Summary of the Report on the Film Policy Review Online Survey

Contents

1. Introduction

To assist consideration of the issues raised by the Film Policy Review (FPR), the FPR team conducted an online survey open to film practitioners and members of the public. The survey was accessed via the DCMS website and was open from 24 June to 20 September 2011. The survey consisted of 21 multiple choice and 68 open text questions covering the topics listed in the contents to this report. Respondents were asked to identify their area(s) of professional interest and expertise (distributor, film archives, producer etc) so that the answers could be explored if necessary by sub-sector of interest. A breakdown of respondents by areas of interest is shown in section 3 below.

By the closing date, 252 responses had been received. This report summarises the responses and identifies the key issues raised.

2. Method of analysis

2.1 Multiple choice questions

The responses to the multiple choice questions (eg yes/no/don't know) are reported as frequency distributions of the answers given.

2.2 Free text questions

The free text responses had to be coded before they could be summarised. The method was for the coder to read through the answers and note emerging themes. When the responses became repetitive, the coder produced a final version of the codes, aiming for between 5 and 15 codes per question depending on the variety of responses. Indicators were then added to each response showing which codes applied to that response. The coding frame was determined not from a set of pre-conceived categories but by examining the answers received in relation to the question asked. In reading the results the following points should be noted:

- Not all respondents answered all questions, so the number of responses on some issues is fewer than the total number of responses received.
- Some respondents made several points in answer to a given question. Each of these points is coded into the results.
- In any such coding exercise some detail is lost. To examine particular issues the Film Policy Review team made reference to the original responses.

3. The Respondents

252 responses were received by the closing date of the survey. The respondents were invited to identify their ‘area of professional experience or expertise’ and were permitted to identify as many areas as their interests covered. In total respondents gave 608 designations, in the categories listed in Table 1:

Table 1: Areas of professional experience or expertise of the respondents

Area of interest or expertise	Frequency	Percent
Film Crew	92	15.1%
Film Skills provider	74	12.2%
Producer	67	11.0%
Film Education provider	65	10.7%
Sales Agent	48	7.9%
Creative Talent (e.g. writer, actor, director, editor, designer, composer)	47	7.7%
Public Organisation	46	7.6%
Professional Services Advisor (e.g. entertainment lawyer, talent agent, accountant)	38	6.3%
Exhibitor	26	4.3%
Audience	23	3.8%
Other	23	3.8%
Film Archives	19	3.1%
Financial investor in film	16	2.6%
Distributor	10	1.6%
Post production	10	1.6%
Industry trade body	4	0.7%
Total	**608**	**100.0%**

Note: The number of designations (608) is greater than the number of survey respondents (252).

A broad range of interests was represented in the survey responses, with respondents identifying most frequently as film crew (15.1%), film skills provider (12.2%), producer (11%), film education provider (10.7%), sales agent (7.9%) and creative talent (7.7%).

4. Overall view of the challenges and opportunities confronting the film industry

The survey began by asking respondents four questions about their overall views on the challenges and opportunities confronting the film industry. Their responses are summarised in Tables 2 to 5. Note that respondents were permitted to identify more than one issue for each question, so the number of issue-responses is greater than the number of respondents.

Table 2: What do you think are the key global challenges affecting the film industry in the next five years?

Description	Frequency	Percent
Changing media consumption patterns (online, mobile, short form, new entertainments) requiring new business models	129	26.2%
Piracy – challenge to traditional value chain	77	15.6%
Limited market access for UK films. US box office dominance. Polarisation between high budget Hollywood films and low budget British films.	63	12.8%
Other	45	9.1%
New technology (all parts of value chain)	44	8.9%
Lack of finance (decline in traditional sources)	38	7.7%
Recession/economic climate	24	4.9%
Finding and supporting new talent	21	4.3%
Commercial pressure for derivative content	20	4.1%
Stronger international competition (BRIC, Europe, South America etc)	17	3.4%
Declining market value of DVDs	11	2.2%
UK disadvantage compared with Europe which has stronger national support systems	4	0.8%
Total	**493**	**100.0%**

The top challenges were:

- Changing media consumption patterns (including competition from other entertainments such as video games) (26.2%).
- Impact of piracy on traditional revenues (15.6%).
- Effect of Hollywood dominance on the opportunities for UK films (in production, distribution and exhibition) (12.8%).

- The challenge of new technology in all parts of the value chain (including exhibition) (8.9%).
- Difficulty in raising finance (including the effect of declining pre-sale values) (7.7%)

Within 'Other' (9.1%) a number of respondents mentioned the challenges of archiving in the digital era and a few respondents mentioned sustainable (green) development.

Table 3: How can the British film industry best prepare to address these challenges?

Description	Frequency	Percent
Strengthen UK industry and core local audience (including exhibition access and use of tax incentives)	80	18.6%
Create affordable multi-platform (including new media) access to films	53	12.3%
Other	48	11.1%
Support talent (including new out-of-London talent)	45	10.4%
More commercial and original/ambitious approach by British producers, investors and public funders	36	8.4%
Improved business and technical skills	32	7.4%
Improved public-private and industry collaboration	31	7.2%
Reduce piracy by enforcement and education	30	7.0%
Improved film education	30	7.0%
New entry routes into the industry for people of ordinary means	14	3.2%
Improve quality of cinema experience	11	2.6%
International partnerships (including Eurimages)	11	2.6%
Invest more in development	8	1.9%
Slate financing and production	2	0.5%
Total	**431**	**100.0%**

The top ways to prepare to meet the challenges were:

- Strengthen UK industry and core local audience (18.6%).
- Create affordable multi-platform access to films (12.3%).
- Support talent (including new out-of-London talent) (10.4%).
- More commercial and original/ambitious approach by UK industry (8.4%).

- Improved business and technical skills (7.4%).
- Improve collaboration within industry and between industry and government (7.2%).

Within 'Other' (11.1%) a number of respondents mentioned green/sustainable initiatives and some respondents mentioned the challenge of digital conversion for independent cinemas.

Table 4: What do you think will be the main new opportunities for the global film industry in the next five years?

Description	Frequency	Percent
New distribution models (eg day and date, digital, multi-platform, VOD) to reach audiences better	157	46.7%
Digital production technologies lowering the cost of feature films	42	12.5%
Growing BRIC and global markets	37	11.0%
Digital cinema (including 3D) and cinema market generally	34	10.1%
Other	23	6.8%
International collaborations (including advantage of English language)	15	4.5%
New financing methods (eg crowd funding)	12	3.6%
Creativity combined with new technology	11	3.3%
Ageing population – film audience with particular tastes	5	1.5%
Total	**336**	**100.0%**

The main new opportunities for the global film industry were:

- New distribution models (46.7%).
- Lower production costs from digital technologies (12.5%).
- Growing BRIC[1] and other global markets (11%).
- Digital cinema and the continuing appeal of cinema generally (10.1%).

[1] Brazil, Russia, India, China.

Table 5: How, if at all, does the British film industry need to change to take advantage of these opportunities?

Description	Frequency	Percent
New distribution models using digital technology	57	17.4%
Other	50	15.2%
Quality/distinctness of British product	30	9.1%
Improve quality of training and education	29	8.8%
Product more internationally oriented	24	7.3%
More emphasis on commercially viable UK films and business approaches	23	7.0%
Invest in new talent	23	7.0%
Better grasp of new technology	19	5.8%
Increase UK audience for UK film	17	5.2%
More diversity among gatekeepers (less nepotism) and diversity generally, including more effort outside London	15	4.6%
More access to digital screens for UK product	12	3.7%
Increased broadcaster participation	9	2.7%
Stronger emphasis on development	7	2.1%
Fairer employment practices (eg less unpaid work; more diversity)	7	2.1%
Increase UK broadband speeds	2	0.6%
Scrap the digital print fee	2	0.6%
Reduce the use of foreign skilled labour in the UK industry	2	0.6%
Total	**328**	**100.0%**

Note: The frequency of 'other' (n=50) in this table is high, but many of the responses classified under 'other' were generalised answers (eg 'be flexible') rather than concrete suggestions.

The main changes the British industry needs to make to take advantage of the new opportunities were:

- Create new distribution models using digital technology (17.4%).
- Quality/distinctness of British product (9.1%).
- Improve quality of training and education (8.8%).
- Product more internationally oriented (7.3%).
- More emphasis on commercially viable UK films and business approaches (7%).
- Invest in new talent (7%).

Within ‘Other’ (15.2%) a number of respondents suggested improvements to the cinema experience/environment.

5. Development Questions

Table 6: What do you think is the most important issue to be addressed in the future deployment of public funds for development?

Description	Frequency	Percent
More risk-taking to ensure that public funds support films that are culturally significant/relevant (not simply commercial) as well as a diversity of cultural forms (eg. particularly children's films as well as shorts, documentary, artists' films, multimedia forms)	49	19.5%
Establishing a clear range of development funding options - from entry-level initiatives (to support new writers/directors and existing talent) to slate funding for production companies	32	12.7%
Clear overall strategy for the allocation of funding for a) different types of films and b) new and existing talent (ideas include quotas)	25	10.0%
A wider, more diverse and experienced group of 'gatekeepers' making transparent, objective funding decisions	24	9.6%
Nurturing talent - greater encouragement of and investment in new talent (while supporting existing talent)	24	9.6%
Other (including using public funds to stimulate private investment, new mechanism for acquiring rights and options that doesn't just favour broadcasters and larger production companies, greater coordination with other development funders such as the BBC and investing in script editors)	23	9.2%
Greater integration between training/education courses and the industry and increased training and support for writers/directors throughout career (mentoring, industry courses etc)	21	8.4%
Greater understanding of development as vital R & D and crucial investment in industry - ie not money that will necessarily be recouped (stop reliance on producers shouldering development costs and/or punitive recoupment provisions).	15	6.0%
A more flexible development process that can be adapted to suit projects and gives greater freedom to their originators (not just a literary process - workshopping, group writing etc.)	14	5.6%
Allowing producers greater freedom in distributing development funds and guiding the development process	13	5.2%
Development not seen as separate from production and distribution - consideration of audience/finance/rights	11	4.4%

etc. built into the process		
Total	**251**	**100.0%**

The most important issues to address in public funding for development were felt to be:

- More risk taking for cultural significance and diversity (19.5%).
- Establishing a clear range of development funding options (12.7%).
- A clear overall strategy for the allocation of funding (10%).
- A wider group of gatekeepers making transparent decisions (9.6%).
- Nurturing talent (9.6%).

Table 7: Do you think that the way Lottery funding is used for development needs to change in any way?

Response	Frequency	Percent
Yes	110	70.5%
No	9	5.8%
Don't know	37	23.7%
Total	**156**	**100.0%**

A large majority (71%) felt that changes did need to be made in the way Lottery funding is used for development.

