

BFI Film Audience Network New Release Strategy

Evaluation Executive Summary

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Contents

Introduction 3

The film titles..... 3

The findings – Sectoral research..... 6

The findings – Audience research..... 7

Conclusions..... 8

Recommendations 9

Introduction

The BFI Film Audience Network (FAN) New Release Strategy (NRS) aims to inspire and incentivise cinemas to take risks on 'challenging' film titles and therefore grow the audience for a broader range of films, which in turn it is hoped will impact on wider sectoral confidence about the audience possibilities for these titles. The pilot programme ran from March 2016 to March 2017 and consisted of the selection and promotion of five titles to exhibitors along with tailored marketing support. The five titles in the pilot scheme were *The Pearl Button*, *Mustang*, *Chevalier*, *Sonita* and *The Fits*.

The initiative is co-ordinated by Film Hub South West & West Midlands (SWWM) on behalf of the nine hubs of the Film Audience Network. Tailored marketing support consists of a centrally produced set of marketing resources, which are developed in collaboration the film's distributor and designed to complement their own campaign, alongside a regional budget which the each of the hubs uses to support exhibitors in their own area. A total of £86,000 has been invested in the NRS over the pilot period.

Evaluation of the scheme consisted of audience research undertaken by The Audience Agency and sectoral research undertaken by Sarah Boiling Associates. The following data has formed the basis of this report:

- Exhibitor survey data from the five titles
- Semi- structured telephone/face to face interviews with cinema staff, distributors, strategic partners and the NRS core team
- Group discussions from the NRS Strategy Day
- Email questionnaire from three Film Societies
- Audience report by The Audience Agency
- Distributor booking data for each NRS title

The objectives of the evaluation were to identify the audience reach of the selected titles and to understand the impacts of the scheme on Film Hubs and the wider exhibition sector.

The film titles

Titles are selected by the BFI Film Audience Network Programming Group, comprised of Programmers from the nine Film Hub Lead Organisations (FHLOs), the BFI and BFI FAN's Strategic Partners - the Independent Cinema Office, Into Film and Cinema For All. There are six criteria to inform NRS support and a film is expected to meet at least three of these to qualify.

- Go beyond the mainstream offer and may be perceived as 'challenging'
- Have the potential to engage diverse and/or young audiences*
- Show a diversity of on-screen portrayals*, cultures and languages.
- Tell distinctive British stories - with a focus on non-London*
- Make a particular contribution to the art of film (for example a distinctive style)
- BFI FAN can impact on in terms of audience reach and engagement

*Aligning with BFI strategic aims around diversity

207 individual exhibitors across the nine FAN Hubs booked an NRS title and there was a combined total of 442 exhibitor bookings across the five titles.

The Pearl Button

- Distributor: New Wave
- Release date: 18 March 2016
- Box Office: £62,200
- Admission: 7,900

NRS support made a significant difference to the marketing of this title. Previews and Q&As with director Patricio Guzmán were a key aspect of the campaign. A range of regional support was offered via Film Hubs including preview screenings, support for special events; social media; freelance marketing support; regional press and advertising; support for flyer, poster and banner design & print.

Mustang

- Distributor: Curzon Artificial Eye
- Release date: 13 May 2016
- Box Office: £326,479
- Admissions: 54,413

The NRS campaign focused on young people aged 19-25, and the UK Turkish community. Key aspects of the marketing support were talker screenings, online content, distribution of flyers and posters and young audience vox pops along with Turkish copy and network research. A range of regional support was offered via Film Hubs including preview screenings, support for special events; social media; freelance marketing support; regional press and advertising; support for flyer, poster and banner design & print.

Chevalier

- Distributor: Studiocanal
- Release date: 22 July 2016
- Box Office: £73,075
- Admissions: 9134

NRS support focused on drawing out the comedic elements of the film and a series of quirky assets including table-top games and beer mats were a key part of the campaign. A range of regional support was offered via Film Hubs including preview screenings, support for special events; social media; freelance marketing support; regional press and advertising; support for flyer, poster and banner design & print.

Sonita

- Distributor: New Wave
- Release Date: 21 October 2016
- Box Office: £12,496
- Admissions: 1562

The NRS campaign focused on driving ticket sales and online engagement with 16-25 year old, female-skewed, politically and socially aware audiences. A freelance marketing consultant

supported venues and commissioned and promoted online content. A range of regional support was offered via Film Hubs including preview screenings, support for special events; social media; freelance marketing support; regional press and advertising; support for flyer, poster and banner design & print.

