,524	5,732	11,101	5,105
	Median Average	207	100	2,077	490	468

Source: British Film Institute. Analysis by Culture Counts. Admissions only represents physical admissions. Median admissions represent the median number of physical admissions reported per project and excludes projects with no reported physical admissions. Only one project reported physical admissions for 2020/21 Young Audiences and three for 2020/21 Screen Heritage.

Figure 19. Aggregate Physical Admissions – By Project Strand

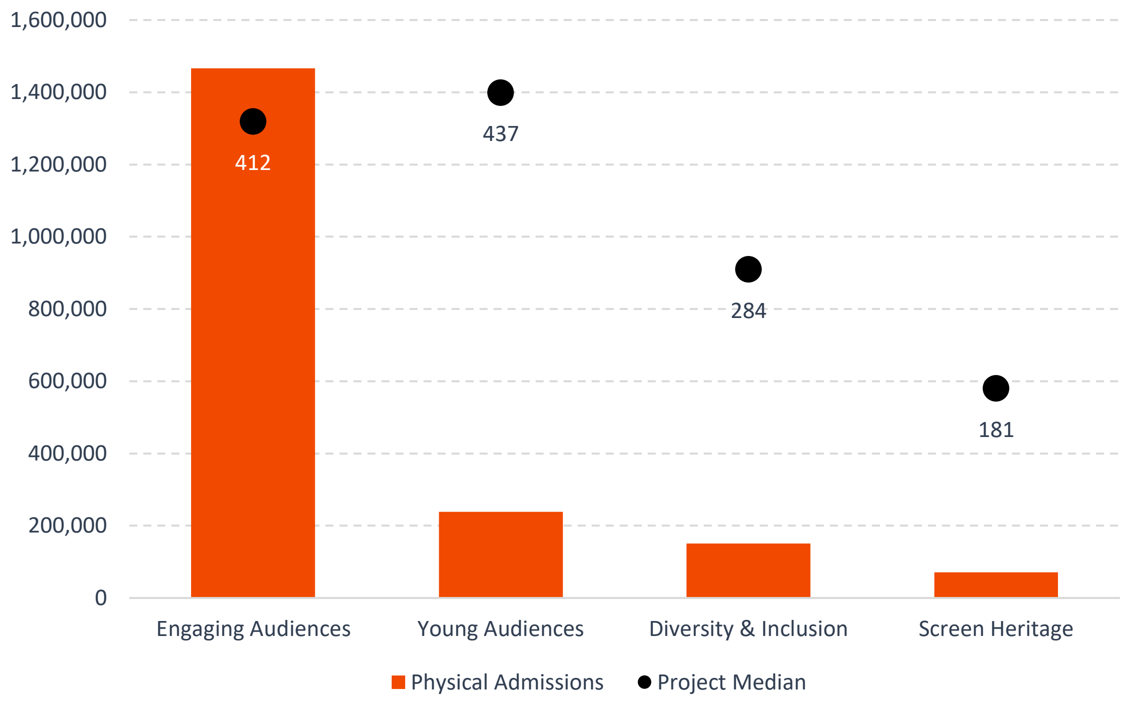


Figure 20. Total Audience Admissions – By Project Strand

PROJECT STRAND	PHYSICAL ADMISSIONS	MEDIAN ADMISSIONS	MAX ADMISSIONS	# OF PROJECTS
Young Audiences	238,874	437	20,061	153
Engaging Audiences	1,466,053	412	75,352	726
Screen Heritage	71,176	181	7,395	101
Diversity & Inclusion	151,128	284	12,757	216
TOTAL	**1,927,231**	**377**	**75,352**	**1,196**

Source: British Film Institute. Analysis by Culture Counts. Median project admissions exclude projects with no physical admissions. Projects categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis.

Figure 21. Percentage of Project Type – By Hub

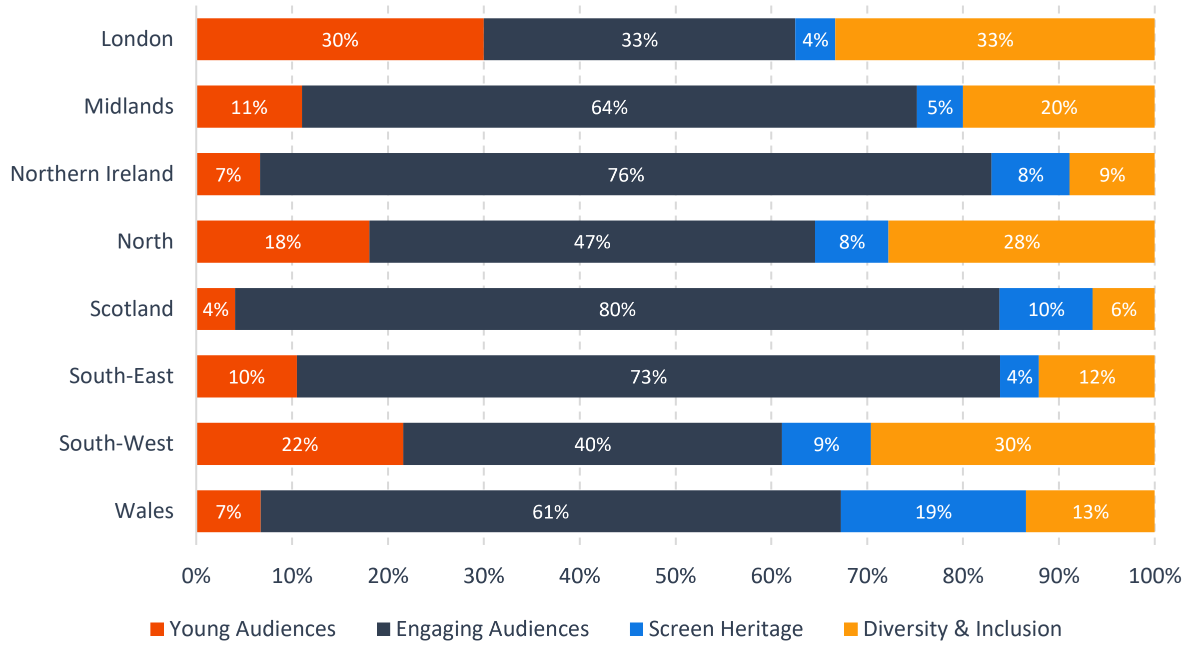


Figure 22. Total Projects - By Strand and By Hub

HUB	YOUNG AUDIENCES	ENGAGING AUDIENCES	SCREEN HERITAGE	DIVERSITY & INCLUSION	TOTAL
London	36 (30%)	39 (33%)	5 (4%)	40 (33%)	120 (100%)
Midlands	16 (11%)	93 (64%)	7 (5%)	29 (20%)	145 (100%)
N. Ireland	9 (7%)	103 (76%)	11 (8%)	12 (9%)	135 (100%)
North	26 (18%)	67 (47%)	11 (8%)	40 (28%)	144 (100%)
Scotland	10 (4%)	197 (80%)	24 (10%)	16 (6%)	247 (100%)
South-East	13 (10%)	91 (73%)	5 (4%)	15 (12%)	124 (100%)
South-West	35 (22%)	64 (40%)	15 (9%)	48 (30%)	162 (100%)
Wales	8 (7%)	72 (61%)	23 (19%)	16 (13%)	119 (100%)
TOTAL	**153 (13%)**	**726 (61%)**	**101 (8%)**	**216 (18%)**	**1,196 (100%)**

Source: British Film Institute. Analysis by Culture Counts. Projects with no physical admission or those categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis.

Engaging Audiences included 76% of all admissions across the five years. It was a broad category that encompassed a wide range of audience development activity. During Covid-19, most projects were categorised in this seemingly more generic strand, perhaps as there was a rush to pivot to online and less clarity on any other specific target audience.

Admissions within this strand began to recover but remained 39% down by 2022 (2021/22 vs 2018/19). However, median average admissions by project had almost recovered by 2022 (-14% vs 2018/19).

As audiences began to recover post-Covid, **younger audiences** were reported as significantly over-indexing on cinema attendance (42% of cinemagoers were 16-34s vs representing 30% of the audience population[24]) but total admissions within the **Young Audience** project strand remained 83% lower than pre-Covid (2018/19) admissions: the least successful recovery in terms of total admissions.

Many Hub members reported in interviews focusing projects on younger audiences, but this did not appear to have delivered corollary relative recovery in admissions, perhaps demonstrating a discrepancy between the commercial and the independent exhibition sectors: Wave III of the BFI audience tracking study showed that independent cinema attendance was down 15% in July 2022 vs pre-pandemic, the largest decline of any film type[25]. In addition, independent films were more likely to have been watched at home (26%) then on a big screen (11%).

Projects aimed at Young Audiences had the overall highest median average admissions per project, demonstrating good success in projects achieving reach as per FAN aims. In addition, as will be analysed below (in 2.4.2), the overall target for under 30s audiences was exceeded (21% vs 19% target).

Some members did report struggling to get young audiences back: Malvern Cinema put on a skateboarding film with enhanced Q&A activity with the artists (meeting FAN aims for enhanced experience) for 16-30s:

> *It wasn't as successful as we hoped it would be. I think we had an audience of about 50. We were hoping for more. But then they were 50 people that had never been to Malvern Cinema before."*
>
> Malvern Cinema, South-East Hub region

They are now planning a young people's membership scheme, aware that price might be a barrier to under 30s.

Several members were targeting primary schools as a way of "cultivating" those future young audiences by "getting into their life early" (*Northampton Film Festival, Midlands*).

FAN funding supported marketing campaigns to reach younger audiences that would not otherwise be possible, such as developing an Instagram profile and creating video content:

> *The online presence and the online content that we created has been very important to us [in attracting a younger audience]"*
>
> Nerve Centre, N.Ireland

Members' work with young people is often a complex and rich interweaving of projects and strands (film making, programming, audiences, volunteers) both within and beyond FAN, and the integration of this activity was challenging in light of the different outcomes described by different funders or programmes.

[24] *BFI 'Watching Films in the UK: How often, how many and how?' Wave III report, July 2022*

[25] *Ibid*

> *There's a lot of overlap that can happen […] in how FAN fits with Industry and Skills, fits alongside Film Academy and education. […] We're constantly having to thread out the projects that belong to BFI and the projects that belong very much to [FAN funded projects]."*

Nerve Centre, N.Ireland

Diversity & Inclusion classified projects had the lowest average median admissions per project overall but showed the strongest relative recovery towards pre-Covid levels.

Several members reported in interviews that FAN funding had given them the confidence to take risks with programming and the financial support to market these screenings, which they felt was crucial in diversifying audiences.

> *[If you want to diversify audiences] you have to be prepared for those screenings to fail."*

Rio Cinema, London

> *BFI funding […] gives our film programmer that excuse to be able to programme [something] that we know full well that we are not going to attract a large audience for, but we're able to say we've got financial funding towards keeping this diverse programme."*

Malvern Cinema, South-East

In Scotland, FAN funding enabled a film festival to commission some audio description.

> *Lack of audio description in a lot of cases presents barriers to audiences, but also the amount if costs to create is a barrier for exhibitors…It meant that we could get all of the films captioned with descriptive subtitles which removed another barrier."*

Member organisation, Scotland

Fabrica in Brighton was enabled to work in partnership with Oska Bright Film Festival, who work with those with learning disabilities.

Many members felt that FAN's aim to grow a diverse audience was aligned with their own inclusion values and objectives.

In addition, member training supported Members to develop programmes for D/deaf and disabled audiences which in turn resulted in growing audiences: Magic Lantern cinema in west Wales undertook online D/deaf and disability awareness training and then invited the trainers into the cinema to train all the staff. This led to an Access Open Day which, although numbers were low, led to the establishment of a Cinema Access Advisory Group, comprising individuals with a range of disabilities and an ongoing invitation on marketing materials to ask questions and engage. In rural areas of low population density, as mentioned above, FAN investment allowed cinemas to cater for what can be very small numbers of targeted under-served audiences who would otherwise not have had the opportunity to attend.

Although **Screen Heritage** had the smallest number of projects in total (102), median average far surpassed pre-Covid-19 levels (490 in 2021/22 vs 207 in 2018/19) and by 2022 was on a par with the other project strands. Screen Heritage projects specifically addressed the FAN priority to increase access to the UK's screen heritage and was perceived to have had a key role in placemaking (see *Impact of FAN*, 4.2.5 below).

Audience Survey Data Collection

Information about the profile of attenders was gathered via audience surveys, provided by FAN, with responses collected from attenders, usually as a link to an online survey, sent out by members. Some projects also used paper surveys and uploaded the results to the survey software themselves.