Table 8: Why do you think that? (Answer to Table 7)

Description	Frequency	Percent
Other (including using need for new approach to IP and reconsideration of 'cultural' criteria)	33	23.7%
Focus of funding has gone to too few established companies/talent and is too Londoncentric	22	15.8%
Need for more risk-taking to ensure that public funds support films that are culturally significant/relevant (not simply commercial) as well as a diversity of cultural forms (eg. particularly children’s films as well as shorts, television, documentary, artists’ films, multimedia forms)	19	13.7%
Ensure a wider, more diverse and experienced group of 'gatekeepers' making transparent, objective	17	12.2%

funding decisions		
Funds should be distributed by wider range of organisations, in particular developing links between funds to existing training centres/HE courses	12	8.6%
Need to create sustainable industry by empowering independent producers to make decisions about the allocation of funds and allowing them to guide the development process	11	7.9%
Funding has not resulted in a diversity of voices and has not properly supported and nurtured new talent	9	6.5%
A more flexible development process that can be adapted to suit projects and gives greater freedom to their originators (not just a literary process - workshopping, group writing etc.)	6	4.3%
Too few projects have been realised	5	3.6%
Development process should not seen as separate from production and distribution - consideration of audience/European and global marketplace etc. built into the process	5	3.6%
Total	**139**	**100.0%**

The main reasons given for making changes in the way Lottery funding is used for development were:

- Too much funding goes to established and London-based companies (15.8%).
- More risks should be taken for culturally significant and diverse films (13.7%).
- Gatekeeping should be more transparent and diverse (12.2%).
- Some funding should go to training/HE courses (8.6%).

Table 9: Should 'slate funding' be considered in the future?

Response	Frequency	Percent
Yes	81	51.9%
No	57	36.5%
Don't know	18	11.5%
Total	**156**	**100.0%**

A small majority (52%) was in favour of considering slate funding. A sizeable minority (36.5%) was opposed.

Table 10: Why do you think that? (Answer to Table 9)

Description	Frequency	Percent
Slate funding can support the development of a more sustainable industry, allowing production companies to spread risk, plan for the long-term and reinvest	48	25.5%
Slate funding call allow for the championing of smaller, riskier projects alongside larger projects	33	17.6%
There is a risk slate funding ends up channeling money into the hands of a few (ie. benefits more established or larger production companies). Any scheme must consider how to engage with smaller companies and independent producers.	33	17.6%
Other	25	13.3%
Projects should be judged on their individual merit not as part of a package	17	9.0%
Producers are experienced and better placed to develop talent and marketable projects	13	6.9%
There is a risk that slate funding is open to abuse by producers/companies - ie. used to cover overheads, as cashflow and not reinvested	8	4.3%
Slate funding should be accompanied by a mechanism for monitoring quality and viability	7	3.7%
Slate funding can help to stimulate commercial partners and investment	2	1.1%
Public funds should not be used to sustain the production industry but spent on cultural and artistic film	2	1.1%
Total	**188**	**100.0%**

The divided opinion on slate funding was reflected in the reasons given for the Table 9 answers:

- Those that favoured slate funding believed it would spread risk and make the industry more sustainable (25.5%) or allow the championing of smaller, riskier projects (17.6%).
- A sizeable group was not keen on slate funding because of the risk that it would channel money into too few hands (17.6%)

- Some also thought that projects should be judged on their individual merits (9%) or that producers were better placed to judge talent and projects (6.9%).

Table 11: Do you think that script content being developed in the UK should reflect our diverse population in the 21st Century?

Response	Frequency	Percent
Yes	128	80.5%
No	23	14.5%
Don't know	8	5.0%
Total	**159**	**100.0%**

A large majority (80.5%) of those responding to the question favoured script content reflecting the UK's diverse population.

Table 12: Why do you think that? (Answer to Table 11)

Description	Frequency	Percent
It is good for films to reflect the society and culture in which they are made and to speak to different ages and backgrounds (including not only minorities but also children etc)	90	40.0%
It can be counterproductive to impose a criteria for diverse script content (stifling creativity) and it should be encouraged to develop naturally	32	14.2%
Films that reflect culture and society attract and grow new audiences	24	10.7%
Public funders should not seek to influence content but focus on quality and viable projects	24	10.7%
It is equally (and/or more) important to encourage new, original and diverse voices (ie. Talent) rather than focus on script content	19	8.4%
Films should engage with universal themes that speak to UK audiences as well as audiences abroad	16	7.1%
Films that reflect contemporary society and culture are desirable as are other stories (historical, global, experimental etc)	12	5.3%
Other	8	3.6%
Funding 'gatekeepers' need to be more diverse	0	0.0%
Total	**225**	**100.0%**

Regarding script content reflecting the diversity of UK society:

- The largest group (40%) favoured diverse script content as something inherently good.
- Some (10.7%) saw diversity as a way of building audiences.
- A minority was wary of attempts to influence script content, feeling that creativity (14.2%), quality and viability (10.7%) were more important.

Table 13: Do you have any other suggestions for improving the UK film industry's approach to script development?

Description	Frequency	Percent
Other	40	30.5%
Establish stronger links with education and a range of training opportunities for screenwriters at every stage in their career	19	14.5%
Provide more opportunities for writers, filmmakers and producers to connect and share knowledge (including calling on the experience of established talent)	19	14.5%
Link training to the industry	12	9.2%
More power to producers to guide development and nurture talent	10	7.6%
Invest in production businesses	8	6.1%
Don't concentrate decision making in the hands of few but encourage diversity of/in decision makers	8	6.1%
More risk-taking to ensure bolder and more varied films	6	4.6%
Improve regional spread of funding	4	3.1%
Prioritise the script, don't second guess the market	3	2.3%
Improve access to funders (ability to meet/talk to funders)	2	1.5%
Total	**131**	**100.0%**

The most popular further suggestions were:

- Stronger links with education and training (14.5% and 9.2%).
- More knowledge sharing opportunities for writers, filmmakers and producers (14.5%).
- More power to producers to guide development and nurture talent (7.6%).

6. Production Questions

Table 14: What do you think is the most important issue to be addressed in the future deployment of public funds for production of British films?

Description	Frequency	Percent
Seek sustainability of a genuinely indigenous British industry (various ideas floated include British quota, levy on ticket sales etc)	41	22.5%
Don't subsidise studio projects which would have happened anyway: only subsidise cultural projects, which would not otherwise take place	31	17.0%
Support for new and risk-taking talent, more than for established talent	29	15.9%
Other (including technology change, impact of convergence; IP issues)	28	15.4%
Ensure transparency, accountability and objectivity in processes for decision-making about funding	23	12.6%
Encourage inward investment: shooting of overseas productions in UK	13	7.1%
Support other cultural forms besides feature film (eg. shorts, documentary, artists' films, children's films, multimedia forms)	10	5.5%
Increase emphasis on commercial success	7	3.8%
Total	**182**	**100.0%**

The top four issues to be addressed in the allocation of public funds for British film production were:

- Seek sustainability of a genuinely indigenous British industry (various ideas floated include British quota, levy on ticket sales etc) (22.5%).
- Support cultural projects that are not going to get studio support (17%).
- Support new talent more than established talent (15.9%).
- More transparency and objectivity in funding decisions (12.6%).

Table 15: Do you think that the way Lottery funding is used for production of British films needs to change in any way?

Response	Frequency	Percent
Yes	126	75.4%
No	8	4.8%
Don't know	33	19.8%
Total	**167**	**100.0%**

A large majority (75.4%) of those responding to the question thought that change was needed in the way Lottery funding is used for production of British films.

Table 16: Why do you think that? (Answer to Table 15)

Description	Frequency	Percent
Other	55	32.9%
Not enough diversity (need for more children's films mentioned several times)	36	21.6%
Should not be duplicating commercial funds	17	10.2%
Need more rigour / professionalism	14	8.4%
Need more support for emerging talent	13	7.8%
Sometimes unfairly distributed	12	7.2%
Needs to be more producer-friendly	12	7.2%
Less red tape	8	4.8%
Total	**167**	**100.0%**

Note: the proportion of "other" in Table 16 is high, but many of the comments were indeterminate and difficult to classify.

The most common distinct reasons for wanting change in the way Lottery funding is used for the production of British films were:

- Need for more diversity (eg children's films) (21.6%).
- Should not be duplicating commercial funds (10.2%).
- Need for more rigour and professionalism (8.4%).

Table 17: Should development and production support for British films be in one fund or more?

Response	Frequency	Percent
One fund	48	28.6%
More than one fund	99	58.9%
Don't know	21	12.5%
Total	**168**	**100.0%**

The majority (58.9%) favoured development and production support for British films to be delivered by more than one fund.

Table 18: Why do you think that? (Answer to Table 17)

Description	**Frequency**	Percent
Need to maintain/increase seamless joined-up-ness	43	29.9%
Diversify voice/taste of decision makers	39	27.1%
Development and production are different disciplines	24	16.7%
Other	22	15.3%
Separate different types of project eg. innovative/traditional, large/small, funds for children's films, documentaries etc	16	11.1%
Total	**144**	**100.0%**

Those in favour of separate funds felt that the voice/taste of decision makers needed to be diversified (27.1%) or that development and production are different disciplines (16.7%).

Those favouring a single fund gave the need for 'seamless joined-up-ness' as their principal reason (29.9%).

Table 19: Government would like to help build viable independent UK film companies. How can this best be achieved? For example, should Government be developing policy to focus support on companies as well as individual productions?

Description	**Frequency**	Percent
Directly encourage or support companies	71	35.5%
Other	39	19.5%
Focus on distribution reach; or on distribution model including producer profit share	24	12.0%
Encourage slate development	12	6.0%
Support and training	12	6.0%
Risks of unintended consequences (eg. cronyism, squeezing out smaller companies)	10	5.0%
Tax and other financial incentives	9	4.5%
Individual projects are the basis of the industry	9	4.5%
Not the state's business and/or will introduce market distortions	7	3.5%
Improve working conditions within the companies and industry	7	3.5%
Total	**200**	**100.0%**

The most supported means of building viable independent UK film companies were:

- Directly encourage or support companies (35.5%).
- Focus on distribution reach or on distribution model including producer profit share (12%).
- Encourage slate development (6%).
- Support and training (6%).

A minority of respondents was concerned about unintended consequences such as cronyism (5.0%), or felt that individual projects were the basis of the industry (4.5%).

Most responses under 'directly encourage or support companies' were general rather than specific. There was concern about company survival during the long phase of film development and a general worry about lack of revenues flowing back to film companies.

Table 20: The level of Tax Relief itself is not within the scope of this Review. However, do you think the way film Tax Relief is used needs to change in any way?

Response	Frequency	Percent
Yes	96	57.1%
No	24	14.3%
Don't know	48	28.6%
Total	**168**	**100.0%**

A majority who responded to the question (57.1%) felt the Tax Relief needs to be changed in some way.