The Fits

- Distributor: Lionsgate
- Release date: 24 February 2017
- Box Office: £6602
- Admissions: 825

The NRS campaign for this title (which was not scheduled for a theatrical release) focused on young people 16-25 and marketing support included print distribution, and targeted advertising and promotions. A range of regional support was offered via Film Hubs including preview screenings, support for special events; social media; freelance marketing support; regional press and advertising; support for flyer, poster and banner design & print.

The findings – Sectoral research

- All scales of exhibitors were influenced by the scheme, and it had the greatest impact on small and medium sized exhibitors.
- There is widespread awareness of both the New Release Strategy overall and of the particular titles amongst exhibitors in the Film Audience Network.
- The scheme positively influenced the majority of exhibitors in their decisions to book each of the NRS titles, and the scheme had the greatest impact on booking decisions for *Sonita*.
- The NRS achieved the highest number of exhibitor bookings in Film Hubs London, South West & West Midlands, and South East.
- Due to varying response rates for the exhibitor survey, the results should be considered indicative rather than representative.
- Whilst the NRS did have a significant impact on exhibitors' decision-making, other factors (primarily an opportunity to see the film in advance and therefore make an informed decision) also had a strong influence.
- Exhibitors were enthusiastic about the marketing resources provided and considered the key benefit to be saving time; digital assets and financial support for Facebook advertising were the most useful resources.
- In terms of improving the scheme, the main issue identified by exhibitors was providing a longer lead time for NRS titles.
- The key reasons behind exhibitors' decisions not to book an NRS title were an assessment of its audience and financial potential, and insufficient lead-in time.
- With the exception of *The Pearl Button* and *Sonita*, the majority of exhibitors who booked an NRS title used the marketing resources provided, and exhibitors were equally likely to use the centrally provided 'marketing pack' and specific Hub support.
- *Mustang* was, by some margin, the most booked NRS title and *The Fits* the least.
- Distributors are also mainly supportive of the scheme, and in their eyes the New Release Strategy is one and the same as the Film Audience Network. They are positive and enthusiastic about the difference the scheme has made to their release, although they find it harder to quantify its financial impacts. The process of working with the NRS team is widely praised. They suggest improving the programming process and developing more bespoke marketing resources as the key improvement to the strategy.
- The core team implementing the NRS are realistic about achieving the long term aims of the scheme. Their practical experience of implementing the scheme during these first twelve months has enabled them to identify clear areas for development of the scheme moving forward.

- Whilst all the Film Hubs across the Film Audience Network are supportive of the aims of the NRS, their practical engagement with the scheme varies considerably. More effective communication about the scheme overall, and programming decisions in particular, would enable them to better understand and engage with the scheme. Hubs have clear ideas about how the scheme could be improved.
- Film Societies/Community Cinemas are enthusiastic about the opportunity of the NRS; their key challenges are the lead times they require for programming and availability of screeners.
- Strategic partners are enthusiastic about the potential of the NRS overall, but don't feel their particular organisations' potential contribution is being realised. Their main involvement with the scheme is through the programming group and they feel this could work more effectively. They are positive about the role the Hubs could play.

The findings – Audience research

- Audience surveys were distributed via cinema's customer databases and as a result existing audiences are likely to be over represented in the results.
- Compared to the UK adult population, the NRS audience was more female, older, showed a larger proportion of white non-British visitors, and a smaller proportion of those with a disability. There was an over-representation of retired people compared with the population, and a larger proportion belonged to one of the 'Highly engaged' Audience Spectrum segments, in particular the 'Experience Seekers' segment.
- From title to title, the main differences in terms of demographics were *Chevalier* having a majority male audience, *Sonita* having an older age profile, *The Fits* having a younger-than-average age profile.
- Overall, NRS titles were more effective at presenting those who already attend FAN cinemas with titles different from what they would normally watch than encouraging new visitors to these venues.
- For around a quarter of the audience, the film was different to what they normally watch. *The Pearl Button* was most 'different' and *Mustang* was most in line with what the audience usually watched. Of those who said the film they saw was different from what they normally watched, most said that it showed another culture.
- Materials produced, or channels managed, by the cinemas (such as the venues' websites or emails) were the most common way in which audiences found out about the screenings.
- Although the most commonly cited motivation for coming to NRS screenings was "I like coming to watch films in this cinema", interest in the subject matter/story and enjoying films of this genre were mentioned by around half the audience. When looking at the main reasons people chose to see a particular film, the response varied from title to title.