In common with other survey methodologies, there is a danger of under coverage or non-response bias[26] in the audience surveys, particularly as some of the personal data collected is sensitive. Younger people and those on lower income are statistically less likely to complete surveys[27], and language or cultural barriers were reported by some members to have reduced completion amongst some target respondents.

In addition to collecting demographic information, the surveys also sought to gather insights into audiences' experiences by asking questions about the impact of the projects on various aspects of their film-viewing journey, ranging from their exposure to new types of films to their sense of connection and welcome at the event venue. Although these align very approximately with the FAN aim to create more "in-depth" experiences, these metrics did not directly relate to the outcome framework.

Although surveys were carried out on 42% of projects overall, there was no consistent sampling methodology to ensure that these results were truly representative, so they should only be viewed indicatively or to show relative differences within the results.

The following section provides additional detail and insight on each target audience group, alongside year-on-year data.

Figure 16 shows the year-on-year survey completions for the FAN project as a whole. The low number of survey responses in 2020/21 was due to the Covid-19 pandemic, when most cinemas remained closed.

Figure 17 shows the survey completions of audience-facing projects by Hub. Rates of completion of audience surveys varied by Hub and there were common reports of audience survey fatigue and difficulties achieving survey responses from Members when interviewed. For example, one Member reported in their interview that their use of QR codes and email surveys wasn't really working for their audiences, and they weren't responding so they "took it to paper surveys and just did [them] ourselves".

[26] *Guidry, K.R., 2014. 'Non-response bias on web-based surveys as influenced by the digital divide and participation gap'. Indiana University.*

[27] *Cartwright, E., Davies, J.S. and Rose, J., 2021. 'Trust to the Scientists: Intention to Complete the 2021 Census in England and Wales'. SSRN.*

Figure 23. Total Audience Survey Responses by year

YEAR	2018/19	2019/20	2020/21	2021/22	2022/23 (Q1-3)
# of Projects w/ Survey Responses	268 (72%)	237 (67%)	43 (18%)	133 (49%)	113 (40%)
# of Survey Responses	31,609	25,071	1,632	13,755	5,167
Median # of Survey Responses Per Project	48	49	15	21	21

Source: British Film Institute. Analysis by Culture Counts.

Figure 24. Total Audience Survey Responses by Hub

HUB	# OF AUDIENCE-FACING PROJECTS	# OF EVALUATED PROJECTS	# OF SURVEY RESPONSES
London	141	98 (70%)	15,703
Midlands	172	99 (58%)	9,014
N. Ireland	167	84 (50%)	2,966
North	163	73 (45%)	8,668
Scotland	359	148 (41%)	8,510
South-East	145	89 (61%)	14,144
South-West	210	131 (62%)	15,270
Wales	157	72 (46%)	2,959
TOTAL	**1,514**	**794 (42%)**	**77,234**

Source: British Film Institute. Analysis by Culture Counts.

2018/19 evaluated the highest proportion of projects of the five years (72%). This then declined year-on-year (with an inevitable low in 2020/21 of 18% due to the pandemic). In 2021/22 just under half of the projects were surveyed. The decline in the median number of surveys per project is further evidence of an increasing struggle to survey audiences.

This struggle came through in many of the Hub manager and member interviews, with drivers including:

- perceived **audience survey fatigue**

- a struggle to persuade people to complete surveys when they are only online (some preferring paper surveys, as previously mentioned)

> *It's really hard to get audiences to do the digital copies."*
>
> Exeter Phoenix, South-West

> *Everything went online after Covid. We had really, really low rates of filling in surveys."*
>
> Dundee Contemporary Arts, Scotland

- perceived **increasing survey burden**, including from additional funders

- overly **long and intrusive surveys**

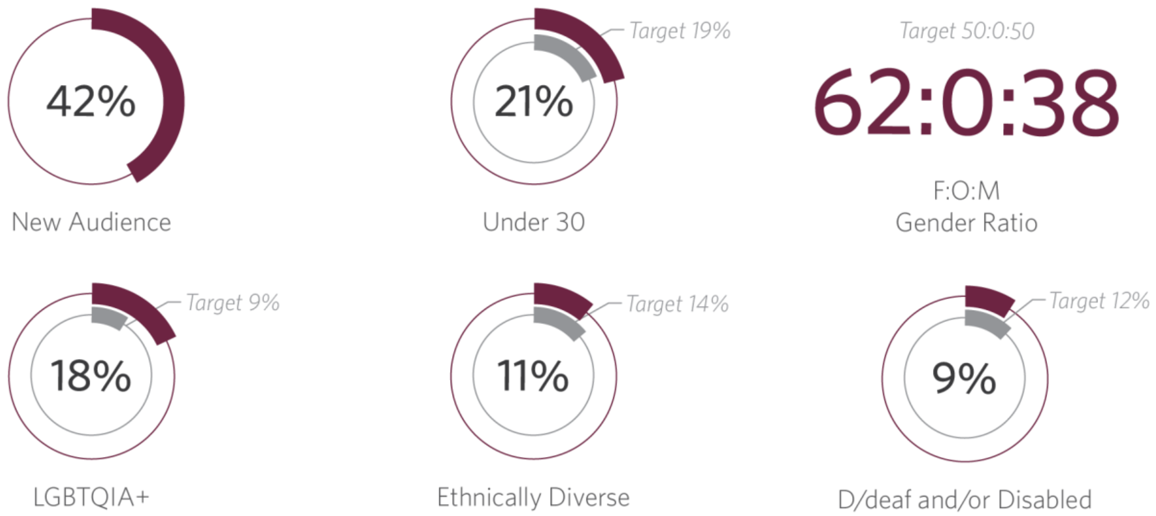
> *It's quite long and [...] there are a lot of questions about identity which I feel a little bit uncomfortable with."*
>
> Member organisation, Scotland

- **lack of tailoring** of surveys to audience need (e.g. language barriers)

Tackling these concerns about surveying will be critical in ensuring FAN aims can be monitored going forward. Opportunities to co-create survey methods and tools may help increase response rates.

Audience Profile

AUDIENCE PROFILE - PROJECT MEDIAN AVERAGE



Demographic questions included in surveys were age, first-time visitation, gender, sexuality, ethnicity, and disability status. These metrics were alluded to in the FAN aims of diversifying audiences, but targets would have benefitted from more clarity and greater contextualisation, for example comparisons with regional and national population statistics. This could have also alleviated some member and Hub concerns about blanket targets which did not acknowledge the geo-demographic differences across the UK.

Results presented here are the median average result achieved for each year (as explained above), representing the typical result achieved for each project that distributed an audience survey as part of their event. As outlined in Figure 24, only 42% of projects overall were surveyed.

Figure 25. Year-on-Year Engagement - Median Results

PROFILE	18/19	19/20	20/21	21/22	22/23 (Q1 - Q3)	OVERALL
New Audience	40%	45%	33%	39%	44%	42%
Under 30	23%	25%	13%	15%	17%	21%
Gender (F:O:M)	61:0:39	62:0:38	67:0:33	63:0:37	59:0:41	62:0:38
LGBTQIA+	14%	14%	19%	22%	34%	18%
Ethnically Diverse	11%	10%	11%	11%	17%	11%
Disability	8%	8%	11%	11%	9%	9%

Source: British Film Institute. Analysis by Culture Counts. Note that results here report the median result, which is calculated per project. 28 ≤ number of surveys ≤ 273.

The percentage of **new audiences** was beginning to increase a little pre-Covid (increase from 40% to 45% in first two years), but the pandemic hit these proportions. It is nevertheless encouraging that even during the pandemic closure year of 2020/21, a third of audiences were new. New audience proportions showed good recovery, returning to 2019/20 figures by 2022. There was no target set for new audiences; given that a key FAN aim was to introduce new audiences and extend the reach of the programme, this will be crucial going forward.

The percentage of **under 30s** was also slightly rising pre-pandemic and started to recover to close to pre-pandemic levels by 2022. Despite the impact of Covid-19, the overall target for under 30s audiences was exceeded (21% vs 19% target) which is testament to the Hubs' and members' focus on and increasing confidence in younger audiences. Many interviews talked about a younger audience focus, and guidance on engaging with younger audiences was also provided by FAN. This part of FAN's aims directly aligns with BFI priorities around younger audiences (although there is some inconsistency in the framework between 16-30s and 16-19s which would benefit from clarification).

The survey data consistently showed a higher percentage of female attendees (62%) compared to male attendees (38%), with no representation of other **gender** identities. It is worth noting that survey respondents frequently demonstrate bias towards females, so this *may* be skewing these figures[28]. Overall cinema going statistics from BFI showed equal male/female attendance, but this may not apply to the independent sector, where it appears that more women than men attended. For future years, it would be beneficial to consider a more statistically robust approach to surveying: if it is true that the gender skew differs in independent film, this would be an important finding.

The representation of **LGBTQIA+** attendees showed a marked increase over the years, reaching 34% in 22/23, suggesting an increasingly successful focus on these audiences. 180 projects selected a focus on LGBTQIA+ audiences in the log. Although, as previously mentioned, this recording is inconsistent, it is the only way to try and identify a particular focus on this target group. Where high proportions of LGBTQIA+ audiences were achieved (based on survey results), projects were very specifically targeted at this audience, for example Fringe! Queer Film and Arts Festival, Africa in Motion's Queer Africa, and Leeds Queer Film Festival. There has been a steady increase in

28 For example, Smith, W. 2009. Does Gender Influence Online Survey Participation? https://files.eric.ed.gov/fulltext/ED501717.pdf the number of projects logged with this focus from 18 in 2018/19 to 51 in 2021/22 and 50 in 2022/23. This growth appears to have been very successful in increasing this target audience.

The percentage of **ethnically diverse** attendees also saw growth, particularly in 2022/23 (Q1-Q3), where it increased to 17%. Again based on the logs, there has been an overall increase in projects focused on ethnically diverse audiences. In 2018/19, 60 projects logged that this was at least one of their areas of focus; this dipped a little in 2019/20 (48) but then steadily increased to 88 in 2022/23, again demonstrating that Film Hubs increasing the focus on funding projects who are consciously trying to reach more diverse audiences can achieve success.

The proportion of **disabled** attendees remained relatively consistent, showing good recovery post-pandemic. Although this was some way off target, this recovery was better than reports around cultural activities may have suggested[29]; often, disabled audiences have been slower to return to activities in person, in part due to increased vulnerability to Covid-19 for some disabled people. The number of projects reporting some element of focus on disabled audiences varied across the five years (minimum 13 in 2018/19; maximum 72 in 2021/22). It is worth noting that interviews with members regularly reported developing programmes and services for disabled audiences, but these were often very small, targeted groups. Comparison to the population statistics (18% England, 21% Wales) shows that there is still work which could be done to increase engagement of disabled audiences.

The following table summarises the median average results for each Hub, in aggregate for the 5-year period.

Figure 26. Engagement – Median Average Results by Hub

HUB	NEW AUDIENCES	UNDER 30	GENDER (F:O:M)	LGBTQIA+	ETHNICALLY DIVERSE	DISABLED
London	50%	30%	61:0:39	24%	41%	8%
Midlands	43%	15%	59:0:41	15%	14%	9%
N. Ireland	43%	25%	59:0:41	16%	3%	9%
North	40%	16%	63:0:37	15%	10%	11%
Scotland	43%	26%	67:0:33	20%	7%	8%
South-East	31%	12%	61:0:39	17%	11%	9%
South-West	43%	27%	63:0:37	19%	16%	8%
Wales	31%	13%	60:0:40	11%	7%	13%
MEDIAN AVERAGE	**42%**	**21%**	**62:0:38**	**18%**	**11%**	**9%**

Source: British Film Institute. Analysis by Culture Counts. 72 ≤ number of surveys ≤ 148.

London demonstrated the highest percentage across all audience diversity metrics except for disability. The city's young and diverse population provided a more available audience to access than some other Hubs; for example, in N.Ireland, only 3.4% of people identified as Asian, Black,

29 For example, The Audience Agency research In May 2022 showed disabled audiences were less likely to be happy to attend than non-disabled audiences (29% vs 41%) https://www.theaudienceagency.org/evidence/covid-19-cultural-participation-monitor/equity-and-access/disabled-audiences-post-covid 'mixed' or 'other' ethnicity (using terminology from the census) compared to 46% of people in London. However, where diversity figures were higher, there was anecdotally also investment in diverse-led organisations. Information on organisation or project leadership is not recorded in the data set; one recommendation for improvement is to record this information in order to monitor allocation of funds as well as measuring audience profiles.

Although N. Ireland demonstrated the lowest percentage of ethnically diverse attendees (3%), this was therefore in line with the population. London's 41%, by far the highest across all Hubs, was also almost in line with the regional population statistic. We recommend adopting a census comparative KPI for every region or nation to measure progress in a more granular and relevant way.