Table 21: Why do you think that? (Answer to Table 20)

Description	Frequency	Percent
Various suggestions for structural change	42	31.6%
Britishness of crews and of destination of profits is a consideration; UK films shot abroad should be supported	24	18.0%
Other	20	15.0%
Vital to industry sustainability	17	12.8%
Not generous enough	13	9.8%
Ain't broke – don't fix	12	9.0%
Too complicated	5	3.8%
Total	**133**	**100.0%**

The largest respondent group (31.6%) felt that the relief could be amended to give more support to the UK industry. 18% thought more recognition could be given to Britishness of crews, destination of profits and overseas expenditure on UK films.

Table 22: Do you think the role of the UK broadcasters in the film industry needs to change?

Response	Frequency	Percent
Yes	114	69.1%
No	19	11.5%
Don't know	32	19.4%
Total	**165**	**100.0%**

A significant majority (69.1%) felt that the role of UK broadcasters in the film industry needs to change.

Table 23: Why do you think that? (Answer to Table 22)

Description	Frequency	Percent
Greater involvement and investment in funding, production etc, and in showing UK films	68	34.7%
Other	24	12.2%
Support wider range of film types, including community, documentary, animation	22	11.2%
More involvement by ITV/ C5 / Sky etc	21	10.7%
Comments focused on C4 / Film 4 – positive	16	8.2%
Comments focused on BBC – positive	12	6.1%
Not a matter for government and/or working fine already	9	4.6%
Comments focused on BBC – critical	9	4.6%
Focus on curatorial/ educational 'publishing' role	9	4.6%
Comments focused on C4 / Film 4 – critical	6	3.1%
Total	**196**	**100.0%**

The main reasons given for wanting a change in broadcaster involvement were:

- There should be more involvement in funding, production and showing of UK films (34.7%).
- There should be support for a wider range of film types (11.2%).
- There should be more involvement by ITV/C5/Sky etc (10.7%).

Table 24: Should closer integration of production companies with distribution be encouraged?

Response	Frequency	Percent
Yes	97	58.4%
No	27	16.3%
Don't know	42	25.3%
Total	**166**	**100.0%**

A majority (58.4%) supported the encouragement of closer integration of production companies with distribution.

Table 25: Why do you think that? (Answer to Table 24)

Description	Frequency	Percent
Importance of holistic approach, with distribution part of total plan for a film from the outset	67	53.2%
Other	20	15.9%
Should be encouraged but not imposed	19	15.1%
Fundamentally separate sectors / risk of tail wagging dog	11	8.7%
Technology change – convergence and diversity of platforms – changes the landscape	9	7.1%
Total	**126**	**100.0%**

The main reason given for supporting closer integration of production and distribution is that an holistic approach is important, with a distribution plan at the outset (53.2%).

Final production question: Do you have any other suggestions for improving the way funding for production of British films is used to benefit the creative community and British audiences?

The responses to this question were found to be too diverse to code.

7. Distribution Questions

Table 26: What do you think is the most important issue to be addressed regarding the UK film distribution business? How might the issue be resolved?

Description	**Frequency**	**Percent**
Government support to fund and promote British films incl. small distributors	24	13.1%
Incentivise planning/improve cinemas to enable more independent distributors	21	11.5%
Other	20	10.9%
Need for incentives for diverse programming	18	9.8%
Direct intervention/funds helping distributors release more difficult titles	15	8.2%
Increased & more sophisticated film marketing for increased audience engagement and to compete with Hollywood films	14	7.7%
Respond to demand for film multi-platforms	14	7.7%
Need to move away from window distribution and embracing global day and date releasing	12	6.6%
Government to foster a collaborative film industry producing, distributing and exhibiting British film	12	6.6%
Piracy issues lowering income of the distribution market	11	6.0%
Redress power relationship between exhibitors and distributors through legislation	7	3.8%
UK film presence in global market	5	2.7%
Educate film audiences to change the current negative image of British film	4	2.2%
Improved education in curating serving audience demand for more local programme models	3	1.6%
Copyright law to adapt to suit a connected and digital world	3	1.6%
Total	183	100.0%

The most frequently identified solutions to distribution issues were:

- Government support to fund and promote British films including small distributors (13.1%).
- Incentivise planning/improve cinemas to enable more independent distributors (11.5%).
- Incentives for diverse programming (9.8%).
- Direct intervention/funds helping distributors release more difficult titles (8.2%).

Table 27: Do you think Lottery funding for distribution needs to change in any way?

Response	Frequency	Percent
Yes	84	53.5%
No	7	4.5%
Don't know	66	42.0%
Total	**157**	**100.0%**

A majority (53.5%) favoured change in Lottery funding for distribution. There was a large group of 'don't knows' (42%).

Table 28: Why do you think that? (Answer to Table 27)

Description	Frequency	Percent
Lottery funds to be distributed more fairly and widely to enhance opportunities and enable competition	33	29.2%
More funding for marketing and audience development	18	15.9%
Funding for alternative streams	16	14.2%
Lottery funds to support British films	9	8.0%
Other	9	8.0%
Enable availability of a wider range of films (both British & foreign) through offering support with VPF costs	7	6.2%
Funding for roll-out of digital projectors enabling low budget UK films to be screened	5	4.4%

Funds to go to development and production	4	3.5%
Abolish distribution subsidies	4	3.5%
Funding to be awarded to film hubs rather than single films	3	2.7%
Funding allocation not in the public's interest	3	2.7%
Lottery funding to help distributors acquire and market foreign language film to UK children	2	1.8%
Total	**113**	**100.0%**

The main changes desired in Lottery funding for distribution were:

- Fairer/wider distribution to enhance opportunities and enable competition (29.2%).
- More funding for marketing and audience development (15.9%).
- Funding for alternative streams (14.2%).

Table 29: An aim of Government policy since 2000 was to increase the market share of UK films in the UK market. Should this still be an aim?

Response	**Frequency**	**Percent**
Yes	136	82.4%
No	18	10.9%
Don't know	11	6.7%
Total	**165**	**100.0%**

A large majority (82.4%) felt it should be an aim of Government policy to increase the market share of UK films in the UK market.

Table 30: Why do you think that? (Answer to Table 29)

Description	Frequency	Percent
Commercial, economic and cultural imperative	46	25.8%
Develop UK film for a UK audience (UK audience development)	28	15.7%
Counterbalance US domination on UK screens	19	10.7%
Product needs to be quality based not quota based	17	9.6%
Introduction of quotas to screen British film	12	6.7%
A sustainable UK film industry requires UK government support which leads to expertise for smaller UK film companies and further growth	11	6.2%
Greater choice of UK film for audiences - UK and global	11	6.2%
UK film needs to be supported to be competitive globally	9	5.1%
Government to facilitate production of good British film - the remaining film chain is already strong enough without support	9	5.1%
Industry needs to professionalised for greater commercial focus	7	3.9%
Other	4	2.2%
Return of Eady Levy on US films - ensures UK co-production	3	1.7%
Film market is global, local focus is an outdated business model	2	1.1%
Total	**178**	**100.0%**

The top reasons it should be Government policy to increase the UK market share of UK films were:

- Commercial, economic and cultural imperative (25.8%).
- Develop UK film for a UK audience (UK audience development) (15.7%).
- Counterbalance US domination on UK screens (10.7%).

A minority (9.6%) felt the product should be quality based rather than quota based.

Table 31: What are the implications of new distribution models now entering the industry?

Description	Frequency	Percent
More choice and diversity	23	14.6%
New distribution models threatening cinemas	20	12.7%
Other	20	12.7%
Chaos and opportunity	14	8.9%
Quicker and less expensive distribution	13	8.2%
Greater audience reach through market fragmentation	13	8.2%
More evenly distributed power & incomes for filmmakers, producers and distributors	13	8.2%
Dangers of Piracy	9	5.7%
Greater opportunities for independent filmmakers through direct sale of product in the digital world, leading to ownership and generating income	8	5.1%
Reduced marketing spend and less legal barriers	5	3.2%
Less focus on making theatrical British films, affecting new talent coming into production	4	2.5%
New ways to finance films and development	4	2.5%
UK film needs to take advantage of new distribution channel s to remain internationally competitive	4	2.5%
Digitizing UK cinemas and introduction of VPF Financing prohibitive to independent film distribution	2	1.3%
Standardisation and future proofing required to prevent wasting resources	2	1.3%
Greater collaboration between producers and distributors	2	1.3%
Government to ensure ultrafast broadband speeds	2	1.3%
Total	**158**	**100.0%**

The implications of new distribution models most frequently identified were:

- More choice and diversity (14.6%).
- A threat to cinemas (12.7%).
- Chaos and opportunity (8.9%).
- Quicker and less expensive distribution (8.2%).
- Greater audience reach through market fragmentation (8.2%).

- More evenly distributed power and incomes for filmmakers, producers and distributors (8.2%).

Table 32: If you think Government has a role in addressing these implications, please tell us what you think that should be.

Description	Frequency	Percent
Other	20	16.6%
Government to protect and encourage national film product	18	15.0%
Government to foster innovation throughout the film chain	12	10.0%
Not a government issue	12	10.0%
Government to keep abreast of latest developments and to ensure training in order to react to these challenges	10	8.3%
Government to legislate rights, piracy and business models for multimedia platforms	10	8.3%
Funding for transmedia	9	7.5%
Government to protect theatrical exhibition sector	9	7.5%
Government to manage piracy, for example payable downloads to keep	7	5.8%
Government to set up funding panels ensuring transparency and representing diverse needs	3	2.5%
Government to understand and apply ways of working of National funding bodies that work	3	2.5%
Government to create a digital infrastructure	3	2.5%
Government to run as a steering group, offering structure and guidelines of funding, incentives and standards	2	1.7%
Dialogue between different funding bodies	2	1.7%
Total	**120**	**100.0%**

The most popular proposed Government responses to the implications of new distribution models were:

- Government to protect and encourage national film product (15%).
- Government to foster innovation throughout the film chain (10%).
- Government to ensure training to keep abreast of latest developments (8.3%).

- Government to legislate rights, piracy and business models for multimedia platforms (8.3%).

A minority felt that it was not a government issue (10%).

Table 33: Is there a role for Government in stimulating digital innovation in distribution?

Response	Frequency	Percent
Yes	107	65.2%
No	24	14.6%
Don't know	33	20.1%
Total	**164**	**100.0%**

A majority of respondents to the question (65.2%) suggested there is a government role in stimulating digital innovation in distribution.

