

Our ten-year strategy

# Screen Culture

# /2033

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# Screen culture – the meeting point of audio-visual storytelling and the digital revolution – has become the defining cultural phenomenon of our time, and is hugely influential in society.

As an expressive art, screen culture is still young, dynamic and expanding. The first moving images were created just over 100 years ago. Today, screen culture encompasses film, TV, digital media and video sharing, extended reality (XR) and video games. It has become the dominant means of communication and information for Gen Z and beyond, and a powerful means of expression, knowledge sharing and international soft power.

As an industry, the UK screen sector is a large and fast-growing employer that draws on a huge range of skills and disciplines to produce and distribute a vital form of entertainment and enrichment.

But despite its universal appeal and impact, screen culture is not afforded the same value in society as other cultural forms. It's not taught widely in schools, and doesn't benefit greatly from philanthropy at the same level as other artforms. Instead, the screen sector has been valued more as a creative industry than for its contribution to arts and culture.

At the BFI, we're here to promote and grow the full value of screen culture: to celebrate its positive impact on society; to transform access and ensure its continued economic growth; and to keep a record of the evolution and impact of our evolving artform in the BFI National Archive.

So, we've proudly claimed *Screen Culture* as the name of this new ten-year strategy that will steer us through this period of evolution and innovation and towards the BFI's centenary year in 2033.

## Opportunity

We're producing this strategy as societal, cultural and economic factors are having a profound impact on the screen sector, on the independent sector, and screen culture as a whole.

While there are evident challenges, this also presents us with opportunities.

For example, the UK's screen industries have more than doubled in size since we published our last strategy in 2017 and make a significant contribution to the UK economy. Production spend alone has risen from £2.2bn in 2017 to £5.6bn in 2021 and is projected to reach £7.3bn by 2025.<sup>1</sup> It's vital that we capitalise on this growth and ensure that the opportunities to work in the sector are available to everyone.

Meanwhile, convergence is building in the screen sector – in terms of skills, technology and consumption. This presents an opportunity to work in close collaboration with industry, government, screen agencies and experts to scale up the UK's creative and economic potential.

# Foreword

<sup>1</sup> ScreenSkills, Forecast of labour market shortages and training investment needs in film and HETV production Report, June 2022. Pg. 16.

We have seen how in the early stages of the pandemic, lockdowns accelerated the shift in how audiences consume film and TV. UK adults spent nearly a third of their waking hours watching TV and online video content in 2020. The streaming market continues to evolve, and we don't yet know the 'new normal' for theatrical exhibition and distribution.

Whilst signs of recovery are positive for major releases and repertory cinema, we need to anticipate new models for how screen culture is consumed. Our recent Economic Review of UK Independent Film revealed a domestic industry in flux.

We have confidence. The screen sector – and the BFI – were on the front foot during the early waves of the COVID-19 pandemic. Together, we were quick to respond to production challenges. We used the BFI's powerful policy and evidence resources to coordinate effective solutions. Working between government, the industry, national screen agencies and the wider cultural sector, we secured the Culture Recovery Fund for Independent Cinemas and the Film & TV Production Restart Scheme.

Our role in creating the right conditions for industrial growth and cultural development has never been more important. We need to be fit and ready to lead with confidence and stability.

## **A BFI fit for the future**

The pandemic has cast a long shadow on our own financial health as an organisation. Despite the incredible performance of our people and the support of government, our audiences, members, patrons, donors and sponsors, we have a significant gap in our projected finances. If we don't take the appropriate action now, we will have a growing financial challenge for years to come. We receive 2.7% of the National Lottery's income, but the size of the overall National Lottery pot has fallen and we have to do more with less.

Much of our cultural activity and our work for industry is funded through continued grant-in-aid support from the UK Government's Department for Digital, Culture, Media and Sport. However, we rely on a variety of income streams to deliver the full breadth of our charitable mission – as governed by our Royal Charter. The fundraising landscape is challenging, and both our physical and digital estates need investment. To deliver on our vision from a place of stability, we'll need to grow the income that we generate ourselves. We must also consider how the industry can better support our cultural work and the services we provide to the screen sector.