The South-East and Wales report the lowest percentages of attendees under 30, at 12% and 13% respectively. This could indicate the need to refocus projects targeted at younger audiences, although some low survey sample sizes suggest caution (for example, in Wales, only three of the projects specifically targeting Young Audiences had more than 5 survey returns). Given that projects specifically planned to reach younger audiences on average achieved the highest rate of under 30s (see Figure 24 below), shifting some funding decisions to support projects with this focus should improve the overall proportion of younger audiences.

Wales had the highest disability representation at 13%. According to the logs, 12% of all projects in Wales had some focus on disabled audiences which could explain their strong result; however, the next best performer (the North at 11%) logged only 2% of projects with a focus on disabled audiences. As explained above, we have not analysed these "secondary focus areas" as the use of them was inconsistent; more consistent use of these sub-categories would allow more effective analysis. Comparison to census data shows that Wales has a slightly higher proportion of disabled population, but only by a small amount (21% vs 18% in England overall). All regions and nations also reported effective projects targeted at disabled audiences during interviews.

Overall, the data highlights the importance of tailoring FAN-funded project strategies to the unique demographic characteristics and needs of each Hub to maximize their impact and inclusivity. It also exposes some of the challenges in the current data collection in terms of sample sizes achieved and information logged as it is hard to uncover drivers for stronger achievement against target audience groups.

Figure 27. Engagement – Median Average Results by Project Strand

PROJECT STRAND	NEW AUDIENCES	UNDER 30	GENDER (F/O/M)	LGBTQIA+	ETHNICALLY DIVERSE	DISABLED
Young Audiences	45%	40%	61:0:39	18%	16%	8%
Engaging Audiences	36%	18%	62:0:38	16%	8%	9%
Screen Heritage	48%	11%	60:0:40	12%	5%	5%
Diversity & Inclusion	48%	25%	63:0:37	25%	32%	32%
MEDIAN AVERAGE	**42%**	**21%**	**62:0:38**	**18%**	**11%**	**9%**

Source: British Film Institute. Analysis by Culture Counts. 52 ≤ number of surveys ≤ 434.

Overall, projects focused on particular audiences delivered greater proportions of relevant demographics, showing the value of encouraging this focus in planning projects.

Despite smaller numbers of projects (see above), **Screen Heritage** met the FAN aim of increasing access to this material with almost half the audiences being new. **Young audiences** were particularly low in Screen Heritage projects, however, at only 11%. One London member attested to the challenges in attracting younger audiences to screen heritage:

"London is such a rich city for cinema and we've unfortunately lost some great cinema buildings over the years […] it would be great to somehow re-engage young audiences in showing them how filled with film the city is and doing that through archive. […] You're always going to find an old audience, who remember particular cinemas, a particular film night […] but how do you get young people engaged?" (*We Are Parable*, *London*).

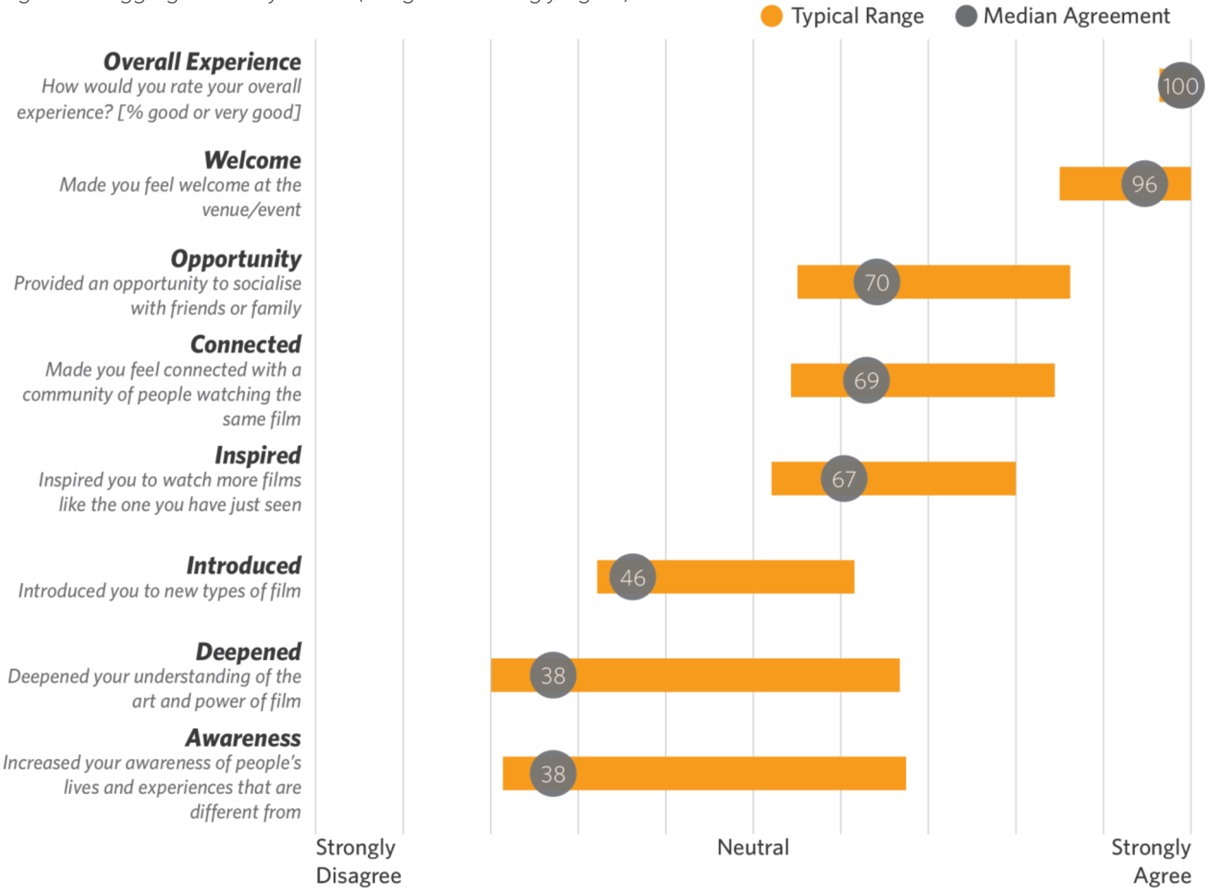
Diversity & Inclusion projects achieved strong proportions of under-served audiences, whether based on ethnicity, sexuality or disability. The number of projects classified in the Diversity & Inclusion strand was 18% overall, and these projects achieved 8% of total admissions. Given the range of types of audience diversification, there may have been scope to increase the proportion of overall projects targeting this area; as well as the potential to include a small number of larger projects to deliver a more proportionate level of admissions overall.

Audience experience

Respondents were asked to indicate whether any of seven key statements applied to their film experience. This was asked alongside a question regarding their overall experience, with five options provided ranging from 'very poor' to 'very good'.

The following figures present an overview of these audience responses, with interquartile ranges and median result calculated for each metric. The interquartile range represents the spread of typical result for each project evaluated, providing a clear understanding of the variation in audience experiences.

Figure 28: Aggregate Survey Results (% Agree or Strongly Agree)



233 ≤ number of surveys ≤ 685.

Figure 29. Aggregate Level of Agreement with Outcome statements

METRICS	TYPICAL RATES OF AGREEMENT	MEDIAN AGREEMENT	SURVEY COUNT
Introduced Introduced you to new types of film	32% - 62%	46%	685
Inspired Inspired you to watch more films like the one you have just seen	52% - 80%	67%	697
Awareness Increased your awareness of people's lives and experiences that are different from yours	21% - 68%	38%	659
Deepened Deepened your understanding of the art and power of film	20% - 67%	38%	660
Connected Made you feel connected with a community of people watching the same film	54% - 84%	69%	236

Welcome Made you feel welcome at the venue/event	85% - 100%	96%	239
Opportunity Provided an opportunity to socialise with friends or family	55% - 86%	70%	233
Overall Experience How would you rate your overall experience? [% good or very good]	96% - 100%	100%	242

Source: British Film Institute. Analysis by Culture Counts. Typical range represents the Interquartile Range of results. 233 ≤ number of surveys ≤ 685.

High levels of agreement were reported for the "Welcome" and "Opportunity" metrics, with median average results of 96% and 70% respectively. Not all FAN members were in control of the venues they exhibited at, so it is encouraging that audience experience was generally positive. "Connected" (69%) and "Inspired" (67%) also produced high levels of agreement. The "Overall Experience" metric also reflected positively on the projects, with a median average result of 100% for good or very good experiences.

The "Introduced" produced a median average agreement of 46%, similar to levels of new audiences identified elsewhere within the survey. The "Deepened" and "Awareness" statements received median results of 38% each, suggesting opportunities to develop what an "in-depth cultural experience" (as specified in FAN's aims) might look like.

Examples of increasing the depth of the film viewing experience were captured through interviews, for example:

> *We create experiences around our screenings that are linked to the to, what's happening in the film […] We'll have musical performances, spoken word performances. Sometimes, it's as simple as a Q&A. Sometimes it's a large exhibition. So, really trying to create experiences, around films that enable audiences to have a deeper emotional connection with the film. Because what we believe is that, if you have that emotional engagement with the film, you're more likely to tell other people about it and thereby and providing the awareness of the film."*

We Are Parable, London

Only some of the audience survey metrics mapped directly onto the FAN framework, so - especially in light of the challenges in achieving survey responses - it could in future be helpful to reduce metrics and focus on the main outcomes that align with FAN aims (e.g. Introduced, Deepened); alternatively, it would be helpful to understand how the other metrics contribute to the overall aims and plot these into the framework.

Figure 30. Median Level of Agreement with Outcome Statements by Project Strand

METRICS	YOUNG AUDIENCES	ENGAGING AUDIENCES	SCREEN HERITAGE	DIVERSITY & INCLUSION
Introduced Introduced you to new types of film	46%	45%	37%	50%
Inspired Inspired you to watch more films like the one you have just seen	65%	67%	65%	66%
Awareness Increased your awareness of people's lives and experiences that are different from yours	30%	35%	53%	46%
Deepened Deepened your understanding of the art and power of film	40%	38%	33%	37%
Connected Made you feel connected with a community of people watching the same film	78%	67%	84%	69%
Welcome Made you feel welcome at the venue/event	96%	97%	96%	91%
Opportunity Provided an opportunity to socialise with friends or family	69%	70%	74%	70%
Overall Experience How would you rate your overall experience? [% good or very good]	100%	100%	100%	100%

Source: British Film Institute. Analysis by Culture Counts. 45 ≤ number of surveys ≤ 730.

Across all project strands, overall experience was consistently excellent, with 100% of respondents having reported a positive experience (% good + very good).

Young Audiences strands were most likely to deliver on 'Deepened' metric which was backed up by member interviews where enhanced events (e.g. Q&As with creatives) were frequently targeted at young people's screenings.

Despite the positive new audience figures, **Screen Heritage** recorded lower percentages for 'Introduced', perhaps as the types of film were familiar to many people. However, it delivered very well against 'Awareness' and 'Connected', as well as performing the strongest for 'Opportunity'. These metrics point towards the role of Screen Heritage in community building and place making, uncovered in interviews and explored in *Impact of FAN*, below.

2.4 Member Support

There were two ways in which the sector was supported: FHLOs supporting members through advice and activities; FAN funding given to members to undertake projects or activities to help meet the aims of FAN in building capability and confidence.

Headlines

- The FAN structure delivered extremely well on its aims to create a more connected and confident sector. As well as very high satisfaction ratings in the surveys, the benefits of the network in offering accessible support and advice was a strong emerging theme in interviews, and was seen as a unique funding and support structure.
- 740 member support projects were run, achieving almost 10,000 individual contact points[30] with industry professionals from member organisations. Recording of these numbers was, however, not consistent across Hubs, limiting comparative analysis.
- There were some challenges with FAN funding structures: single-year funding agreements; the lack of a clear pathway for organisations to transition to national centralised funding sources; and a one-size-fits-all approach which sometimes did not fit their specific work. *It is worth noting that some of these challenges have been addressed by changes to funding structures for the next period of FAN.*

Recommendations

- Although member surveys captured satisfaction and increases in confidence and capability in line with the outcome framework, it would be beneficial to include indicators to monitor 'connectedness' which is mentioned in the FAN aims and is a positive outcome of the programme.
- Multi-year funding opportunities would benefit many organisations to enable longer-term planning; Hubs could also offer more guidance on transition strategies from FAN to national programmes of funding, considering how funding programmes could offer a bridge for those organisations who have the ambition to grow in this way.
- Create clearer guidance for recording of member interactions in order to enable consistent monitoring of member support across all regions and nations.