Table 34: Why do you think that? (Answer to Table 33)

Description	Frequency	Percent
No role for the government - markets are self-regulating	21	15.6%
Digital innovation requires government support	19	14.1%
Government to facilitate digital infrastructure	14	10.4%
Government to facilitate digital innovation	10	7.4%
Government support as a sign of commitment to UK film	9	6.7%
Government to encourage use of digital projection to transform repertory offerings and national spread	9	6.7%
Investment to ensure a digital future	8	5.9%
Other	8	5.9%
Government to take a control function	7	5.2%
Subsidies for independent companies to play a part in the digital future	5	3.7%
Government to address and legislate piracy	5	3.7%
Government to fund audience-centric innovation projects	5	3.7%

Government to keep abreast of trends and to educate	4	3.0%
Government not abreast of trends	4	3.0%
Government to offer broadcasting platforms to communities across the UK	4	3.0%
Subsidies for digital innovators	3	2.2%
Total	**135**	**100.0%**

The most popular reasons for Government having a role in digital innovation were:

- Digital innovation requires government support (14.1%).
- Government to facilitate digital infrastructure (10.4%).
- Government to facilitate digital innovation (7.4%).

A minority of responses (15.6%) felt there is no role for Government and that markets are self-regulating.

Table 35: Do you think Government policy in relation to film piracy needs to change in any way?

Response	Frequency	Percent
Yes	79	47.9%
No	38	23.0%
Don't know	48	29.1%
Total	**165**	**100.0%**

A minority (47.9%) of respondents to the question wanted a change in Government policy towards film piracy. There was a high percentage of 'don't knows' (29.1%).

Table 36: Why do you think that? (Answer to Table 35)

Description	Frequency	Percent
More enforcement around piracy	25	15.7%
Treat piracy like theft	16	10.1%

Other	14	8.8%
Educate the effects of piracy	13	8.2%
Understand motivations for illegal downloading to find new ways to engage audiences away from piracy	13	8.2%
Linking ISPs to illegal downloads	13	8.2%
Piracy highlights an appetite for film coupled with a lack of distribution choice and steep cinema prices	12	7.5%
Not a government issue	10	6.3%
Understand piracy in order to engage with those who breach copyright	9	5.7%
Vigilance should be in the hands of the studios not the government	7	4.4%
Different approaches over and beyond punitive ones are required to tackle piracy	7	4.4%
Government action or non-action determines a narrow or broader development of film audiences	5	3.1%
Government role is to keep abreast of piracy and underlying piracy issues	5	3.1%
Agreement between countries to shut down source of piracy	3	1.9%
Address windows issue and make product available on multiplatform	3	1.9%
Government to support smaller companies with lack of funds to litigate	2	1.3%
Charge internet providers for content to be viewed with an organisation collecting royalties for content makers	2	1.3%
Total	**159**	**100.0%**

Most responses suggesting a change in Government policy towards film piracy wanted tougher enforcement:

- More enforcement around piracy (15.7%).
- Treat piracy like theft (10.1%).
- Link ISPs to illegal downloads (8.2%).

On the other hand a sizeable group wanted more engagement with actual or potential consumers of pirate product, including through business models that make legal product more available:

- Educate the effects of piracy (8.2%).
- Understand motivations for illegal downloading to find new ways to engage audiences away from piracy (8.2%).
- Piracy highlights an appetite for film coupled with a lack of distribution choice and steep cinema prices (7.5%).
- Understand piracy in order to engage with those who breach copyright (5.7%).
- Different approaches over and beyond punitive ones are required to tackle piracy (4.4%).

Table 37: Do you have any other suggestions for strengthening the UK's distribution sector?

Description	Frequency	Percent
Other	15	31.9%
Film distribution across the UK, not only London	5	10.6%
Platforms open to different content providers	4	8.5%
State-funded cinema	4	8.5%
Tax relief for those showing British films	4	8.5%
Make DVD available to film societies before DVD retail release	3	6.4%
UK tours for national focus	3	6.4%
BFI movie download channel	3	6.4%
Functioning digital monetising system	2	4.3%
Training schemes for digital distribution	2	4.3%
Tougher on piracy	2	4.3%
Total	**47**	**100.0%**

There was a small number of responses to this question, with the most popular suggestions being:

- Support for UK-wide distribution (10.6%).
- Opening platforms to different content providers (8.5%).
- State-funded cinema (8.5%).
- Tax relief for those showing British film (8.5%).

8. Exhibition Questions

Table 38: What do you think is the most important issue to be addressed for the future of theatrical exhibition of films? How might the issue be resolved?

Description	Frequency	Percent
Important to maintain and increase access to, and choice of, wide range of specialised film, across the whole of the UK (including ensure that British films get a theatrical release)	56	24.0%
Digital conversion / Survival of rural & community cinemas - Government support is needed to enable independent cinemas to get digital equipment (especially for smaller community and rural venues)	28	12.0%
Audience development and engagement (Education, outreach, contextual screenings, director talks, overcoming 'fear' of subtitles, etc), especially for younger people	21	9.0%
Quality Cinema Experience - Champion (and improve) quality of cinema experience, esp collective experience of film & Big Screen experience	16	6.9%
Exhibitors should utilise new digital technologies and platforms to create events, provide alternative content and make use of non-traditional venues	14	6.0%
Ticket prices are too high - lower them, or introduce variable prices for tickets	12	5.2%
Government support for Distributors dealing in specialised film (particularly to enable lower UK rental fees)	11	4.7%
Government acknowledgement of cinema's cultural & social significance and enrichment - make it part of the UK's cultural agenda	10	4.3%
Release Windows - Review and protect windows / enable smaller cinemas to get films earlier	10	4.3%
Changing media consumption patterns (online, mobile, pop-up, etc), requiring new business models	9	3.9%
Introduce (and enforce) incentives for exhibitors to screen non-mainstream films	9	3.9%
Support training (including digital projection, new technologies, and cultural business skills)	6	2.6%
Other	6	2.6%

Increase Publicity for British and Independent films	5	2.1%
Control / Reduce box office revenue taken by Exhibitors	4	1.7%
Ensure survival of Range of technologies - don't rely just on digital (or 3D)	4	1.7%
Virtual Print fees - Reduce or abolish them	4	1.7%
Support sustainable Film Festivals	3	1.3%
Maintain/Improve quality of British & Independent films (inc scripts)	3	1.3%
Control Piracy / Develop new licensing agreement opportunities for digital world	2	0.9%
Total	**233**	**100.0%**

The theatrical exhibition issues the responses most wanted to be addressed were:

- Access to specialised and British films across the whole of the UK (24%).
- Government support for digital conversion of independent cinemas (12%).
- Audience development and engagement especially for younger people (9%).
- Improve the quality of the cinema experience (7%).

Table 39: Is there a role for Government in stimulating innovation in relation to digital technologies in the exhibition sector?

Response	Frequency	Percent
Yes	93	64.1%
No	21	14.5%
Don't know	31	21.4%
Total	**145**	**100.0%**

The majority of respondents (64.1%) felt there is a role for Government in stimulating innovation in relation to digital exhibition technologies.

Table 40: Why do you think that? (Answer to Table 39)

Description	Frequency	Percent
Investment in digital infrastructure, (potentially with smaller, cheaper digital projectors) especially for smaller and independent cinemas, is important to enable their survival across the UK (and to thereby avoid a multiplex monopoly)	45	30.2%
Supporting research and innovation gives the sector (both public and private businesses) the means and motivation to develop and grow in new ways (inc. new products, services and operating models)	32	21.5%
Investment in innovation is important to maintain and increase access to, and new forms of engagement with, a diverse range of film, for audiences across the UK and abroad	31	20.8%
Further market interventions are unnecessary - cinemas are businesses	12	8.1%
The DSN initiative has not delivered the intended diversity. (If the scheme is to continue it should be properly enforced and monitored)	6	4.0%
Other	8	5.4%
Investment should be linked to the protection of screen access for independent & British film	4	2.7%
Invest in training for digital exhibition etc (to ensure standard of quality, and that the opportunities of digital are exploited)	4	2.7%
Innovation in the exhibition sector is already happening.	3	2.0%
Government needs to invest in bandwidth	2	1.3%
Continue to develop Archive access and Mediatheque type provision	2	1.3%
Total	**149**	**100.0%**

The principal reasons for a Government role in digital exhibition were:

- To assist the survival of independent cinemas (30.2%).

- To promote new products, services and operating models (21.5%).
- To enable audiences to access a diverse range of films (20.8%).

A minority (8.1%) thought that further interventions were unnecessary. A small group (4%) thought that the results of the Digital Screen Network were not diverse enough and needed more enforcement.

Table 41: Is there a role for public funding of independent cinema exhibition?

Response	Frequency	Percent
Yes	93	64.1%
No	21	14.5%
Don't know	31	21.4%
Total	**145**	**100.0%**

The majority of respondents to the question (64.1%) supported a role for public funding of independent cinema exhibition.

Table 42: Why do you think that? (Answer to Table 41)

Description	Frequency	Percent
Supporting independent cinemas (including rural, community, and organisations like BFFS) helps create and maintain important access to a diverse range of specialised film across the UK	88	35.1%
Independent cinema does not work to a commercial model - and hence should be supported to enable it to continue	53	21.1%
Independent cinema is culturally important and should be supported like any other art form; it promotes social cohesion, self-esteem, and national pride	33	13.1%
Support & incentivise innovation (including tax incentives), including new forms of exhibition	17	6.8%
Independent cinemas foster and encourage filmmaking talent - important to maintain and support this	17	6.8%

Independent and community cinemas also carry out valuable additional audience development, educational and outreach work. This should be supported.	15	6.0%
Invest in next generation - support training & skills	13	5.2%
Further government policy needed (not just funding) to stimulate growth and ensure a great British cinema	5	2.0%
Let market forces prevail	5	2.0%
Other	5	2.0%
Total	**251**	**100.0%**

The top reasons given for public funding for independent exhibition were:

- Helps to create and maintain important access to a diverse range of specialised film across the UK (35.1%).
- Independent cinema does not work to a commercial model, so needs support to continue (21.1%).
- Independent cinema is culturally important (13.1%).
- It would give support for innovation (6.8%) and talent development (6.8%).

Table 43: Do you have any other suggestions for how Government policy could change in relation to the exhibition sector?