We feel the varying patterns in audience behaviour as a cinema and a streamer. We operate five screens – from our 30-seat Studio to the biggest IMAX screen in the UK. We've seen a strong demand for BFI Player, with double the number of subscribers since 2019. Similarly, our Britain on Film screen heritage has had 90 million views via our digital channels.

Digital access to our programmes – and our digital revenues – are critical. But they need high levels of sustained investment to meet the raised expectations of more demanding online audiences.

So, to realise our vision and fulfil our mission, we know we must evolve into a digital-first organisation. The potential to deliver more of our work digitally presents us with a huge and transformative cultural opportunity. We can build a more diverse BFI than ever, have broader reach and engagement with audiences, and unlock a major source of future income.

This means building a more innovative organisation. One that is representative of and relevant to the public, is a credible lead body for supporting the industry's development and growth, and advances our commitments to net zero. To stay at the forefront of screen culture, we'll embrace change and evolve as a resilient, sustainable, digital-first and diverse organisation with a plurality of voices.

You'll see this approach woven throughout our strategy.

**Ben Roberts, Chief Executive**

Over one hundred years since the first moving pictures, screen culture – the meeting of audio-visual storytelling and the digital revolution – has a major influence on society. It impacts on creativity, and how we share information and understand the world around us.

We believe it can be a powerful force for good. We want to see it thrive, and for it to have a profound and positive impact on all our lives.

*Screen Culture 2033* sets out how we will advance our knowledge, collections, programmes, National

Lottery funding and leadership, to build a diverse UK screen culture that benefits all of society and contributes to a prosperous economy.

We have **six major ambitions**. By 2033, we will:

**A** Transform our relationship with public audiences, and be widely known as an open house for the discovery and enjoyment of film and the moving image<sup>2</sup>.

**B** Achieve wide appreciation of the cultural, social and economic value of the full breadth of screen storytelling, including video games.

**C** Establish the BFI National Archive as the most open moving image collection in the world.

**D** Radically reform all BFI services by making them easy to use and widely available online, reaching more people and delivering more of our cultural programme digitally.

**E** Reframe the educational value of screen culture with policymakers, educators and parents, and support a skilled and sustainable workforce that reflects the UK population.

**F** Drive growth and international success across the screen sector, and address market failures through our funding schemes, policy and evidence.

To deliver all of this, we will become a more financially resilient and commercial organisation, with a culture of ambitious, agile and data driven entrepreneurship.

# Introduction

<sup>2</sup> Moving image includes all audio visual content including film, television, video games, immersive, interactive and new forms of storytelling as well as online video platforms.





# Part I Setting the scene

*In Pursuit of  
Repetitive Beats*  
(Lead Artist:  
Darren Emerson)  
Supported by the  
BFI Film Fund



# 1. About the BFI

The BFI was founded in 1933 and is governed by our Royal Charter. Over the past 90 years we have grown in our role as a cultural charity, a distributor of National Lottery funds and as the UK Government's lead body for film and the moving image.

We are a community of over 700 people who are passionate and knowledgeable about film, television and the moving image. And we are committed to ensuring a positive and accessible screen culture for all.

Our people work in one of the following areas:

- **Public Programmes & Audiences**
- **Knowledge & Collections**
- **Corporate & Industry Affairs**
- **Technology & Digital Transformation**
- **Fundraising & Enterprise**
- **Finance, People & Business Operations**
- **Chief Executive's Office**

## **We currently operate five sites:**

**BFI Southbank:** Originally opened in 1957 as the UK's National Film Theatre, this is our main public venue. It hosts four cinema screens, the BFI Reuben Library, our Mediatheque, exhibition spaces, bars and restaurants.

**BFI IMAX:** Our iconic single-screen IMAX cinema contains the biggest screen in the UK at 20 by 26 metres. It is frequently one of the best-performing IMAX sites in the world.

## **BFI J Paul Getty Jnr Conservation Centre:**

The BFI National Archive's main 11-acre site, at Berkhamsted, Hertfordshire. It contains interconnected collections storage, laboratories and bespoke collections processing buildings.