Member Support Projects

Member Support projects included a range of activity designed to meet FAN's aim of building knowledge and capacity within the membership. Example projects included training bursaries, network meetings and conference-style events. In addition, ongoing support was provided through emails and phone calls to individual FAN members, and resources were developed to provide additional support, sometimes enabling individual Hub member support activity to be rolled out across the whole of FAN.

The table below shows the number of projects and member beneficiaries by Hub. It is important to note that methods of recording number of beneficiaries varied by Hub; for example, in Wales, the Film Hub monitored calls, meetings and emails with specific members that were supported by their fund, or where they had significant support outside of funding. Film Hub Wales reported that they started monitoring these contacts to ensure that reporting captured the amount of time they spent working with the membership to offer guidance. However, this approach was not consistent across all Hubs, so meaningful comparison between Hubs is difficult.

[30] This does not represent unique individuals as the same individual could have accessed multiple member support opportunities e.g. a bursary and a network meeting.

The South West recorded the highest number of projects and beneficiaries, particularly driven by a conference-based event and online resources. Developing online resources is a method which several hubs have used to provide support to a wide range of members:

> *The South west is a very large geographic region with poor transport links so we knew from the start that we needed to provide an online space for conversations, access to resources for members only etc […] We've developed the website as well as The Bigger Picture for FAN in house as we have that expertise at Watershed and want to ensure members can access resources online and so that we can showcase their work online and ensure they can get inspiration from other regions.*
>
> Film Hub South West

Figure x. Member Support projects by Hub

HUB	NUMBER MEMBER SUPPORT PROJECTS	NUMBER MEMBER BENEFICIARIES
London	112	1,989
Midlands	101	947
N. Ireland	57	49
North	114	674
Scotland	140	1,102
South East	160	379
South West	202	2,618
Wales	100	2,028
TOTAL	740	9,786

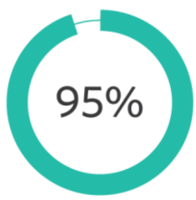
Member Outcomes

MEMBER SURVEY RESULTS

716

Total member responses

Agreed that FAN improved their ability to deliver events



Agreed that FAN improved their programming confidence

Member satisfaction was used to assess performance and as an indicator of areas of improvement. The sector profile analysed member survey responses, comparing year-on-year results of member satisfaction. This offers insights into the overall satisfaction levels of Hub members, as well as regional and project-based disparities.

Figure 31 shows the year-on-year results for member satisfaction, indicating the percentage of members who reported being "very satisfied." Figure 32 provides an overview of the aggregate member results by Hub, indicating the number of responses collected and the percentage of projects with responses, as well as the percentage of very satisfied members.

Figure 31. Year-on-Year Results – Member Satisfaction

YEAR	2018/19	2019/20	2020/21	2021/22	2022/23 (Q1-3)
% Very Satisfied	82%	87%	88%	85%	74%
# of Responses	237	210	71	113	77

Source: British Film Institute. Analysis by Culture Counts.

Figure 32. Aggregate Member Results – by Hub

HUB	# OF RESPONSES	% OF PROJECT W/ RESPONSES	% VERY SATISFIED
London	86	23%	74%
Midlands	96	24%	75%
N. Ireland	72	22%	96%
North	80	20%	79%
Scotland	112	18%	90%
South-East	70	17%	73%
South-West	95	17%	88%
Wales	98	25%	90%
TOTAL / AVERAGE	**709**	**21%**	**83%**

Source: British Film Institute. Analysis by Culture Counts.

Over the five evaluated years, the percentage of members who reported being "very satisfied" remained relatively consistent. The peak satisfaction of 88% came in 2020/21, which could be due to the support offered during the Covid pandemic when members were forced to close or pivot activity rapidly and likely needed additional support. Several members when interviewed commented on the positive impact of online network meetings which were often initiated during that year (as opposed to previous offline meetups), which increased their ability to attend and supported them at a very difficult time; others felt the ongoing loss of in-person meetings prevented informal conversations with colleagues from other organisations and limited intra-region learning.

Interviews with members identified particular strengths of the FAN structure that delivered on FAN aims.

Hubs were seen as a critical point of contact and support and members had honest, open relationships with Hub managers and staff; many mentioned the benefit of having a named contact and a close relationship and saw them as partners rather than funders.

> *It's felt very much like they've been a partner in, and we've been able to [..] speak very honestly about the worries […] They're really open to being told, 'I don't know the answer to this problem. The Hub has very much been with us on a journey as we've tried stuff out and…quite honestly at times, I said, I don't know how this works and Sally's been a really helpful sounding board.*

Hyde Park Picture House, North

Hubs were praised for their proactive approach to funding projects and there was a perception that they would fund what others wouldn't. FAN was seen by many members as a unique model that is focused on long-term support and success, creating lasting change in capability and capacity in line with its aims, despite limits on funding to only one year.

> *There's definitely a completely unique model. I feel really fortunate."*

Exeter Phoenix, South West

> *They communicate well they're very engaged and you know, they'll kind of come up with ideas.*

Belfast Film Festival, N.Ireland

Funding limitations and structures did not suit every organisation, however, and there were some challenges.

> *The majority of the FAN and BFI investment is set up for people who are directly responsible for programming their venue. We have had to be really collaborative with our approach to programming and that hasn't always been understood and it hasn't always been valued highly enough.*

Creative Arts East, South East

Levels of funding were considered low by most members and while some reported that even the smallest amount of money could make a big difference, some felt that funding was not adequate to match expectations. This was particularly marked for those who worked in multi-arts venues and received other major public funding, for example Arts Council England.

> *The BFI invests 10% of the amount contributed by Arts Council NPO, which doesn't reflect the correct level of core and delivery support that is needed to maintain our cinema work effectively,*

meaning that we have to underwrite these costs with other fundraising. This adds real pressure.

Creative Arts East, South East

For organisations that were being strategically funded by Film Hubs and wanted to grow into larger, national organisations, the bridge to larger-scale BFI funding was challenging. We Are Parable, in London, was a rare example of success in this area. A more common challenge was how to fund growing organisations who had developed beyond the remit of FAN (e.g. working across multiple counties), but were not working nationally and so were ineligible for the BFI Audience Fund.

Member Outcomes by Project Strand

The following tables present the year-on-year results and Hub results for three outcomes: improved programming archive film, attracting diverse audiences, and attracting young people across the five evaluated years. The percentages indicate the proportion of respondents who agreed with each statement. These three metrics align with three of the audience-facing project strands, ensuring targeted activity to grow member skills and confidence to achieve overall FAN audience aims.

Figure 33. Year-on-Year Results – Member Outcomes

OUTCOME AGREEMENT	2018/19	2019/20	2020/21	2021/22	2022/23 (Q1-3)
Improved Confidence In Programming Archive Film	94%	91%	80%	95%	91%
Improved Confidence In Attracting Diverse Audiences	93%	86%	89%	94%	86%
Improved Confidence In Attracting Young People *	100%	92%	84%	91%	95%
# of Responses	*2 - 226*	*13 - 202*	*5 - 70*	*19 - 109*	*11 - 82*

Source: British Film Institute. Analysis by Culture Counts. 2 ≤ number of responses ≤ 226.
**Note only two members responded to the outcome about 'attracting young people' in Year 1 and thirteen in Year 2. Only five members responded to the outcome about programming archive film in Year 3.*

Figure 34. Aggregate Project Strand Results - Member Outcomes

HUB	PROGRAMMING ARCHIVE FILM	ATTRACTING DIVERSE AUDIENCES	ATTRACTING YOUNG PEOPLE
London	100%	95%	90%
Midlands	100%	95%	94%
N. Ireland	100%	88%	93%
North	90%	87%	97%
Scotland	88%	84%	85%

South-East	82%	88%	88%
South-West	91%	98%	81%
Wales	94%	86%	93%
AVERAGE	**93%**	**90%**	**90%**

Source: British Film Institute. Analysis by Culture Counts. 129 ≤ number of responses ≤ 689.

All results very strong and consistent, with a slight dip in 2020/21 due to a shift in focus to enabling online activity or managing the pressures of enforced closure, but sample sizes are in some cases extremely small so results should be viewed with caution. In addition, actual project and survey numbers can be very low when split by area of focus.

3 IMPACT OF FAN

3.1 Financial Performance

Cost per head

To monitor the cost-effectiveness of projects, a 'cost per head' (CPH) figure was calculated for each project. The CPH was determined by funding provided and the number of physical admissions a project engages. There are limitations in using CPH as a measure of value for money or "success" of a project. A low CPH favours projects with large numbers of admissions; although reach is one of the FAN objectives, this is in tandem with aims to increase diversity of audiences. More targeted, smaller-scale projects often have higher costs (requiring more staff time, outreach events, access measures and so on) and often – especially at first – generate more modest audiences. However, they still contribute fully to FAN aims (as highlighted above). Therefore, CPH should not be viewed in isolation of the other analyses in this evaluation.

CPH is not a sufficient performance metric for projects without an audience-facing element (as described in Section 1.5), so only audience-facing projects with physical admissions are considered in this analysis.

The following figures plot and visualise the typical range of the CPH metric, by each hub, along with their respective budget strand.

Figure 35. Project Cost-Per-Head: Physical Admissions - by Hub

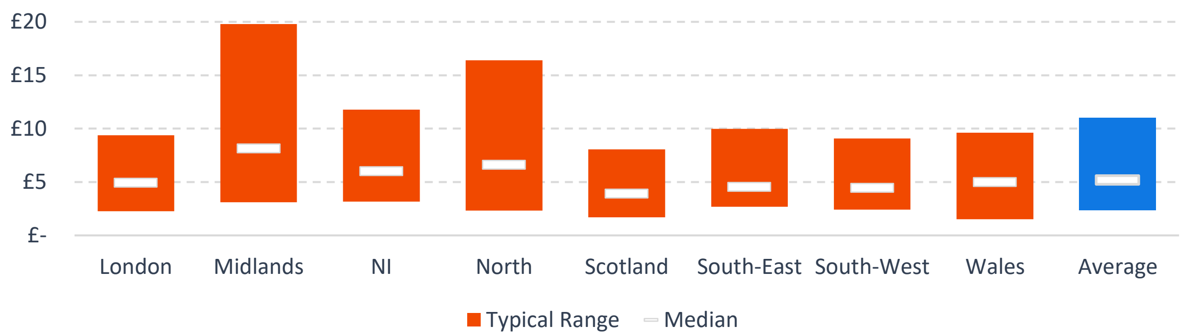


Figure 36. Aggregate BFI Cost Per Head (£) – By Hub

HUB	PHYSICAL ADMISSIONS	AVERAGE GRANT (£)	MEDIAN ADMISSIONS	MEDIAN CPH (£)	TYPICAL RANGE (£)
London	396,557	£4,631	596	4.98	2.28 – 9.38
Midlands	227,637	£5,819	501	8.19	3.12 – 19.78
N. Ireland	128,792	£3,012	170	6.06	3.15 – 11.79
North	334,495	£8,192	500	6.65	2.32 – 16.39
Scotland	213,030	£1,499	249	3.96	1.70 – 8.05
South-East	213,271	£6,060	522	4.59	2.70 – 9.99
South-West	232,415	£3,424	311	4.48	2.42 – 9.09

Wales	181,034	£3,161	341	5.03	1.50 – 9.62
TOTAL /AVERAGE	**1,927,231**	**£4,249**	**377**	**5.19**	**2.38 – 11.03**

Source: British Film Institute. Analysis by Culture Counts. Projects with no physical admission or those categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis. 'Typical range' represents the interquartile range of CPH figures for projects.

Figure 37. Aggregate BFI Cost Per Head (£) – By Stand

HUB	PHYSICAL ADMISSIONS	AVERAGE GRANT (£)	MEDIAN ADMISSIONS	MEDIAN CPH (£)	TYPICAL RANGE (£)
Young Audiences	396,557	£4,682	436	5.08	2.28 – 12.06
Engaging Audiences	227,637	£4,498	411	4.64	2.12 – 9.95
Screen Heritage	128,792	£3,342	182	6.36	3.29 – 13.24
Diversity & Inclusion	334,495	£3,476	284	6.48	2.77 – 13.55
TOTAL /AVERAGE	**1,927,231**	**£4,249**	**377**	**5.19**	**2.38 – 11.03**

Source: British Film Institute. Analysis by Culture Counts. Projects with no physical admission or those categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis. 'Typical range' represents the interquartile range of CPH figures for projects.