Description	Frequency	Percent
Support the independent exhibition sector across the UK - as part of a sector-wide strategy recognising the importance of exhibition within sector, including building support for local cinemas into remit of Local Authorities, Arts Council, Lottery and the BFI	21	24.7%
Support exhibition venues at the heart of communities, especially smaller venues - support to include capital costs and development and both full-time and part-time or multi-use venues.	14	16.5%
Create exhibition digital networks - enabling the sharing of services, events (via satellite links) and expertise	6	7.1%

Other	8	9.4%
Introduce Screen Quotas to ensure British and independent film are widely available - (suggestions include enforcement of DSN pledge introduction of French levy-type system, etc)	5	5.9%
Remove/Reduce VAT on cinemas tickets (- other suggestions to reduce ticket price include introducing subsidies for exhibitors showing specialist film (so they charge lower rental fee, etc)	5	5.9%
Control Piracy / Develop new licensing agreement opportunities for digital world (inc. relax rules around educational screenings)	5	5.9%
Government acknowledgement and championing of cinema's cultural & social significance and enrichment - make it part of the UK's cultural agenda	4	4.7%
Invest in digital infrastructure, (potentially with smaller, cheaper digital projectors) - especially for smaller, community and independent cinemas	4	4.7%
Support organisations that in turn support smaller, independent venues (such as BFFS, ICO)	4	4.7%
Reduce exhibitor share of box office revenue - in favour of producers & distributors	3	3.5%
Exhibitors should utilise new digital technologies and platforms to create events, provide alternative content and make use of non-traditional venues	3	3.5%
Policy should improve access, engagement and available appropriate product for children and young people - via festivals, collaborative programming et al.	3	3.5%
Total	**85**	**100.0%**

The top “other” suggestions for changes in Government policy toward the exhibition sector were:

- Support the independent exhibition sector across the UK, including building support for local cinemas into remit of Local Authorities, Arts Council, Lottery and the BFI (24.7%).

- Help with capital cost and development for exhibition venues in the heart of the community (16.5%).
- Create digital networks for exhibition (7.1%).

9. UK film and the international market

Table 44: What is the most important issue to be addressed for the future of the UK's relationship with the international market?

Description	Frequency	Percent
Other	21	11.7%
A clear, strong and unique UK voice	20	11.1%
Globally accessible product - not parochial kitchen sink…	20	11.1%
Forge stronger international distribution links & innovation in distribution across borders	20	11.1%
Encourage more co-productions	17	9.4%
Support for film makers to attend international fairs and Festivals	15	8.3%
Less UK insularity and greater international focus	15	8.3%
Promotion of a contemporary UK culture	13	7.2%
Less US focus	10	5.6%
Support for UK skills development	7	3.9%
Join Eurimages which insures international distribution has to be in place	7	3.9%
New distribution models such as internet film distribution and ppv VOD	6	3.3%
Education and training	5	2.8%
Breakdown of national monopolies	2	1.1%
Funding and hosting worldwide and pan-European exchange of good practice	2	1.1%
Total	**180**	**100.0%**

The most important international market issues for the UK were:

- A clear, strong and unique UK voice (11.1%).
- Globally accessible product - not parochial kitchen sink (11.1%).
- Stronger international distribution links & innovation in distribution across borders (11.1%).

- Need for more coproductions (9.4%).

Table 45: Is there a need for the UK to engage more proactively with European initiatives relating to film?

Response	Frequency	Percent
Yes	98	71.0%
No	11	8.0%
Don't know	29	21.0%
Total	**138**	**100.0%**

A substantial majority (71%) felt the UK should engage more proactively with European initiatives relating to film.

Table 46: Why do you think that? (Answer to Table 45)

Description	Frequency	Percent
Rejoin Eurimages for networking, coproduction and funding purposes which would benefit the UK film industry	29	23.0%
Other	24	19.0%
Many benefits from working more closely with European initiatives such as diversity, distribution and revenue	20	15.9%
Europe demonstrated success in shared markets for cultural product	11	8.7%
Europe as an untapped resource	9	7.1%
Emulate successful European models for engaging audiences in domestic product	8	6.3%
Co-productions will lead to investment in the UK	8	6.3%
Take advantage of MEDIA programme	7	5.6%
Opening to Europe implies having to let go of US domination	7	5.6%
Europe as a whole should compete with Hollywood	3	2.4%
Total	**126**	**100.0%**

The top reasons for the UK to engage more proactively with Europe were:

- Rejoining Eurimages would benefit the UK industry in terms of networking and coproduction funding (23%).
- Diversity, distribution and revenue would be helped by working more closely with Europe (15.9%).
- Europe demonstrated success in shared markets for cultural product (8.7%).
- Europe is seen as an untapped resource (7.1%).

Table 47: Do you think co-production (as distinct from inward investment) is an important business for British film?

Response	Frequency	Percent
Yes	109	76.8%
No	11	7.7%
Don't know	22	15.5%
Total	**142**	**100.0%**

A substantial majority of those responding to the question (76.8%) felt that coproduction is an important business for British film.

Table 48: Why do you think that? (Answer to Table 47)

Description	Frequency	Percent
Co-production as an important source of funding	38	21.2%
Other	28	15.6%
Co-productions foster the exchange of knowledge, skills, culture and reaches new markets	25	14.0%
Co-productions are fundamental to creating international audiences	15	8.4%
Co-productions create more diverse productions	12	6.7%
Good for spreading risk and investment when looking to make successful international films	10	5.6%
Co-production as an opportunity to increase audience reach	9	5.0%
Co-productions as a model to broaden horizons	9	5.0%

Co-production as a way to bring revenue into the UK	8	4.5%
Co-productions help to break down UK insularity	6	3.4%
Ensure co-production model that rewards producers for making films outside of the UK and ownership & profit is retained in the UK	6	3.4%
Better functioning UK production needs to be our priority, not co-productions	6	3.4%
Co-production very important, requires reform of the tax system, re-introduction of the Eady levy and rejoining Eurimages	4	2.2%
Britain is a small country and needs to enter transnational collaborations	3	1.7%
Total	**179**	**100.0%**

The most common reasons for a positive attitude to coproductions were:

- Coproduction is an important source of funding (21.2%).
- Coproductions foster exchange of knowledge, skills, culture and reach to new markets (14%).
- Coproductions create international audiences (8.4%).
- Coproductions create more diverse productions (6.7%)
- Coproductions are good for spreading risk (5.6%)

Table 49: How can Government and industry ensure we engage effectively in new and emerging markets – for example, China and India?

Description	**Frequency**	**Percent**
Additional points of engagement and trade shows	30	18.0%
Support of co-production treaties and assisting international initiatives	27	16.2%
Other	27	16.2%
Promoting partnerships	20	12.0%
Incentives and delegations	15	9.0%
Reaching new audiences in new territories through support in promotion and exhibition	10	6.0%
Understand the new market audiences	10	6.0%
Help with investment requirements	5	3.0%
More diversity in story telling	5	3.0%

Engage with governments for action against piracy	4	2.4%
Make it attractive to invest/film in UK film	4	2.4%
Internet distribution	3	1.8%
Government to support training/internship initiatives	3	1.8%
Government to draw on the expertise of academics who are experts on emerging markets - to share knowledge and ideas	2	1.2%
Government to offer tax breaks	2	1.2%
Total	**167**	**100.0%**

The most frequent suggestions for engaging with emerging markets were:

- Additional points of engagement and trade shows (18%).
- Co-pro treaties and assisting international initiatives (16.2%).
- Promoting partnerships (12%).
- Incentives and delegations (9%).

Table 50: What are the minimum requirements for the publicly funded UK film presence at key international markets and/or festivals?

Description	Frequency	Percent
UK pavilion at key events showcasing UK talent and space for sales discussions	26	19.5%
Other	26	19.5%
Support for British filmmakers at key events	17	12.8%
UK film to be presented in one place at festivals	14	10.5%
Essential to send a few key people for networking purposes	12	9.0%
Exhibit activities of British film industry and services we offer for co-production purposes	9	6.8%
Creation of distinct events	7	5.3%
Attendance at markets/festivals should be product specific	7	5.3%
Publicly funded bodies need to be seen as part of the industry	3	2.3%
No attendance required	3	2.3%
British Council stand to encourage co-productions and talent promotion	3	2.3%

British Council model of paying for travel on offer of accommodation from festival	2	1.5%
Limit attendance to where delegates from other countries attend	2	1.5%
Creative England to be present at key international markets	2	1.5%
Total	**133**	**100.0%**

The most frequent suggestions for the publicly funded UK presence at international markets/festivals were:

- UK pavilion at key events (19.5%).
- Support for UK filmmakers at key events (12.8%).
- UK film to be presented in one place at festivals (10.5%).
- Send a few key people for networking purposes (9%).

Table 51: How can Government strengthen inward investment?

Description	Frequency	Percent
Tax incentives	37	27.4%
Raising/maintaining standards of UK skills base	24	17.8%
Other	26	19.3%
Promotion of location "UK"	13	9.6%
Focused talent development strategy	12	8.9%
Promotion of creative industries as an investment for the future of the UK	7	5.2%
Partnerships	5	3.7%
Establish longer term investment over chasing tax credit rebate	3	2.2%
Pool people who work on bringing in inward investment	3	2.2%
MEDIA program, allowing another form of financing	3	2.2%
Concentrate support at the early stages of pre-production	2	1.5%

Total	**135**	**100.0%**

The most frequent suggestions for the ways Government can strengthen inward investment were:

- Tax incentives (27.4%).
- Raising/maintaining standards of the UK skills base (17.8%).
- Promotion of location "UK" (9.6%).
- Focused talent development strategy (8.9%).

10. Talent development

Table 52: Do you think enough is being done to find and nurture exceptional filmmaking talent amongst children and young people, compared to other art forms (for example, dance, music or theatre)?

Response	Frequency	Percent
Yes	35	21.1%
No	98	59.0%
Don't know	33	19.9%
Total	**166**	**100.0%**

A majority (59%) felt that more could be done to find and nurture exceptional filmmaking talent among children and young people.

Table 53: What more could be done to nurture talent?

Description	Frequency	Percent
Invest in practical filmmaking e.g. First/2ND Light	38	17.4%
More interventions (training, networking events, mentors)	19	8.7%
Schemes to integrate new talent into work/paid work placements/Apprenticeships/Bursaries	18	8.3%
School/summer school projects	17	7.8%
Develop rounded knowledge about film (history)	17	7.8%
Funding of film interventions at similar levels to other art forms	16	7.3%
Film education integrated across the curriculum/Formal film qualification (GCSE)	15	6.9%
Better industry links with HE and support for art colleges and film schools	14	6.4%
Support independent training schemes that encourage diverse and talented young people	13	6.0%
Ensure experienced quality providers	12	5.5%
Teacher training to reach all young people	10	4.6%

More emphasis on the market place/business/careers	9	4.1%
Show and celebrate the work of talented people – e.g. competitions	7	3.2%
Nothing more should be done; plenty of activity already	7	3.2%
More access to basic filmmaking technology	3	1.4%
Consider age diversity/ what about older people	3	1.4%
Total	**218**	**100.0%**

The top additional ideas for nurturing talent were:

- Invest in practical filmmaking e.g. First/Second Light (17.4%).
- More interventions (training, networking, mentors) (8.7%).
- Work placements/apprenticeships/bursaries (8.3%).
- School/summer projects (7.8%).
- Develop a rounded knowledge about film history (7.8%).

Table 54: How can we ensure that talented individuals work together across sectors?