- Over two thirds felt they had learnt something from watching the film. This varied significantly across the titles, with audiences at *Sonita* and *The Pearl Button* being most likely to have learnt something. Just under a third of respondents took part in a related activity such as Q&As, discussions, and online. Across the five titles, the words most often chosen to describe how the film made the respondent feel were sad, angry, happy and uplifted.
- Almost all NRS attenders said they would be very likely or likely to attend a similar event or screening in the future, and 96% of those who were experiencing something different from what they usually watch would be likely or very likely to see something similar in the future.
- The overall experience was rated highly across the board, with an average rating of 4.5 out of five, and open-ended feedback revealed generally positive feedback on the films – both in and of themselves and towards supporting the programming of these kinds of films.

Conclusions

What is working well

- There is widespread support and enthusiasm across the independent exhibition and distribution sector for the New Release Strategy and what it is trying to achieve,
- The scheme has successfully encouraged exhibitors, particularly smaller and mid sized, to screen a wider range of titles; more than 200 exhibitors across the FAN network showed at least one of the NRS titles.
- The NRS has successfully broadened audience choice; one in four audience members were introduced to a type of film they wouldn't usually watch.
- Audiences feel very positive about their new film experience and NRS titles were particularly successful in terms of showing other cultures and introducing audiences to foreign language films.
- More than three quarters of audience members considered they had learnt something as a result of watching the film, and almost one third were involved in other activity around the film they watched.
- The marketing pack is highly valued by both exhibitors and distributors.
- The Project Manager is universally praised for their enthusiasm and efficiency, and the process of liaison with distributors is running very smoothly.

Areas for development

- Levels of understanding of the scheme vary across Hubs, exhibitors and distributors, and there is some confusion about the scheme's overall aims and objectives and process.

- There is a need for closer collaboration and improved communication between the programming group, Hub managers and exhibitors.
- The process of selecting titles could be improved.
- Film Hubs have a key role to play in the scheme's success and could be more engaged.
- The potential contribution of Strategic Partners isn't currently fully realised.
- Providing as long a lead time as possible would enable more exhibitors to take part.
- A more strategic approach would be welcomed.
- The evaluation methodology could be improved.

In many respects implementing the New Release Strategy during the last twelve months has illustrated the issues faced by the BFI Film Audience Network in general:

- The complexity of balancing a UK wide approach with the varying needs and issues of individual Hubs responding to regional specificities
- Programmes and initiatives being programme led rather than audience informed, and limited audience expertise and capacity across the network
- Lack of clear and shared understanding of roles and responsibilities
- The challenge of Hubs focusing on their own initiatives and the 'not invented here' barrier to collaboration and partnership working
- The temptation to initiate numerous projects rather than fewer, large scale initiatives
- The value of a central co-ordinating function

Recommendations

Following the NRS strategy day, the team are already developing a number of aspects of the scheme, including some of the points suggested below.

Improving understanding of, and engagement with, the scheme

- A short and focused consultation by the NRS core team, with invited Hub and exhibitor representatives could:
 - Clarify the overall aims and process of the scheme
 - Review the programming process
 - Clarify the role and responsibilities of Hubs
 - Improve consultation and communication between the Programme group, Hubs and exhibitors
- Once there is agreement about the refined shape, structure and process of the NRS, the scheme should be 're- launched' to Hubs, exhibitors, distributors and partners with clear messages about its purpose and how it will work.

- We suggest specific developments below, but would recommend that that the scheme is reviewed and refined by those who are key to its success – Hub staff and exhibitors.

Improving the process for selecting titles

- The programming process could be aligned with Screening Days.
- Selection of titles should be informed by
 - ‘Challenging’ titles in the context of smaller and mid scale exhibitors
 - A minimum window of time required for an NRS title

Adopting a more strategic approach

- There should be discussions with the BFI as soon as possible to clarify the situation with the new ‘Audiences’ Fund.
- The NRS should be aimed at smaller and medium sized exhibitors; marketing resources and support should therefore be focused on achieving this objective.
- Opportunities to align the NRS with existing similar initiatives should be explored.
- Titles should be selected with a consistent target audience in mind, whilst still creating responsive and flexible campaigns based on the selling points of the particular title selected.

Maximising the potential of Hubs

- Hub staff should have strong representation in the consultation noted above, and specifically
 - Hub staff need to proactively identify and engage key exhibitors in their area with the scheme
 - Regional marketing co-ordinators could be appointed on a freelance basis (budget allowing) to provide focused specialist support for exhibitors

Improving the evaluation process

- The evaluation process should be simplified and streamlined to try and ensure more representative audience and exhibitor data is obtained for the next stage.