The typical range of 'cost per head' within the FAN programme was between £2.83 – £11.03. This means that each physical attendee for a project that was supported by a FAN grant, cost between £2.83 and £11.03. Across all FAN projects, the median average CPH figure was £5.19.

The majority of Hubs reported similar median figures and similar ranges for their CPH. This suggests that the majority of projects that were supported by FAN reported similar levels of physical attendance, in proportion to the grant funding they received.

Scotland reported had the lowest median CPH (£3.96) and smallest CPH range, though this finding is not largely different to the typical range of all FAN projects. For example, where the aggregate typical CPH range of FAN projects was between £2.83 – £11.03, the typical range of projects supported by the Scotland hub was between £1.70 – £8.05. This is only a £1.13 outer deviation beyond of the expected range (14%), as the £8.05 higher threshold sits within the expected range.

By contrast, projects in the Midlands and the North reported the largest range of CPH figures, alongside the highest median CPH figures when compared to other Hubs (£8.19 and £6.65 respectively). The outer deviation for projects in the Midlands is £8.75 (107%) above the higher threshold of the typical range of CPH for FAN projects (£3.12 - £19.78 compared to £2.83 - £11.03). Conversely, the typical range of CPH in the North is beyond the aggregate range in both directions; it is £0.51 (6%) below the range and £5.36 (65%) above (£2.32 - £16.39 compared to £2.83 - £11.03).

In attempting to understand why this could be the case, it could be argued that the programming mix of these two hubs is significantly different from the other eight. If certain types of programming incur different levels of CPH, then this skew could be explained as such. However, when reviewing the typical CPH for projects by budget strand, all ranges appear to correlate with the aggregate CPH range. Similarly, the median CPH for projects based on their budget strand are very similar; with projects supported within the 'Engaging Audiences' strand reporting the lowest median CPH of £4.64, and the 'Diversity & Inclusion' projects reporting the highest median CPH of £6.28; only a £1.84 difference.

Similarly, when considering the number of projects as part of the programming mix (see section 2.3.5), the programming mix for the Midland and North hubs are similar to that of the typical programming mix of most hubs, with only the North hub skewing more towards 'Diversity & Inclusion' projects, at a cost to 'Engaging Audiences 'projects. Additionally, the number of projects supported by the Midlands and North hubs are similar to that of the other hubs (except Scotland), so the larger range for CPH is not related to analysing a smaller number of projects.

Indeed, given that the median CPH figures for the Midlands and North hubs are still within the typical range of the aggregate CPH figures, the most likely explanation for why their respective CPH ranges are larger than other hubs is most likely due to the fact that these hubs supported projects with typically larger grants than other hubs, and that they spent more money on audience-facing projects than other hubs. For example, the average grant for projects in the North hub was £8,192, almost twice the hub aggerate average grant of £4,249.

In regard to the typical CPH range of projects from the Midland hub however, the average grant for projects was only 36% higher than the aggregate average. Respectively then, median admissions for the Midland hub was 25% higher than aggregate average (501 compared to 377). This should result in a typical CPH range that is similar to the aggregate average, however this is clearly not the case. The reason then that the CPH range for the Midland hub is larger than other hubs is related to the number of projects that reported low physical attendance figures during the COVID-19 pandemic. This is detailed further in the following section.

Using the logic applied above, special mention should then be given to the South-East hub, whose average grant to audience-facing projects was the second highest of the cohort (43% higher than the aggregate average), and whose median attendance was similarly larger (38% above the average), yet South-East were able to maintain a similar CPH range of between £2.70 and £9.99, reporting a median CPH of £4.59 (12% lower than the aggregate average).

The following tables go on to report the year-on-year cost-per-head figures for projects, based on their associated Budget Strand. As physical admissions for projects were significantly reduced during Covid-19, it should be expected that the median average CPH figure will increase; with fewer people physically attending activities, the CPH will increase unless there was a subsequent reduction in grant support.

Figure 38. Year-on-Year Median Project Cost-Per-Head (£): Physical Admissions - by Strand

HUB	**2018/19**	**2019/20**	**2020/21**	**2021/22**	**2022/23 (Q1-3)**
Young Audiences	3.36	5.93	2.01 *	6.52	5.72
Engaging Audiences	2.57	4.42	9.14	5.47	5.72
Screen Heritage	5.54	6.84	2.41 *	7.09	13.67
Diversity & Inclusion	5.26	7.19	53.63 *	7.03	8.72
TOTAL	**3.48**	**5.14**	**8.80**	**5.84**	**6.36**

Source: British Film Institute. Analysis by Culture Counts. Projects with no physical admission or those categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis. Note that only 10 projects represent activity reported in the 20/21 period for the strands 'Young Audiences', 'Screen Heritage' and 'Diversity & Inclusion'.

Figure 39. Year-on-Year Median Project Cost-Per-Head (£): Physical Admissions - by Hub

HUB	2018/19	2019/20	2020/21	2021/22	2022/23 (Q1-3)
London	4.63	4.98	9.12	5.96	3.78
Midlands	3.28	4.92	16.13	10.86	7.14
N. Ireland	5.31	6.70	6.76	5.88	9.57
North	2.56	9.98	7.11	8.06	7.91
Scotland	1.85	5.34	2.92	4.12	5.44
South-East	3.86	2.48	8.50	5.65	7.58
South-West	3.82	3.61	8.31	3.65	6.59
Wales	5.03	4.80	2.45	2.76	8.38
TOTAL	**3.48**	**5.14**	**8.80**	**5.84**	**6.36**

Source: British Film Institute. Analysis by Culture Counts. Projects with no physical admission or those categorised as either 'no data expected' or 'unmarked in log' are excluded from the analysis.

The median average CPH saw a significant increase in 2020/21 as limits of physical gathering were put in place during COVID-19. The median average CPH in 2021/22 subsequently recovered, returning to levels similar to that of 2019/20, or £5.84 compared to £5.12 respectively. This suggests that many projects were able to recover to their pre-Covid physical attendance levels. However in respect to Section 2.3.4, it is evident that projects with large attendances did not recover in the same fashion. This suggests a general aversion to attending large-scale events for many participants of the FAN programme, or in fact, that events aimed at large crowds were not simply taking place in 2021/22.

When reviewing data in the 2020/21 period, it is also important to note the fewer number of projects that were taking place in this time period, which will skew median CPH results towards the few that did take place. In respect to Section 2.3.5, only 10 projects were reported in the 2020/21 for three of the four project strands, however there were still enough projects to make the finding of an overall aggregate CPH increase to £8.80 relevant.

As described in the previous note, when reviewing year-on-year data, it becomes clear why projects supported by the Midlands hub results in a higher typical CPH range than other hubs. They reported the highest median CPH in both 20/21 and 21/22, and their 22/23 figure was still 13% above the hub aggregate average. So while the Midlands hub saw positive performance in 18/19 and 19/20, they were slower to recover in 21/22 in terms of physical attendance, and therefore CPH.

One other point of note when reviewing annual CPH, is for the Scotland hub. Scotland achieved the lowest aggregate CPH figure in the previous section of £3.96, but their annual CPH results show them predominately on par with other hubs in 19/20, 21/22 and 22/23. Indeed, the fact that they reported the lowest aggregate CPH of all hubs is due to the significantly higher number of projects delivered in 18/19. As projects in the Scotland hub are also applicable for grant funding sourced from Screen Scotland, it is understood that this result is the occurrence of the Scotland hub delivering 65% more audience-facing projects than the aggregate average (247 compared to 150). The reason however that the median CPH is not proportionally lower however is due to the fact that median admissions for Scotland projects is 34% lower than the hub aggregate average (249 compared to 377). This ultimately ends up balancing out to a median CPH of £3.96 that is only 23% lower than the hub aggregate median (£3.96 compared to £5.19).

Economic Impact

Economic impact concerns the spending related to activities or events that would otherwise not have occurred if not for their delivery. Economic impact analysis looks at the effect of an activity or organisation on the economy, usually in a specific locality or region. It is common to calculate three types of impact:

- Direct impacts by the activities of the organisation or sector itself.
- Indirect impacts created through its supply chain.
- Induced impacts, which are the effects of spending in the economy by those employed by the organisation or its suppliers.

HM Treasury Green Book advises that when evaluating the economic impact of an activity, only the 'additional' economic activity it generates should be considered[31]. This is represented by the direct and indirect economic effects an activity, after taking into 'displacement' and 'deadweight'. Displacement refers to the idea that money spent on an activity could have been spent elsewhere. Deadweight is the portion of the economic activity that would have happened anyway, even without this project. The Green Book suggests measuring impact in terms of Gross Value Added (GVA). GVA ostensibly measures the 'added value' that an activity brings to an economy, by excluding the cost of 'intermediate consumption' (i.e., the costs related to producing the activity). After determining the GVA, we can apply Type 1 multipliers from the Office for National Statistics (ONS) to calculate 'indirect impacts' of an activity on the wider supply chain[32]. These indirect impacts come from the initial economic change caused by the project. Induced impacts can be calculated using Type 2 multipliers; however this will not be considered as part of this analysis.

To this end, it can be suggested that the direct economic impact of the FAN programme comprises three elements:

- **Grant funding** provided by the BFI that enable or facilitate the delivery of FAN programmes.
- **Other organisational expenditure** spent by grant recipients to deliver FAN programmes. This spending represents additional expenditure not covered within the 'grant funding' amount.
- **Attendee spending** associated with those attending or engaging with these programmes that is not captured within the 'other expenditure' amount.

Of these three inputs to the direct spending calculation, only one is known, that being the grant expenditure. This is because economic impact was not a feature of the original evaluation framework and therefore has not been considered in the monitoring and data collection of the programme. The BFI however wishes to estimate what the economic impact of the programme was. Such analysis is possible if estimating attendee spend using third-party data. However, it is not possible to estimate 'other expenditure' as there is no basis for the estimate. To this end, 'other expenditure' has been excluded from the overall economic impact analysis, which means that the true direct economic impact of the FAN programme will have been under-estimated here.

Attendee Spending

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31 HM Treasury (2022). The Green Book. 'Annex 3: Distributional Appraisal'.
32 Office of National Statistics (2022), United Kingdom Input-Output Analytical Tables, 2018.

To estimate attendee spend for the purposes of economic impact, we need three distinct figures:

- **Visits/Admissions:** The number of people spending money.
- **Spend:** Spending in the local economy. Includes spend as part of a visit, spend on accommodation for those staying overnight and other trip-related spending for those staying multiple nights. Excludes spending on tickets or other items that would be captured through organisation expenditure (i.e., to avoid double-counting).
- **Additionality:** The percentage of spending that would not have occurred otherwise. This is the calculation to remove deadweight.

To calculate the economic impact on the local area, only additional visitation has been included. From those visits, only expenditure that would not have otherwise occurred is considered. Visits/admissions can be derived from project reporting figures, where we are only interested in physical admissions. Place or origin was not recorded as part of the admission figure reporting, so it is not known what percentage of attendees were from outside the local area of the activity (i.e., tourists). To this end, because tourists were not being considered, we will assume each admission figure reported was equal to one trip. The resulting spend figure has then been estimated as 'average spend per trip'.

Two sources were used to provide average figures for the spend and additionality components:

- HOME 2019/20 Impact Assessment[33] (representing the average level of economic activity for attendees outside of London)
- Southbank Centre 2020 Economic & Social Impact Assessment[34] (representing the average level of economic activity for attendees of events hosted in London).

While relatively broad, these studies provided a calculated estimate of attendee spending and additionality. This impact estimate therefore assumes that these figures can be propagated throughout a larger programme of event activity so as to provide an estimate of economic impact. <u>The scale of this assumption means that any application of these figures outside of the context of this report should be done so with the utmost of caution.</u>

Economic Impact Summary

The following figure estimates the total direct spend of Film Audience Network (FAN) audiences (in London and outside London), highlighting the average spend per person, the additionality adjustment, and the in-scope physical admissions. The next figure then presents a summary of the estimated impact of FAN activities, accounting for audience spend and organisational spending (of which only grant funding is included).

Figure 40. Total Direct Spend of FAN Audiences

	LONDON	OUT OF LONDON	TOTAL
Average Attendee Spend *	£18.12	£12.38	£13.56
Additionality Adjustment *	64%	38%	45%
In Scope Admissions	396,557	1,530,674	1,927,231

[33] HOME (2020). 'HOME Impact Assessment 2019/20'. Ekosgen.
[34] Southbank Centre (2020). 'Economic and Social Impact Assessment of The Southbank Centre'. Hatch Regeneris.