Description	**Frequency**	**Percent**
Change teaching/training to focus on the 'team' not just individual	20	21.5%
Funding of trans/cross media projects and centres	19	20.4%
Cross industry events/networking/on-line to share experience/learn	13	14.0%
Where there is a business need/shared goals this naturally happens	11	11.8%
Support for specific initiatives (Triangle/2nd Light/Clore/CrossOver Lab)	9	9.7%
Not a priority/disagree with statement	9	9.7%
Training for filmmakers with mentors/teachers from other sectors	8	8.6%
BFI and Ace collaboration	3	3.2%
Job Swaps with people from wider sectors	1	1.1%
Total	**93**	**100.0%**

The most frequent suggestions for encouraging talented individuals to work together across sectors were:

- Change teaching/training to focus on the team (21.5%).
- Fund trans/cross media projects and centres (20.4%).
- Cross industry events and networking (14%).
- Support initiatives such as Triangle/Second Light/Clore/CrossOver lab etc (9.7%).

A minority of responses to the question (9.7%) disagreed with the proposition and a further 11.8% felt that it happened naturally.

Table 55: What role, if any, is there for public funding to facilitate talented individuals working together across sectors?

Description	**Frequency**	**Percent**
Incentives and fund cross-sectoral projects	16	18.2%
Funding necessary to sustain centres of excellence across the UK	14	15.9%
Funding necessary for training and skills development	13	14.8%
Not a priority/ None required	10	11.4%
Delivering networking events and information exchange	8	9.1%
Review of education and training to encourage cross sectoral integration	8	9.1%
Funding for talent incubators and R&D.	7	8.0%
Don't Know	6	6.8%
Funding education initiatives such as film camps	3	3.4%
Strategic collaboration between ACE and BFI	3	3.4%
Total	**88**	**100.0%**

The most popular suggestions for public funding to facilitate talented individuals to work across sectors were:

- Incentives and cross-sectoral projects (18.2%).
- Centres of excellence (15.9%).
- Training and skills development (11.4%).

A minority (11.4%) felt that no such funding was required.

Table 56: There is a view that UK talent has historically drained away to Hollywood following initial success. Do you think this is true?

Response	Frequency	Percent
Yes	113	70.6%
No	29	18.1%
Don't know	18	11.3%
Total	**160**	**100.0%**

A large majority (70.7%) of respondents felt that UK talent tends to drain away to Hollywood following initial success.

Table 57: What do you think is the main reason for the drain?

Description	Frequency	Percent
Hollywood offers a sustainable industry/regular work	48	37.2%
Hollywood can pay higher rates of pay	41	31.8%
Hollywood offers the chance to make films with higher production values	22	17.1%
Better weather	7	5.4%
Shared language	6	4.7%
Hollywood has a support network for professionals	5	3.9%
Total	**129**	**100.0%**

The top reasons given for the talent drain to Hollywood were:

- More regular work (37.2%).
- Higher rates of pay (31.8%).
- The chance to make films with higher production values (17.1%).

Table 58: How would you propose to address the talent drain to Hollywood?

Description	Frequency	Percent
Invest in a sustainable (x-media) industry for continuity of work	39	38.6%
Invest to make better films/attractive to audiences	20	19.8%

This is not a problem but a strength/opportunity as the talent returns	15	14.9%
Ensure UK pay rates are competitive	10	9.9%
Link up and work more with Hollywood	8	7.9%
Develop support networks for professionals	5	5.0%
Retain profits in the UK	3	3.0%
Exhibition quotas	1	1.0%
Total	**101**	**100.0%**

The most frequent suggestions for addressing the talent drain were:

- More investment in a sustainable UK industry (cross media) (38.6%).
- Invest to make films better/more attractive to audiences (19.8%).
- Ensure UK pay rates are competitive (9.9%).

A minority (14.9%) felt the talent drain was not a problem as the talent eventually returns.

Table 59: How can our film schools best prepare for the challenges and opportunities of the digital age?

Description	Frequency	Percent
Digital technology/age to be given greater emphasis	35	22.3%
Inform students about the whole of the industry e.g. writing; business; audiences	27	17.2%
Need top quality industry tutors and practitioners with recent experience	25	15.9%
Invest in facilities and ensure access to relevant up to date equipment	21	13.4%
Focus on experimentation; cross-sectoral collaboration and multiplatform storytelling	13	8.3%
Courses to be reviewed to ensure validity and industry relevance	11	7.0%
Invest in excellence across film schools/courses and students	9	5.7%
Emphasis on practical production	8	5.1%
Focus on technical excellence	4	2.5%

Film schools need to place emphasis on core film making skills which will always be relevant	2	1.3%
Recruit a diverse student base through offering bursaries	2	1.3%
Total	**157**	**100.0%**

Top ways for UK film schools to prepare for the digital age were:

- Place more emphasis on digital technology/age (22.3%).
- Inform students about the whole of the industry (17.2%).
- Top quality, experienced teachers (15.9%).
- Ensure facilities and equipment are up to date (13.4%).

Table 60: How can Government and industry ensure that talent being developed in the UK truly represents the diverse population of the country?

Description	Frequency	Percent
Focus on ensuring all young people have the opportunity to experience film making and know their options	24	16.7%
Structures in place to support talent fairly, regardless of background	18	12.5%
Funding and support for widening participation initiatives	18	12.5%
Not a priority/Industry respects all talent	18	12.5%
Student bursaries for those with talent	12	8.3%
Support paid internships and apprenticeships	12	8.3%
Better industry connections to all (regional) film schools and centres	9	6.3%
Profiling and showcasing of diverse talent	7	4.9%
Local schemes where technology is available to all	6	4.2%
Encourage genuine diversity in commissioners and funding and support organisations	5	3.5%
Support for a broad range of film schools/courses	5	3.5%
Need to see diverse talent making feature films	4	2.8%
Access to mentors for less privileged talent	3	2.1%
More funding available for shorts and low-budget projects/schemes	3	2.1%
Total	**144**	**100.0%**

Diverse talent can best be supported by:

- Equality of access to filmmaking opportunities (16.7%).
- Structures in place to support talent fairly, regardless of background (12.5%).
- Funding and support for wider participation (12.5%).
- Student bursaries for those with talent (8.3%).

A minority (12.5%) thought this was not a priority and that industry respects all talents.

Table 61: How can Government best support and strengthen the current UK skills strategies for film?

Description	Frequency	Percent
Support Skillset effectively; and listen to Skillset	24	22.6%
Ensure there is a training infrastructure by funding and promoting it	15	14.2%
Greater integration of HE/CPD and industry	12	11.3%
Invest in high level professional short courses	7	6.6%
Having a vision that's future proof	6	5.7%
Create conditions for film to be made and appreciated	6	5.7%
Understand the impact of film education on children and have a strategy to develop it	6	5.7%
Reinvigorate HE/Film Schools and training providers to support film cultural education	5	4.7%
Encourage respect for technical grades	5	4.7%
Make use of evaluation of programmes to ensure legacy	5	4.7%
Stop supporting Skillset	4	3.8%
By ensuring UK wide reach	4	3.8%
Funding for training organisations to buy New Technology equipment	4	3.8%
Support specialist talent by limiting low skilled migrant workers	2	1.9%
Fund agencies to share information and working in partnership to support emerging talent	1	0.9%
Total	**106**	**100.0%**

Respondents felt that Government could strengthen skills strategies by:

- Supporting Skillset effectively (22.6%).
- Funding and promoting a training infrastructure (14.2%).

- Greater integration of HE/CPD and industry (11.3%).
- Invest in professional short courses (6.6%).

11. Audience development, film education and heritage

Table 62: What is the role of Government in enabling the continuing development of film culture in the UK?

Description	Frequency	Percent
Support and encourage film literacy/education initiatives across the UK.	46	16.7%
Protect film heritage across the UK	35	12.7%
Protector/Guardian - Provide support advocacy and investment for film culture	29	10.5%
Enable audiences to access high quality film culture provision no matter where based	29	10.5%
Funding	28	10.2%
Support for film studies (formal)	23	8.4%
Fund and support cultural cinemas and film festivals	20	7.3%
Support British talent and film production	19	6.9%
Support the BFI (financially) and ensure that it's fit for purpose to support the sector	18	6.5%
Support distribution of British/cultural films	9	3.3%
Investment in HE, focus on humanities and research	8	2.9%
Ensure that Broadcasters make a wide range/choice of films available	7	2.5%
Ensure that more films are made/available for children	4	1.5%
Total	**275**	**100.0%**

The most popular suggestions for the role of Government in developing film culture in the UK were:

- Film literacy/education initiatives across the UK (16.7%).
- Protect film heritage across the UK (12.7%).
- A protector/guardian role (10.5%).
- Enable audiences to access to high quality film culture across the UK (10.5%).
- Funding (10.2%).

Table 63: What are the barriers to attracting new and wider audiences to a much broader range of historical and contemporary film?

Description	Frequency	Percent
Education/critical understanding suffers because film not part of the national curriculum/ Teachers not being experienced enough	46	19.9%
Awareness due to lack of publicity/marketing drive of Hollywood and multiplex	42	18.2%
Access to venues/community cinema	34	14.7%
Availability - Distribution agreements with cinemas favours 'popular' product; need cinemas to show a wider range of films	26	11.3%
Lack of funding for audience development - archive/specialist screenings/festivals	18	7.8%
Admission prices are too high and need to be more realistic to attract people	16	6.9%
Lack of Broadcaster engagement	15	6.5%
Lack of on-line platform showing varied product	13	5.6%
Arthouse/Independent cinemas need to be more accessible (welcoming/price)	10	4.3%
Awareness, perceived quality and appeal of British films	8	3.5%
Lack of diversity in the industry	3	1.3%
Total	**231**	**100.0%**

The main barriers to attracting new and wider audiences to a much broader range of historical and contemporary film were seen to be:

- Film is not part of the National Curriculum and teachers are not experienced enough (19.9%).
- Dominance of Hollywood (18.2%).
- Insufficient access to venues/community cinema (14.7%).
- Lack of availability – distribution agreements with cinemas favour 'popular product' (11.3%).

Table 64: Should funding and support be provided to address these barriers?

Description	Frequency	Percent
Yes	121	58.2%
Fund education and learning to address barriers	21	10.1%
Support needed for core organisations and venues	19	9.1%
Maybe/Partly	11	5.3%
Fund new ways and innovative ways to attract audience through marketing and social media	11	5.3%
No	6	2.9%
Encourage TV to promote a more balanced film culture	6	2.9%
Film education needs to be fully on Government agenda	5	2.4%
Online central exhibition Hub for niche films	4	1.9%
Only for strategic interventions	4	1.9%
Total	**208**	**100.0%**

A majority of respondents to the question (58.2%) favoured funding/support to address the barriers identified in Table 63. The most popular measures were:

- Funding for education (10.1%).
- Support for core organisations and venues (9.1%).
- Marketing and social media (5.3%).