Total Direct Spending	**£4,598,705**	**£7,257,463**	**£11,856,168**

** Note: BFI did not provide or collect figures for average attendee spend of additionality adjustment. These have been sourced from third-party data and applied here for the purpose of estimation only. Source: British Film Institute (In Scope Admission), Southbank Centre and HOME (Average Spend & Additionality for London and Out Of London respectively). Analysis by Culture Counts.*

Figure 41. Economic Impact Summary of BFI FAN National Lottery Funding

	DIRECT IMPACT	DIRECT GVA	TOTAL GVA
Audience Spending	£11,856,168	£6,355,381	£10,290,037
BFI Spending	£12,562,528	£6,736,068	£10,867,617
Grant Funding	£8,240,101	£4,418,369	£7,128,363
FAN Overheads	£4,322,427	£2,317,699	£3,739,254
Total	**£24,418,696**	**£13,091,449**	**£21,157,654**

Source: British Film Institute & Office of National Statistics (2022), United Kingdom Input-Output Analytical Tables, 2018. Analysis by Culture Counts. Audience Spend is scaled by a factor of 0.868 and 1.619 to calculate Direct and Total GVA respectively. This figure represents an average of the Type 1 Multipliers for Food & Beverage Service Activities, and Creative, Arts and Entertainment Activities. BFI Spending is scaled by a factor of 0.865 and 1.613 to calculate Direct and Total GVA respectively. This figure represents the Type 1 Multiplier for Creative, Arts and Entertainment Activities.

The first table represents the total direct spend of FAN audiences both in London and outside London. The average spend for attendees for London activities is assumed to be £18.12 as opposed to activities outside of London, with an average assumed spend of £12.38.

The estimated additionality adjustment for audience spending in London trips is estimated to be 64%, whereas additionality adjustments for outside of London attendances are estimated to be 38%. With an overall additionality of 45% the total direct impact of spending by audiences is calculated to be £11,856,168.

The economic impact summary accounts for audience spend and BFI spending. The direct impact of audience spending amounted to £11,856,168, which translates to a direct GVA of £6,355,381 and a total GVA of £10,290,037. BFI spending was equal to direct impact at £12,562,528, with associated direct GVA of £6,736,068 and a total GVA of £10,867,617. Combining audience spend and BFI spending, the total direct impact would amount to £24,418,696, with a direct GVA of £13,091,449 and a total GVA of £21,157,654.

3.2 Audience and Sector Impact

Themes emerging through interviews with Hub Managers and members reflected FAN's aims and priorities for BFI2022, as well as the broader impact of FAN at a local level. It has gathered momentum over the last decade and now directly align and supports the BFI's new Screen Culture 2033 strategy.

Film Audience Network FHLO teams continued to play a valued and unique role across the UK exhibition and cultural landscape in 2022, often becoming the 'glue' that has supported new partnerships and projects and existing members across the network.

In this final year of the programme, as the UK came out of Covid-19 pandemic, restrictions were fully lifted, and the cost-of-living crisis began, the FHLOs provided vital support to member organisations across the UK as they sought against this backdrop to attract audiences back into their venues and events.

The last 12 months have also seen major political upheaval, structural changes across Westminster, national and local governments. The funding landscape for arts and culture is also in flux, with new post-Brexit funding regimes such as the UK Shared Prosperity Fund replacing European structural funding.

Within this context, the Hubs played an important role in delivering the levelling-up agenda, community cohesion, and place-making, helping to facilitate connections between otherwise disparate local stakeholder groups.

The following themes of *Communities, Collaboration, Equality Diversity & Inclusion, Environmental Sustainability and Place-Making w*ere identified through a grounded-theory approach to the qualitative information provided by Hub managers and member organisations. This approach enabled complex and interwoven themes to emerge, in addition to assessing quantitative data directly against the BFI 2022 FAN outcome framework.

Communities

The Hub structure was vital in supporting and empowering organisations and groups to develop projects and events embedded within local communities. This activity supported FAN's aim of creating a larger, more diverse, and confident audience, with a focus on the collective viewing experience.

Hub managers and members reported that small amounts of seed funding often went a long way in helping to kick-start community projects or events, with FAN Lottery funding often the only source of initial support. "Pitch pots" in particular (sometimes known by other names, depending on the Hub) were seen by members as an "entry-level" and "straightforward" route to receiving small pots of funding to tackle specific needs.

> *Without the pitch pot I wouldn't have been able to do it […] Some of the things that are vital to make it a meaningful cultural experience [...] to make sure you have a wider canvas and bring things to people that they wouldn't normally engage with […] you wouldn't be able to do [without the FAN funding]."*
>
> Member, Midlands

This investment supported the delivery of the BFI2022 priority for FAN to increase access to a wide range of independent British and international film.

Beyond the financial investment in projects, the professional support role of Hub managers engendered a sense of confidence across the community groups setting up these projects, often for the first time. Through this work, FAN continued to build trust and develop networks across diverse communities and in areas otherwise not engaged with cultural exhibition. However, Hub managers' reported that not all community groups and networks aligned well with FAN, with a small number reflecting a sense of disconnect, resulting in the underreporting of data. Some member organisations interviewed would like to have seen more networking events for community groups who felt less confident about attending the member networking meetings.

Case Study: The Evolution of Community Cinema

The impact of FAN on UK film exhibition was demonstrated in the diversification of community cinema programmes, from solely screening mainstream classics to varied programmes of independent British and international film, supporting FAN's priority to 'enhance the quality and reach of audience-facing activity, deepen knowledge and build capability in its membership'.

Through supporting community cinema initiatives, FAN enabled a more diverse audience engagement with independent film exhibition, providing enhanced opportunities to enjoy in-depth cultural experiences. For example, Arab-heritage residents and new to Arab-language film audiences from the Ormeau Road District of South Belfast were given the chance to experience Arabstan, an Arab film festival hosted by a Lebanese-born member of Ormeau Community Cinema. Funding support and encouragement from FHNI empowered this urban community cinema to take a financial risk which would not have been possible without FAN support.

> *Part of the purpose of the community cinema was as much about community cohesion, as it is about screening films, because we are in […] in a very diverse part of Belfast we just thought good community cinemas are for people having shared experiences and coming together [….] as a community".*

Ormeau Community Cinema, N Ireland

The realisation of the FAN BFI2022 aims to develop audiences with a primary focus on the collective viewing experience was demonstrated through the community initiative ***Your Kirky*,** spearheaded by Kirkintilloch Community Council in partnership with the residents of Kirkintilloch, East Dunbartonshire. Following consultation in 2018, many residents of all ages wanted to see community cinema return to Kirkintilloch. Pre-Covid *Your Kirky* ran several successful events in partnership with Regional Screen Scotland and IndyCinema to start building a cinema programme in the town. *Your Kirky* was also able to purchase cinema equipment and is actively engaging partner organisations to support audience development. More recently, funding from Film Hub Scotland enabled *Your Kirky* to deliver more bespoke screenings in the community, focusing on community screenings for those who found it harder to access mainstream cinema to develop more cultural screenings for the wider community.

A core priority for FAN BFI 2022 was to 'enhance the quality and reach of audience-facing activity, deepen knowledge and build capability in its membership'. An example of how community cinema created original approaches to support this aim was **Creative Arts East (CAE) Screen**, a community cinema network made up of volunteer promoting groups in rural Norfolk, Suffolk and Cambridgeshire. A tiered membership model was created by CAE through Film Hub South-East support, enabling venues to become CAE Screen promoters, with CAE Screen providing portable cinema equipment, technical training, programming advice and special film licence discounts. Whilst CAE felt supported and valued by Film Hub South-East, as the organisation is not a venue, there was a sense that its unique structure did not align well with FAN funding structures, schedules and prescribed themes, leading to a sense of disconnect and lack of confidence in FAN support overall

Collaboration

In addition to the two core aims of FAN[35], the political, economic and social instability of the last few years led to the network playing an increasingly important role in fostering collaboration at a local level, now vital across the cultural sector. The FHLOs often led these local collaborations, bringing together the FAN membership and local stakeholder groups, such as local authorities and funders, resulting in solid and trusted partnerships developed through FAN Hub leadership. In the final year of FAN, this collaborative approach helped to create broader opportunities, spin-off projects, shared resources, and new funding opportunities.

Case Study: Catalysing Partnerships

Interviews with FHLOs and member organisations highlighted this 'collaborative leadership' approach, illustrating the catalytic role Hubs played in developing partnership-led initiatives. In Wales, seven rural venues across the North shared feelings of isolation with the Film Hub Wales

[35] *to develop a larger, more diverse, confident and sustainable audience for a wider range of independent British and international film - with a primary focus on the collective viewing experience to create a stronger, more connected and confident sector for the distribution and exhibition of independent British and international film.*

team, which resulted in **Off Y Grid (OYG)**, a shared idea to build a connected community of venues and audiences, to create 'big ideas in small places.'

> *It's a big area [...]: unless you're on that doorstep [of FAN venue] or, if they're not screening what you want to see you've probably got an hour driving all directions".*
>
> Film Hub Wales

Each venue was different in terms of its size and demographic, but Welsh culture, heritage, and access were at the core of OYG's objectives. A diverse programme of films was offered across the network to engage audiences, taking them on a 'cinematic journey' on screen, as they were encouraged to visit each venue. With central coordination, venues collaborated to brand and promote films at each cinema through shared social media, booking incentives, trailers, coordinated film tours and Q&A sessions with talent – all of which provided enhanced cinema experiences. They also worked to negotiate rates, explore community outreach and support young filmmakers. This approach supported FAN's outcome that 'members are more knowledgeable and effective in their work, including their ability to respond to BFI2022 priorities'. By its fifth year, OYG had established a crucial hyper-local network, which improved access to independent film in the region. The Hubs also brought together regional partners, local authorities, funders and creative practitioners to ensure the cultural exhibition sector remained relevant within this new and fast-evolving regional landscape. This activity supported FAN's core aim 'to create a stronger, more connected and confident sector for the distribution and exhibition of independent British and international film'.

In 2021, with an award from the FAN Film Exhibition Fund and match funding, the **Trowbridge Town Hall** team expanded its cinema offer from one-off community events to a more regular film programme. With new investment from the Government's Future High Street Fund, £8.1 million has been invested by Wiltshire Council into Trowbridge's historic Town Hall, working towards an even richer mixed arts programme of activities in the future. Building on FAN-supported activity, the Town Hall team is exploring the possibility of continuing its film offer in alternative pop-up spaces during the capital development and investing in developing the cinema offer as part of this exciting new chapter for the building.

Similarly, Film Hub South-West identified **Create Studios** in Swindon as a leading film and media company focusing on young people and inclusion. As part of BFI's consultation about the Town's Fund and discussions with other arm's-length bodies, the Hub kept in touch with Create Studios about its bid and advocated for including a film exhibition space. Create Studios managed to secure £900K Towns Fund and ACE Capital funding for a new Digital Cultural Hub in the regeneration heart of Swindon and will have its first dedicated home in time for its 40th-anniversary celebrations in 2024. The BFI invited Film Hub South-West and other Hub managers to be part of the Town's Fund selection process, joining arms-length bodies such as Arts Council, Heritage Lottery and others, helping to build solid alliances with funders at a regional level.

Interviews with Hub managers and member organisations revealed that Covid-19 lockdowns created the sense across FAN that the exhibition sector was more fragmented, with venues closing for extended periods and networking events cancelled. The Hubs responded with initiatives to 'create a stronger, more connected and confident sector'[36]

> *During the pandemic we almost got quite a lot closer to the members being responsive in the way that we were supporting them [….] those relationships are really valuable, I think, for us, and for them, for the members".*

Film Hub Manager

> For example, each quarter, **Film Hub London** invited cinemas, festivals, art centres, local authority Film Officers, film clubs and freelancers to an informal breakfast event to share sector news, opportunities, best practice and lessons learnt. Alongside the chance to talk to each other, the Exhibitor Breakfasts offered presentations on critical issues affecting the sector, with guests including Into Film, We Are Parable, Goss Consultancy, Lewisham London Borough of Culture 2022, Tim Robey of The Telegraph, Fringe! Queer Film and Arts Fest, Film and TV Charity and London's Screen Archives. Hosted across London, at different venues of interest to the sector, these forums created a space where the members forged new partnerships, showcased venues and developed mentoring relationships. The Breakfasts were an opportunity for Film Hub London to host training and development sessions for members to support BFI FAN objectives such as creating 'A more diverse audience engaging with FAN activity'.

Equity, Diversity and Inclusion (EDI)

Whilst all publicly funded cultural organisations have general obligations set out in the Equality Act 2010 to comply with equality duty, the Hubs supported bespoke EDI initiatives based on local knowledge of member organisations and the communities they serve. Hub managers highlighted relationships built over years of activity, resulting in a more diverse audience engaging with FAN activity, a critical outcome for BFI2022 FAN. Despite this, some member organisations reported barriers to developing EDI-led initiatives, such as onerous data collection and bureaucratic funding applications. Efforts were made across the Hubs to support member organisations as far as possible with these issues, though some were outside of Hub control, such as the data and grant application process.

> *I think that how we change the workforce has been quite important as that not only helps getting new [underrepresented] people into the sector but also the organisations who have hosted them. It's going to change their understanding of programming […] change their working practices […] going all the way through to audiences as well. I think that kind of training and how we develop people is a really important part of the Hubs."*

Film Hub Manager

[36] *BFI2022 FAN core aim*

Case Study: Diverse-led Initiatives

FAN's objective to increase the diversity of audiences outside of London, and to create a stronger, more connected and confident sector, can be illustrated through examples of diverse-led initiatives responding to local audience demand and gaps in current provision. For instance, under the leadership of creative director Hi Ching, **Thurrock Film Festival** had diversity at the heart of its output with 'unified diversity' as its strapline, aiming to create imaginative screenings, discussions and events. Hi Ching moved to Thurrock from London and was surprised by the lack of both the provision and the diversity of cultural events. Supported by Film Hub South-East , under Hi's leadership, the 2022 programme was curated around themes inspired by the 75th anniversary of the Independence of India and Pakistan, the 50 years since Uganda expelled the South Asians, including Sikhs, and 25 years after the Handover of Hong Kong.

> *We are diversity-led team [...] I've had so many years of having these panel discussions about diversity in media in TV, in film that I kind of feel I'm kind of well-positioned to be an advisor in some ways [...] on how to pull people [audiences] in".*
>
> Hi Ching, Thurrock Film Festival, South East

Hubs also played an essential role in supporting diverse-led community initiatives to support the outcome of growing 'FAN audiences along with enhanced opportunities for them to enjoy an in-depth cultural experience'. With funding from Film Hub Wales, **Gentle/Radical Film Club** was a 're-gathering' project working with hyper-local audiences in Riverside, Cardiff, generating engagement street by street. The project explored how contemporary cultural work connected to issues such as social justice and systemic and social change through film screenings and events. They marketed events via their unique form of local outreach, which included door knocking, flyering single individual streets and organising local gatherings – all of which prioritised care for individuals in the community.

FAN aimed to increase access to a *wide range* of independent British and international films for audiences, with Hubs and member organisations playing an important role in mapping gaps in current provisions. Having identified that local South Asian audiences were underserved, **ARC Stockton**, secured Film Hub North funding to pay for a consultant programmer to build an enhanced South Asian film offer and provide a marketing budget to engage South Asian communities and other avenues of cultural work for ARC.

> *The challenge was being able to try and build relationships with people from that community that really understood what ARC is about, and what we're trying to do with the programme [...}, and then start to build our knowledge of where the right places are [within that community] to take posters and flyers and have conversations".*

ARC, Stockton-on-Tees

FAN support fostered a great sense of capability, confidence and capacity across the ARC team, resulting in increased distribution contacts and a far greater understanding of how to engage this previously underrepresented local audience, for example, by programming more niche films and enhancing the experience by adding Q&A and other activities that attracted new members of the community.

Environmental Sustainability

The BFI's sustainability targets have evolved over the past decade of FAN, with ambitious plans for the UK's screen sector placing sustainability as one of three cross-cutting principles (along with EDI and UK-wide) at the forefront of its Screen Culture 2033 strategy.

Whilst Hub managers and member organisations interviewed roundly welcomed the focus on sustainability, they reported a growing concern that the film exhibition sector needs more coordinated strategic leadership to rise to the challenges set by the BFI. Although some Arts Council England-funded Hub members and FLHOs were able to access free sustainability tools available from Julie's Bicycle, the exhibition sector does not have the same strategic oversight as the production sector, which BAFTA's Albert supports.

The lack of capital funding for heritage exhibition venues and the absence of UK-wide bespoke film exhibition training programmes were two critical factors cited during interviews with Hub managers as impacting environmental sustainability across FAN. However, FAN continued in 2022 to pioneer innovative and creative approaches to sustainability across projects and venues.

In moving forward, there is a clear strategic opportunity for BFI via FAN to lead the development of UK-wide targets, principles and delivery mechanisms for sustainability in the exhibition sector.

"[The exhibition sector does not] have capital development funding […] I really think [BFI] could do with building more alliances with Arts Council and other funders to say, we really want to work with you to improve cinemas in terms of […] sustainability. Because we're scratching the surface, we [FAN] can influence what they [members] put on screen. We can have discussions, we can facilitate like access to resources and so on, but we can't really make a big intervention in their buildings structure".

Film Hub Manager

Case Study: Sustainability Toolkits

FAN's objective for members to become 'more knowledgeable and effective in their work' was demonstrated through the example of Screen Hub South-West member Watershed's pioneering new approach to sustainable film exhibition. Watershed has committed to minimising the negative environmental impact of its work and has collaborated with the broader exhibition sector, particularly FAN members, to contribute to this aim.

Achieving this aim takes sustained internal work, such as the activity of its Environmental Emergencies Action Researcher, Zoe Rasbash (funded through Bristol+ Bath Creative R+D initiative[37]). The research undertaken by Zoe focused on existing buildings representing a large portion of the cinema exhibition infrastructure, forming the basis of a panel discussion at This Way Up[38] exploring the idea that *The Greenest Building is One that Already Exists.* Zoe also went on to be commissioned to create the FAN-funded *A Simple Guide to Making Your Cinema Greener*[39] an easy-to-use toolkit for exhibitors across the UK, with ideas for exhibition venues on prioritising impacts, waste management and digital emissions. Contained in the toolkit was a link to the ICO's *Green Cinema Toolkit,* providing a more detailed guide for exhibitors.[40]

The provision by FAN of these practical and easy-to-implement guides enabled venues across the UK to implement sustainable-first practices. **The Magic Lantern** cinema in Tywyn, a town on the west coast of North Wales, is a case in point. The venue plays a unique role in the history of UK cinema, screening films in its assembly rooms eight years earlier, as far as is known, than any other venue still operating as a cinema today in Britain. Despite being a heritage venue, through Film Hub Wales's support, it places environmental sustainability as a priority. The cinema is now a "No Plastic" venue with glass jars for sweets and 'postmix' drinks systems with returnable tanks rather than individual bottles. Other measures introduced to support environmentally sustainable exhibition were reusing plastic items, using local suppliers and digitally distributed films.

The Magic Lantern's partnership with Greener Tywyn[41] and the town's proximity to the Centre for Alternative Technology in Powys meant there was an increased awareness across local audiences of the impacts of climate change and the importance of climate justice. In response, and through FAN support, The Magic Lantern developed programmes and activities such as screening films related to the outdoor environment, with Q&As and a climate change networking meeting with 148 attendees.

Placemaking

Hubs continued to play an essential role in supporting screen culture as an important component of local placemaking during continued cuts to arts and culture funding. Local Authority investment

[37] *https://www.bristolbathcreative.org/*
[38] *The annual conference for UK exhibition https://thiswayupcon.com/*
[39] *https://www.the-bigger-picture.com/wp-content/uploads/2022/03/A-Simple-Guide-To-Making-Your-Cinemas-Greener.pdf*
[40] *https://www.independentcinemaoffice.org.uk/advice-support/green-cinema-toolkit/*
[41] *https://www.facebook.com/groups/greenertywyn/about?locale=en_GB*

in culture through capital and revenue expenditure in England fell by more than 30% in real terms between 2010-2020 in response to an overall decline in local government budgets over this period[42]. According to data analysed by Campaign for the Arts, government funding of Arts Councils in the devolved nations was 21% lower in Wales, 63% lower in N. Ireland, and 4% higher in Scotland, though this followed nine years of lower investment[43].

The collaborative leadership approach taken by FAN, as well as the deep local knowledge of communities, produced a diverse range of initiatives which established 'place' at the heart of the project. Screen heritage projects had a particularly impactful role in delivering audience engagement with the history of local towns and cities, with many Hubs adopting innovative approaches and partnerships.

> *The BFI really always prefer us to work with the screen agency [Northern Ireland Screen] in terms of archive and heritage[...]this has really produced a lot of work over the last two or three years to get their collections in a place where they could really open them up. And they're very interested in events […] engaging audiences as much as a possible, so we're often coming in as match funders".*
>
> Film Hub N. Ireland

Case Study: Film Festivals

Several recent studies evidenced the role festivals play in contributing to placemaking and the well-being of local communities, most notably research in *Finding common ground: The conception of community arts festivals as spaces for placemaking* [44]evidenced festivals as providing opportunities for the use of community spaces, creating a sense of community and provide opportunities to reimagine public spaces.

Working with The Audience Agency, Film Hub Midlands commissioned a mapping exercise to track 'hot and cold' places for film festivals in the Midlands, looking at factors such as screen provision, population and access. The findings from this research identified Shropshire as underserved for film festivals; however, the analysis indicated an active place-based partnership of cultural and heritage stakeholders and an engaged local authority with available match funding. Film Hub Midlands took on a project management role, working with arts organisations across Telford & Wrekin and the local council to develop a place-based festival strategy resulting in the concept behind **Telford Film Festival**.

The Hub provided industry expertise in film curation and marketing and supported new exhibitors to put on and manage film events as part of the wider festival. Working closely with the local authority's marketing team Film Hub Midlands produced a communications plan, print and social media strategy. Many of the partners involved in the Telford Film Festival went on to

[42] *https://pec.ac.uk/blog/a-new-deal-for-arts-funding-in-england*
[43] *https://www.campaignforthearts.org/about/purpose/thriving-everywhere/*
[44] Health and Place Vol 61 – Tristi Brownett and Owen Evans. Jan 2020

host regular film events in local venues, not just as part of the festival (which continued to be run by Telford and Wrekin Council as part of its Festival of the Imagination) but also year-round.

Film festivals also enabled FAN to prioritise increasing the diversity of audiences and boosting the number of 16-30-year-olds, a key objective of BFI 2022. For example, through Film Hub Midlands support, organisers of the **Northampton Film Festival** harnessed the role that young people played in injecting a sense of cultural identity in Northampton with a strategic focus on the inclusion of young people in the development of the festival programme and activities through a Young Person Committee and engaging Youth Volunteers. Outreach to engage young and diverse people from across the area was delivered through free networking events, live streams with filmmakers and FAN-supported roadshows.

> *We are recruiting young people to set up film boards in their area. So young people […] will curate their own stuff which will happen either at the same time as film festival or at their own time of year. […] it's about making but it's still about opening doors to careers.*
>
> Northampton Film Festival, Midlands

4 TOWARDS SCREEN CULTURE 2023

Screen Culture 2033 is the BFI's 10-year strategy setting out how **from April 2023**, it will advance knowledge, collections, programmes, National Lottery funding and leadership to build a diverse UK screen culture that benefits all of society.

There are three cross-cutting principles of Screen Culture 2033:

- **Equity, diversity and inclusion**, so everyone can develop a meaningful relationship with screen culture, regardless of their background or circumstances.
- **UK-wide**, so that everyone across the four nations of the UK should be able to experience and create the widest range of moving image storytelling.
- **Environmental sustainability**, from reducing the BFI's own carbon emissions to supporting wider industry efforts to get to net zero.

As BFI starts delivering its ambitious plans for the screen sector over the next decade, the foundations built through BFI2022 FAN activity across the UK position it as an important lever for delivering Screen Culture 2033. The case studies and data highlighted through evaluating BFI2022 FAN activity demonstrate its impact and value to the UK screen sector.

Looking ahead to the delivery of Screen Culture 2033, along with the three cross-cutting principles the new strategy has honed **four critical objectives** designed to drive change and deliver benefits for all of society and the screen sector UK-wide. These are:

- **Experiencing screen culture** – so everyone can experience a great range of screen culture.
- **Creativity and storytelling** – so anyone from first-time creators to world-class professionals can create screen stories.
- **A skilled and representative workforce** - a UK screen sector workforce that is skilled and reflects the population.
- **Success in a changing landscape** - independents and cultural organisations are supported to achieve success in a changing economic and cultural landscape.

This report has demonstrated that FAN is already closely aligned with the principles and objectives of Screen Culture 2033, with the following recommendations for further alignment.

FAN's UK-wide network provides an established framework for aligning other BFI activities. An example of how this alignment could add greater value to Screen Culture 2033 delivery is through the BFI's new Skills Cluster initiative. FAN (which will now be delivered jointly with BFI NETWORK and BFI Film Academy) is a named delivery partner across the six UK clusters selected by BFI to provide training programmes to support diverse and underrepresented communities into employment in the screen sector. As a key objective of both initiatives is to develop talent pipelines across the UK, this report recommends that BFI FAN works with the skills clusters to identify where data collection and talent outreach activity could be aligned to avoid duplication and to amplify impact.