Table 65: What should the role of film education be for different audiences at different stages of their lives?

Description	Frequency	Percent
Engage, excite and inspire whatever the age	45	29.2%
Secondary School – formal qualifications	19	12.3%
Primary School – Visual Literacy	17	11.0%
Young people and children are key/critical/important	15	9.7%
Lifelong Learning – via film societies and indy cinemas	13	8.4%
Primary School – Learning About the world	11	7.1%
Primary School – Learning About Creativity	9	5.8%
HE + Research – Knowledge of film culture	9	5.8%
Take C+YP to cinemas/ensure they see films at different stages	8	5.2%
Don’t know	7	4.5%
Accessibility	1	0.6%
Total	**154**	**100.0%**

The most popular roles for film education were:

- Engage, excite and inspire whatever the age (29.2%).
- Secondary school – formal qualifications (12.3%).
- Primary school – visual literacy (11%) and learning about the world (7.1%).
- Focus on young people (9.7%).
- Adults – lifelong learning via film societies and independent cinemas (8.4%).

Table 66: What measures, if any, would be appropriate to ensure the continued development of film knowledge and learning across all education sectors?

Description	Frequency	Percent
Film education in school curriculum/invest in school based film learning	36	22.1%
Funding of cinemas/festivals/archives to support education/schools	27	16.6%
Training for teachers	18	11.0%
Further development of strategic/national film education programmes	17	10.4%
Engagement with academics and film studies at HE level	16	9.8%
Contextualisation of films and resources available for teachers	12	7.4%
Joined up strategy and facilitators at national /local level	12	7.4%
Informal learning for young people outside of school	7	4.3%
Further education courses linked to film providers	6	3.7%
More access to wide range of film on-line and on Television	5	3.1%
More support for BFFS and Film Societies	4	2.5%
None – not needed	3	1.8%
Total	**163**	**100.0%**

The most frequently mentioned measures to ensure development of film knowledge across education sectors were:

- Film education in the National Curriculum and investment in school based film learning (22.1%).
- Funding of cinemas/festivals/archives to support education/schools (16.6%).
- Training for teachers (11%).
- Further development of strategic/national film education programmes (10.4%).

Table 67: Is there is enough available film material that speaks to people from diverse communities, and to children and young people?

Description	**Frequency**	**Percent**
No	49	30.1%
Available but not visible/accessible	39	23.9%
Yes	26	16.0%
Not for young people, although there is in rest of Europe	19	11.7%
Need initiatives to support a wider selection of British/world cinema for young people	18	11.0%
Don't know	7	4.3%
Need to support teachers and parents to find/know what is available	5	3.1%
Total	**163**	**100.0%**

A majority of responses felt that either there was not enough film material for diverse communities, children and young people (30.1%) or that such material was not visible or accessible (23.9%).

16% thought there was enough material available.

Table 68: What should be the TV broadcasters' role in developing audiences for film culture in the UK?

Description	Frequency	Percent
Film programming to show a wider range including independent/British/foreign language films	47	28.3%
General agreement that there is a role	45	27.1%
Programmes that look at film culture/history/world cinema	29	17.5%
Programmes about making films	14	8.4%
Screening more films at reasonable times	10	6.0%
Archive initiatives	8	4.8%
Programming special curated seasons of films	7	4.2%
Contextualisation with interviews from filmmakers etc	6	3.6%
Total	**166**	**100.0%**

The majority of respondents to the question felt that there is a role for the broadcasters in developing audiences for film culture in the UK. The most frequently mentioned roles were:

- Wider film programming including independent, British and foreign language films (28.3%).
- Programmes that look at film culture/history/world cinema (17.5%).
- Programmes about making films (8.4%).

Table 69: What role could emerging and social media play in developing further opportunities for learning and audience development?

Description	Frequency	Percent
Learning Opportunities/film education	33	27.3%
Engagement with audience	32	26.4%
Marketing of content	22	18.2%
Peer to Peer networks	7	5.8%
Forums and discussion groups	7	5.8%
Co-creation of content	7	5.8%
Integration of film funding and distribution	6	5.0%
Connections and access to film industry professionals	5	4.1%
Enable audience research	2	1.7%
Total	**121**	**100.0%**

The three most popular suggestions for emerging and social media were:

- Learning opportunities/film education (27.3%).
- Engagement with audience (26.4%).
- Marketing of content (18.2%).

Table 70: What interventions (eg public/ private partnerships) are needed to make the UK's film heritage more easily accessible by the widest audiences?

Description	Frequency	Percent
Increase digitisation/ICT/online resource	40	17.6%
Archive/film heritage; funding including regional archives	38	16.7%
Accessibility - free viewings/ affordable/subsidies – including classics and archives	23	10.1%
BFI – schools/local/higher education	20	8.8%
Financial support/funding bodies	16	7.0%
HE education courses and research	16	7.0%
Copyright issues/access rights/IPR	14	6.2%
Private sector expertise	12	5.3%
Partnerships – Govt./cinema/Broadcasters/DVD	12	5.3%
Film education programme	8	3.5%
Structured system; co-ordination and review	7	3.1%
Promotion/Distribution	6	2.6%
Social enterprise	4	1.8%
Film Societies	4	1.8%
Increased funding for the third sector	4	1.8%
Touring programmes	2	0.9%
Training	1	0.4%
Total	**227**	**100.0%**

To make the UK's film heritage more easily accessible, the most popular interventions were:

- Increased digitisation for online access (17.6%).
- Increased funding for archives (16.7%).
- Make material available free or at affordable prices (10.1%).
- BFI – schools/local/higher education (8.8%).

Table 71: Do you think the intellectual property regime needs to be changed to provide better access to the UK's rich screen heritage?

Response	Frequency	Percent
Yes	83	51.2%
No	16	9.9%
Don't know	63	38.9%
Total	**162**	**100.0%**

A small majority of respondents (51.2%) felt there should be change to the intellectual property regime to provide better access to the UK's screen heritage. There was a large number (38.9%) of 'don't knows'.

Table 72: Why do you think that? (Answer to Table 71)

Description	Frequency	Percent
Because our IP laws are out of date especially for a digital age.	28	30.1%
Currently there's too much of our film heritage unavailable	26	28.0%
Needs to change/be free for educational use	13	14.0%
People need to be paid for their creativity	11	11.8%
The high cost of licenses limits screenings (risky for small societies/venues)	5	5.4%
Orphan works problem needs to be sorted	4	4.3%
If public money is paying to store and restore – then the work should be available to the public	4	4.3%
IP rights should be limited to those still alive	2	2.2%
Total	**93**	**100.0%**

The top reasons for wanting changes to the IP laws were:

- Our IP laws are out of date for the digital age (30.1%).
- Too much of our film heritage is unavailable (28%).
- Access to heritage should be free for educational use (14%).

A minority (11.8%) thought it was a higher priority that people should be paid for their creativity.

Table 73: Do you think Film should be included in the National Curriculum?

Response	Frequency	Percent
Yes	130	76.5%
No	22	12.9%
Don't know	18	10.6%
Total	**170**	**100.0%**

The idea of including film in the National Curriculum was very popular (76.5%) among respondents to the question.

Table 74: Why do you think that? (Answer to Table 73)

Description	Frequency	Percent
Film should be recognized as a subject in itself/art form	57	37.3%
Film is an effective tool across the curriculum	47	30.7%
Cultural importance and heritage	31	20.3%
Film is not as important as other subjects	10	6.5%
It's key to developing audiences	6	3.9%
Resources are focused on National Curriculum	2	1.3%
Total	**153**	**100.0%**

Inclusion of film in the National Curriculum was felt to be important for three main reasons:

- Film should be recognised as a subject in itself (37.3%).
- Film is an effective tool across the curriculum (30.7%).
- Cultural importance and heritage (20.3%).

A small minority (6.5%) felt that film is not as important as other subjects.

Table 75: Do you think there are issues in the teaching of film across the Further Education and Higher Education landscape that need to be addressed by the film policy review?

Response	Frequency	Percent
Yes	89	53.9%
No	12	7.3%
Don't know	64	38.8%
Total	**165**	**100.0%**

A majority (53.9%) felt there are issues in FE/HE teaching of film that need to be addressed by the Film Policy Review.

Table 76: Why do you think that? (Answer to Table 75)

Description	Frequency	Percent
FE + HE to be partners in ensuring opportunities to study and work in the film industry	35	36.1%
There needs to be a review of the quality and relevance of teaching/courses/schools	21	21.6%
Film courses need to focus on more practical work	10	10.3%
There needs to be acknowledgement of the difference between film education/studies and film making skills and vocational training courses.	10	10.3%
They are key to development and access to resources for teaching	7	7.2%
There are too many people studying film	5	5.2%
The perception of film studies in the popular press needs to be changed	4	4.1%
Young people need to have a robust film education pre-HE	3	3.1%
Other	2	2.0%
Total	**97**	**100.0%**

The main reasons for wanting FE/HE film teaching issues to be addressed were:

- FE/HE need to be partners in ensuring opportunities to study/work in film (36.1%).
- The quality and relevance of film teaching needs to be reviewed (21.6%).
- Film courses need to be more focused on practical work (10.3%).
- Film making skills and film education need to be more distinct (10.3%).

12. Innovation and future proofing

Table 77: What in your view are the main obstacles to change in the British film industry?

Description	Frequency	Percent
Traditional conservatism - UK film stuck in their ways	32	16.8%
Other	22	11.5%
Cottage industry - power in the hands of a metrocentric few which stifles new talent	18	9.4%
Lack of necessary level of public funding to effect structural change	17	8.9%
US major's dominance of the local distribution market	14	7.3%
Lack of provision and up-to-date resources for professional training & education	12	6.3%
Risk-averse commissioning and financing	12	6.3%
Lack of audience-centric thinking	12	6.3%
Dominant exhibition sector	10	5.2%
Official and industry scepticism about the value of film as art or culture	9	4.7%
Lack of structure to succeed - short-term survival vs longer-term vision	9	4.7%
Lack of government support for innovation and new ideas	8	4.2%
Commercial imperative over content	6	3.1%
Dominance of political agenda over creative freedom	5	2.6%
High cost of UK professional low budget film including high crew costs	3	1.6%
Need to seek consensus on every matter	2	1.0%
Total	**191**	**100.0%**

The main obstacles to change were felt to be:

- Traditional conservatism (16.8%).

- Film is a cottage industry with too much power in the hands of the metrocentric few (9.4%).
- Public funding insufficient to effect structural change (8.9%).
- US studio dominance (7.3%).
- Insufficient training and education (6.3%).
- Risk-averse commissioning and financing (6.3%).
- Lack of audience-centric thinking (6.3%).

Table 78: What is the most important challenge arising from greater consumer choice created by new digital technologies?

Description	**Frequency**	**Percent**
Ensure digital distribution is in place	23	17.7%
Imperative to change the industry model to prevent destruction of revenue streams	20	15.4%
Create interest and access to film	15	11.5%
Other	13	10.0%
Simple payment methods for consumers to pay for content	11	8.5%
Realistic digital rights system	10	7.7%
Keep abreast of emerging opportunities	10	7.7%
Protecting the supremacy of cinema and as a communal experience	8	6.2%
Top rate product and story telling	7	5.4%
Concentrate on audience-centric models	6	4.6%
Educate about piracy and the damage it causes	3	2.3%
Make viewing material available cheaply	2	1.5%
BFI to create a platform for domestic film exhibition to ensure a wide audience	2	1.5%
Total	**130**	**100.0%**

The most important challenges arising from greater consumer choice arising from new technologies were:

- Ensuring digital distribution is in place (17.7%).
- Need for new model to prevent destruction of traditional revenue streams (15.4%).
- Create interest and access to film (11.5%).
- Simple payment methods for consumers to pay for content (8.5%).
- Realistic digital rights system (7.7%).

Table 79: What is the most important opportunity created by the emergence of digital technologies?

Description	Frequency	Percent
Digital film to build a wide range of audiences	28	17.5%
Other	21	13.1%
New distribution channels	20	12.5%
Cultural niche curation and distribution	18	11.3%
Create interest and access to film	18	11.3%
Digital distribution directly to viewers	18	11.3%
Faster access to and direct relationships with audiences	17	10.6%
Technology to help fund cheaper filmmaking	10	6.3%
Engagement with education, to encourage and inspire talent	3	1.9%
Realistic rights system	3	1.9%
Youth opportunities	2	1.3%
Support for film societies to keep social aspect of film-going alive	2	1.3%
Total	**160**	**100.0%**

The most important opportunities created by digital technologies were felt to be:

- Digital film to build a wide range of audiences (17.5%).
- New distribution channels (12.5%).
- Cultural niche curation and distribution (11.3%).
- Create interest and access to film (11.3%).
- Digital distribution directly to viewers (11.3%).
- Faster access to and direct relationship with audiences (10.6%).

Table 80: How, if at all, does the intellectual property regime need to be changed to support future growth and innovation in the British film industry?

Description	Frequency	Percent
Other	20	26.3%
To ensure growth, production companies need to hold rights which have long term value and active protection	12	15.8%
Laws required that cover fair access of audio/visual material	8	10.5%
Tighter legislation to clamp down on piracy	8	10.5%
System to pay for intellectual property in relation to usage	7	9.2%
Emulate music industry models but faster and with more flexibility	6	7.9%
Extend copyright into digital domain	5	6.6%
Current laws are reasonable but need more support, explanation and enforcement	4	5.3%
Use of different creative commons licences	2	2.6%
System to unlock archive rights that cannot be contacted or identified	2	2.6%
Fair dealing and right to quote	2	2.6%
Total	**76**	**100.0%**

The number of responses to this question was relatively low (76). The changes in the intellectual property regime most frequently sought were:

- Production companies need to hold rights (15.8%).
- Laws to cover fair access to audio-visual material (10.5%).
- Tighter legislation to clamp down on piracy (10.5%).

- System to pay for IP in relation to usage (9.2%).

As with other questions relating to IP, calls for a stronger crackdown on piracy were balanced by calls for new approaches to consumption of audio-visual material.

Table 81: What, if any, changes are needed in workforce skills to support future growth and innovation in the British film industry?

Description	Frequency	Percent
Other	16	15.7%
Digital aptitude, ability and training	13	12.7%
Enable the ability to build up a portfolio of skills to support experimentation and risk taking	12	11.8%
Better knowledge of sound practice	11	10.8%
Entrepreneurial skills & vision	10	9.8%
Apprenticeships in addition to or instead of University training	9	8.8%
State funded support for film skills from infant school to HE	8	7.8%
Producers to be trained in marketing, branding and audience development	5	4.9%
Recognition for achievement and rewards for success	4	3.9%
Financial help with on-going training as workforce mostly freelance and task-based	4	3.9%
Employ experienced practitioners for training	4	3.9%
Skills accreditation	3	2.9%
Accredited CPD provision inside and outside of film school & increasing partnership with broadcaster employers and craft guilds	3	2.9%
Total	**102**	**100.0%**

The most commonly sought skills for growth and innovation were:

- Digital aptitude, ability and training (12.7%).
- A portfolio of skills for experimentation and risk-taking (11.8%).
- Better knowledge of sound practice (10.8%).

- Entrepreneurial skills & vision (9.8%).

Table 82: What opportunities do you see arising for the British film industry from increasingly convergent digital devices, applications and content?

Description	Frequency	Percent
Ability to reach wider and more diverse audiences	28	22.6%
New business model - direct engagement with audiences	20	16.1%
Other	17	13.7%
Increase in potential revenues	14	11.3%
Audience responsiveness - getting content to audiences in the way they want it	12	9.7%
Increase in opportunities for independent filmmaking	8	6.5%
Opportunity for new products and services but also in cementing 'epic' cinema	8	6.5%
Opportunities for those who can expand on conventional cinematic storytelling techniques	6	4.8%
Greater consumer choice	5	4.0%
Lower production costs	3	2.4%
Opportunity for British film industry to be at the helm of Digital entertainment	3	2.4%
Total	**124**	**100.0%**

The main opportunities arising from convergent digital devices, applications and content were:

- Ability to reach wider and more diverse audiences (22.6%).
- New business model - direct engagement with audiences (16.1%).
- Increase in potential revenues (11.3%).
- Getting content to audiences in the way they want it (9.7%).

13. Finance Questions

Table 83: What are the barriers to investment in the creative content industries, and in particular film, in the UK?

Description	Frequency	Percent
Other	26	23.0%
Filmmaking is high risk	22	19.5%
Lack of profitability	21	18.6%
Difficult to get finance	20	17.7%
Tax credit not flexible/reliable enough	14	12.4%
Outdated business models	10	8.8%
Total	**113**	**100.0%**

The most frequently identified barriers to investment were:

- Filmmaking is high risk (19.5%).
- Lack of profitability (18.6%).
- Difficult to get finance (17.7%).

Table 84: What could we do to address the barriers to investment?

Description	Frequency	Percent
Retain/increase tax relief	26	28.3%
New business models (including a different distribution of earnings in the value chain)	23	25.0%
Other	23	25.0%
Improve quality/marketing of British films	13	14.1%
Improve training/education	7	7.6%
Total	**92**	**100.0%**

The most popular suggestions for addressing the barriers to investment were:

- Retain/increase the tax relief (28.3%).
- New business models, including a different distribution of earnings in the value chain (25%).
- Improved quality or marketing of British films (14.1%).

Table 85: How might Government incentivise the private sector to invest more in the British film industry?

Description	Frequency	Percent
Improve EIS and other tax relief	62	57.9%
Other	25	23.4%
Exhortation	7	6.5%
Give producers and investors a better share of the value chain	7	6.5%
Not necessary	6	5.6%
Total	**107**	**100.0%**

- Improved tax relief was the main government incentive sought (57.9%).
- A number of respondents specifically mentioned improvements to the EIS.

Table 86: How can Government and industry ensure that UK filmmakers benefit from the success of their films?

Description	Frequency	Percent
Bigger producer share in value chain	44	41.5%
Other	35	33.0%
Assistance for more exhibition/exposure of British films	17	16.0%
Box office based grant system	10	9.4%
Total	**106**	**100.0%**

Note: The 'other' category in this table is large but includes 'don't knows' and general requests for improved industry performance.

To ensure that UK filmmakers benefit from the success of their films, the most frequent suggestions were:

- Bigger producer share in the value chain (41.5%).
- Assistance for more exhibition/exposure of British films (16%).

Table 87: How do you think recouped funds from public investment might best be re-invested for the benefit of UK film?

Description	Frequency	Percent
Invest in new projects	36	36.7%
Invest in other things such as distribution, innovation, diversity and training	23	23.5%
Give to company whose project recouped	16	16.3%
Other	13	13.2%
Split between new projects and company whose project recouped	10	10.2%
Total	**98**	**100.0%**

The most popular suggestions for re-investment of recouped funds from public investment were:

- Invest in new projects (36.7%).
- Invest in other things such as distribution, innovation, diversity and training (23.5%).

A minority (16.3%) wanted recoupment given exclusively to the company whose project recouped.

Table 88: Should the process of public funding of British films be simplified?

Description	Frequency	Percent
Things should be generally simpler	29	32.6%
Other	21	23.6%
No, it’s fine as it is	14	15.7%
Simplify the legal process	13	14.6%
More transparency/fairness in selection process for public funding	12	13.5%
Total	**89**	**100.0%**

A majority of responses to the question thought the process of public funding of British films should:

- Generally be simpler (32.6%).
- Have a simpler legal process (14.6%).

- Be more transparent and/or fair (13.5%).

A minority (15.7%) thought the process fine as it is.

14. UK film in the Nations and Regions

Table 89: Do you think current Government policy in relation to film throughout the Nations, and Regions outside London, could be strengthened?

Response	Frequency	Percent
Yes	120	72.3%
No	13	7.8%
Don't know	33	19.9%
Total	**166**	**100.0%**

A large majority (72.3%) thought that Government policy in relation to film in the Nations and Regions outside London could be strengthened.

Table 90: Why do you think that? (Answer to Table 89)

Description	Frequency	Percent
Adequate support is needed UK wide/outside of London	35	17.2%
Film cultural activity/organisations and resources (audiences/learners) should be supported outside of London	30	14.7%
Metrocentric - quangos and key players are all London based	23	11.3%
Development of talent and industry skills outside of London/SE would strengthen the Industry	21	10.3%
Need to strengthen co-ordination and standards of the Nations/Regions	21	10.3%
Regions have lost out due to UKFC and RSA disbanding	20	9.8%
The UK population is not just based in London	12	5.9%
RSA overhead/costs outweighed the benefits	11	5.4%
Not clear what the policy is/whether there is a policy	11	5.4%
Need interesting stories/diversity of voices which come from everywhere	8	3.9%
Worry about the BFI dominance and ability to support regional activity	5	2.5%
Regional Broadcasters should give more support	3	1.5%
Good to make decisions with local area knowledge	3	1.5%
Ensure professional level production facilities available for low-budget work	1	0.5%
Total	**204**	**100.0%**

The main reasons for strengthening policy in relation to film in the Nations and Regions outside London were:

- Adequate support is needed outside London (17.2%).
- Film cultural activity, organisations and resources outside London should be supported (14.7%).
- The industry and official bodies are too London-based (11.3%).
- Talent and skills need to be developed outside London (10.3%).
- Coordination and standards need to be strengthened in the Nations and Regions (10.3%).