The success of FAN's approach to EDI developed over the last decade, described earlier in this report, is based on a mix of hyperlocal activity alongside long-term engagement with EDI-led member organisations. This model provides a proven template for new initiatives emerging from Screen Culture 2033. This report recommends that FAN Hub managers and EDI-led member organisations are engaged in developing Screen Culture 2033 programmes to apply this learning to new initiatives.

FAN's distributed model of localised provision based on identified needs has enabled the provision of support and expertise for member organisations across the UK to which they would not otherwise have access. Hubs also act as ambassadors and outreach leaders for the BFI across the UK. FAN's unique UK-wide model provides a template for future Screen 2033 programmes which may seek to provide access and support for otherwise under-served organisations or venues.

The innovative pilots emerging from the Hubs described above in Section 3.2 to address environmental sustainability provide the BFI with solid foundations for delivering Screen Culture 2033's cross-cutting theme of Sustainability. The BFI is now well-placed to establish a clear leadership position in relation to sustainability for the UK exhibition sector over the next decade.

FAN's approach to collaborative leadership (explored in Section 3.2) at a local level engaging local authorities, stakeholders, and regional/national funders to address the challenges and opportunities changing the economic and cultural landscape provides a template for future regional BFI initiatives across the devolved nations and regions.

> “*We have a powerful network of exhibitors across the UK that can be supported regionally in a way that makes sense for them, but that can come together to support releases, distribution models, audience development initiatives, training and share best practice. But if that conversation could include bigger players so that it was amplified and louder, it feels like it could be globally significant.”*

Film Hub Manager

5 APPENDIX 1: PROCESS EVALUATION RECOMMENDATIONS

There are several recommendations we would propose to improve the effective evaluation of the FAN programme.

Evaluation framework, outcomes indicators and targets

As discussed above the programme would benefit from a clearer alignment of the desired outcomes with indicators and targets set at the start of the project. Any survey and data collection plan should then be designed to snugly fit this framework. This will ensure that all data collected is clearly mapped to an outcome, and nothing is missed.

Organisations cited the need to collect data across multiple BFI projects, so a clearer alignment of metrics across all BFI programmes is something that should be worked towards, so that data can be collected and reported once, and outcome measures can be better aligned across strategic areas. Using a platform such as Culture Counts would aid in aligning data from all BFI programmes into a single dataset, with the ability to cut data by projects, outcomes or funding strands. It would also facilitate the linking of project information, provided by Hubs and organisations, with audience and outcome data.

Where targets are set, the local/regional context should be considered, both in terms of demographics, and physical infrastructure. For example, a single ethnic diversity target does not take account of huge variances in different areas of the country and if the aim is to be representative of the population, then the reference point should be the local demographics, rather than a single overarching target. Similarly transport infrastructure variances can result In higher costs to audiences to attend, or problems with evening travel - both of which have an impact on audiences.

Consideration should be given to how engagements other than physical admissions are recorded. Outcome metrics should be flexible enough to allow for separate reporting of 'live online' experiences as well as 'indirect' engagements that do not fall into the category of an admission or live online viewing.

Recommendations:

- Develop an evaluation framework that:
    - clearly outlines indicators and targets, and maps all data back to this framework. Coding (see below) should also align with this;
    - has clear definitions for all metrics captured, to ensure consistency of approach for a distributed evaluation;
    - shows the relationship between BFI programmes, and how indicators and targets are harmonised or aligned across these;
    - works towards data being captured once but fulfilling multiple purposes.
- When setting targets, refine these more locally to take account of the demographics and infrastructure of each area, to allow for contextualisation of local data, as well as a national picture.
- Consider moving towards a single evaluation platform, such as Culture Counts, to manage the complexity of evaluation across the BFI.

Survey Sampling, Design and distribution

The **burden of reporting** was felt heavily by many organisations and there was a world-weariness about the Hubs' voices being unheard in terms of contributing to improving this. They sometimes felt resigned to having to do something they didn't feel worked well for them. However, they do acknowledge the need for centralised reporting.

Sampling quantities were not determined directly by the requirements of the evaluation framework, and the granularity of data analysis required for each outcome.

> *The whole audience monitoring thing is a form of madness. They've set up these targets and they need to somehow monitor it but the way that they are doing it on every single audience member is…detrimental to the experience of those audience members. They don't enjoy it, it's very long, it's very intrusive and we're getting lower and lower numbers of engagement. It's unsustainable…The data you are basing your evaluation on does not reflect the work that we do."*

Member Respondent

> *It's disappointing sometimes when you have supported an organisation that is specifically talking to a certain audience and then they either don't complete the surveys, or they get very few. There may be additional factors in as far as some audiences not being comfortable with giving their information and being suspicious of information."*

Member Respondent

> *It's really hard to get audiences to do the digital copies but they are happy to do the paper […] That's the only way that we can get some of the Italian and the Kurdish community to answer those questions so that I think that needs to be understood a little bit. […] Better understanding of how we can do more to capture data and information."*

Member Respondent

However, some members have found a way to make the surveys useful and provide insight for decisions:

> *We're always looking at ways and how we can best serve our audiences and really try and understand them a little bit more. Film London really gave us the tools to be able to do that. So with the post event forms, we've got so much information, so much great insight on our audience based off those forms. And we still use a*

lot of that data insight to govern some of the decisions we make today."

Member Respondent

Recommendations:

- Develop a clear sampling plan designed to deliver metrics directly related to the evaluation framework, clearly identifying which outcomes require more granular data analysis and therefore higher sampling numbers, and which can rely on aggregated data (meaning smaller samples are adequate);
- Work with the FHLOs to create best practice guidelines, further developing existing guidance on sampling, so that the burden of surveying can be reduced if possible;
- Resource alternative forms of surveying throughout the year, such as face-to-face data collection on tablets;
- Look for other points in the customer journey from which to gather key information in shorter formats;
- Record response rates as % of admissions by project to help understand non-response bias and assess validity of data collected; this will help set the required sample sizes in future iterations.

Hub reporting, data coding and validation

There are several coding inconsistencies being made at the point of data entry by the Hubs, which require substantial manual correction post hoc, and make aggregate reporting of limited use if they are not corrected.

In addition, a lack of clarity about the role of each type of coding (e.g. budget, focus areas, etc.) makes the job of spotting inaccuracies or anomalies very difficult. The clearer evaluation framework, and alignment of all metrics and coding systems, along with agreed definitions of terms, suggested above will help with this, but it is also important for data to be checked and validated for accuracy as is entered.

Our understanding is that Hubs can change data once submitted, which means that any validation could need to be repeated several times.

Recommendations:

- Agree coding categories, definitions and principles up front (i.e. can a project have more than one code in each type?);
- define a 'cut off' for supply of coded data, so that data, once validated, cannot be changed;
- consider different software / methods for capturing reporting data, which restricts types of data input into the relevant fields and flags inconsistencies or errors at point of entry.

6 APPENDIX 2: DISCUSSION GUIDES

FAN Year 5 Evaluation

Discussion guide for interviews with Hub managers (90 mins)

Research objectives

- To understand where FAN has worked well for members and/or audiences and achieved its aims and outcomes.
- To identify areas for improvement or development of FAN to achieve its aims.
- Understand differences between regions and any drivers for these.
- To uncover best practice case studies to illustrate success.
- To uncover any hidden outcomes that are not currently mapped within the aims.
- To fill in gaps to complete the Evaluation Framework – where quantitative data isn't giving us the answers.

Intro

We are undertaking an evaluation of Y5 of the FAN on behalf of the ICO and BFI
Any general themes and insights will be anonymised when we report and any verbatim comments that cannot and need not be identified will remain anonymous.
If we would like to attribute a direct quote to you or to use anything in a case study, we will share this with you before your name is put to it.
We would like to record it for the purposes of our own analysis and to ease transcription so are you ok with this? Any recordings would not be shared with anyone else unless with your express permission.

Outline description of region

- How would you describe your region's film exhibition sector?
- What kind of projects have you been focusing on the last year?
- And why those?

Summary of opinions on FAN

Overall, in the last 12 months, what has your experience as a Hub manager of FAN been? (Funding to and via you, structure, processes, ability to achieve outcomes)

- What about FAN works consistently well across the regional Hubs/your Hub?
- What's been the biggest challenge? How did you address this within FAN or with the BFI?
- What would you change about the structures, processes or aims of FAN? What would you like to do differently in the future?

What's worked for MEMBERS

- What about the FAN structure or support has worked in terms of your members? How do you know this has worked well? (Process as well as outputs and outcomes; have you increased/decreased membership?)
- Are there specific examples where you feel members have become more knowledgeable and effective [because of development activities you have delivered]?
- Are there any examples of talent development or recruitment which FAN has helped with?
- What have been the barriers and challenges for your members in achieving their own aims?

CLARIFY: Which of these challenges have been something specific to your local region/ member(s) and which are seen more widely across the FAN network?

What's worked for AUDIENCES

- It's been a really tough few years for audiences - in the last 12 months how have you and the FAN network supported getting audiences back to pre-covid levels?
- What's worked in the FAN programme in terms of audience development? (diversity, 16-30s, increasing audiences, screen heritage, outside London)
- Are there examples where it's worked really well?
- What have been the barriers and challenges?

CLARIFY: Which of these challenges have been about your local region and members and which are seen more widely across the FAN network?

- What do you think of FAN's aims? Is anything missing or should anything be taken out? (audience development - EDI, screen heritage, young audiences; member development including talent development)

Looking at the data for your area, these things stand out:
A, B, C, etc.

- Does that feel right to you? What do you feel might be driving that?
- Note: Compared to the FAN guidelines, are outcomes emerging in this conversation which are not captured in the guidelines? If so, reflect and clarify with the Hub

(If not already covered above)

- We are particularly interested in findings around equity, diversity and inclusion (in terms of audience development and talent development) and environmental sustainability
- Do you think FAN funding and support has had an impact in these areas in your region?
- Can you share any examples?
- What could the FAN network do better with regards to EDI and Sustainability?

Anything else you would like to say to feed into our evaluation?
Thank you for your time.

FAN Year 5 Evaluation

Discussion guide for interviews with **Members (60 mins)**

Research objectives

- To develop examples of best practice of FAN-funded programmes
- To understand in what areas FAN is driving change (e.g., audience diversity, sustainability)
- To understand any common barriers for members in engaging with FAN or achieving project aims
- To identify areas for improvement or development of FAN
- To uncover any hidden outcomes that are not currently mapped within FAN aims

Intro

- We are undertaking an evaluation of Y5 of the FAN on behalf of the ICO and BFI
- Any general themes and insights will be anonymised when we report and any verbatim comments that cannot and need not be identified will remain anonymous
- If we would like to attribute a direct quote to you or to use anything in a case study, we will share this with you before your name is put to it.
- We would like to record it for the purposes of our own analysis and to ease transcription so are you ok with this? Any recordings would not be shared with anyone else unless with your express permission.

Introductions

- Outline of the project we are doing and why
- Your name and role
- Data collection, privacy, confidentiality and approvals
- How long have you been a member?

Description of organisation and any FAN projects

- Tell me about your organisation
- What projects did you undertake (funded by FAN or working with Hubs)?
- Who were the audiences you were trying to reach?
- What other objectives did you have? (EDI? Sustainability?)
- Were there particular focus areas you were looking at? (diversity of audiences, young audiences, talent development, environmental sustainability, screen heritage, increasing in-depth experience)

Project outcomes

- How far did you achieve what you set out to do? Did you reach the audiences you wanted to? Did you achieve anything else that you didn't plan for or didn't expect?
- If yes, what was the biggest factor in that?
- If no, what got in the way?
- What was the best thing about the project - for you/ for audiences?
- What were the challenges?

- It's been a really tough few years for audiences - in the last 12 months how has FAN supported you in getting audiences back to pre-covid levels? Have you needed to/ been able to access any additional covid recovery support for audiences?

Your growth as a member

- How did the Hub and the FAN funding help you as an organisation?
- Did your funding and support increase your capacity as an organisation? In what way? How did it grow your skills and knowledge?
- Did it help you recruit more easily or develop new talent?
- What would you have liked to have done differently/been different?
- CLARIFY: Which of the challenges (processes) have been about your specific project and which are about how FAN works?

Opinions of FAN

- What do you think is good about FAN?
- What would you change about FAN? What should it do differently?
- How confident are you that you understand FAN aims? What is FAN for?
- What do you think of FAN's aims (in guidelines)? Is anything missing or should anything be taken out?

Anything else you would like to say to feed into our evaluation? Thank you for your time.