**BFI Master Film Store:** Our 21-acre site in Warwickshire, near Gaydon, provides state-of-the-art storage facilities. It holds the national collection of film masters, as well as other key collections from our partners.

**BFI Stephen Street:** Our headquarters in central London since 1987, home to two viewing theatres and specialist research viewing facilities.

We actively recruit from across the UK and encourage our people to use any of our sites as creative places for collaboration, problem-solving and socialising. We believe everyone will choose the right environment and time for the work they do and when they need to do it.

As a registered charity, established by Royal Charter, we are governed by a Board of up to 15 Governors. They bring a range of business and creative insights, and contribute significant expertise from across the screen industries. They include representatives from Wales, Scotland and Northern Ireland.



BFI Film Academy,  
Bristol

**We want to create the conditions in which screen culture and the UK's screen industries can thrive – across the UK and around the world.**

# Our mission



## We do this by:

- **Growing and caring for the BFI National Archive**, the world's largest film and television archive.
- **Offering the widest range of UK and international screen culture to audiences** through our online and in-venue programmes and festivals.
- **Using our knowledge to educate and deepen public appreciation** and understanding of film, TV and the moving image.
- **Supporting creativity** and actively seeking out the next generation of UK creators.
- **Working with the Government and industry** to ensure the continued growth of the UK's screen industries.

We are committed to promoting appreciation of the widest possible range of UK and world cinema. We also establish, care for and develop accessible collections of moving image heritage.

We do this in collaboration with a range of partner organisations, screen agencies, local and devolved governments across the UK – working together to make sure BFI support is tailored to differing needs and political contexts of each of the devolved nations.

However, as content production and distribution globalise, UK-made work has become less prominent. That makes our role in encouraging and reflecting the UK's diversity of cultures, languages, landscapes and perspectives more crucial than ever.

Through this strategy, we will amplify our focus on UK work. We will celebrate the full breadth of the UK's screen culture past and present, and promote it internationally.

This focus will be evident in our cultural and educational programmes, our distribution and publishing, our heritage and contemporary acquisitions, and our support for the UK independent film sector. It will affect every part of how we champion UK independent creators through our funding, policy drives and international promotion.

Our work abroad is more critical than ever. We must ensure there is a healthy and harmonious domestic production sector and an open door to international collaboration. We must grow a strong global marketplace for audiences who enjoy the quality and diversity of UK screen culture. And we must promote robust knowledge exchanges with our international peers to explore the future of the moving image.

We will achieve much of this work in collaboration and partnership with other organisations around the world. The BFI is a founding member of the **International Federation of Film Archives (FIAPF)** and **European Film Agency Directors (EFAD)**. By working hand-in-hand with the British Council, the Department for International Trade and other agencies, we currently deliver a range of vital soft-power-focused activity which boost the UK's cultural influence overseas. The BFI London Film Festival, for example, is a highlight of the international calendar and a key convening moment for creative talent and international business.

Finally, we will ensure that our thought leadership continues to be internationally recognised and opens up outstanding opportunities for collaboration. This applies across our publications, research, film productions, festivals and public programmes, heritage and educational initiatives, and diversity and inclusion programmes.

**At the BFI we are driven  
by a collective purpose:**

**We believe society needs stories.  
Film, television and the moving  
image help us to connect and  
understand each other better.  
We share the stories of yesterday,  
search for the stories of today, and  
shape the stories of tomorrow.**

*Mogul Moghli*  
(dir. Bassam Tariq)  
Distributed by  
the BFI

**This purpose is built on:**

**Storytelling**

The moving image brings stories to life, helping us all see the world through different lenses – so that we can understand each other better.

**Choice**

We stand for choice and difference. We champion over 100 years of the moving image in all its forms to create the greatest possible choice, access and opportunity for all.

**Opportunity**

We work to keep screen culture vibrant. We drive the industry forward, inspire the artistic evolution of future talent, and expand the possibilities of storytelling.

**Discovery**

We help people get more out of their screen culture. We place it at the heart of our cultural lives for all to discover and delight in, and use it to teach us about the past, present and future.

**Connection**

We use the transformative power of screen culture for social good. We tell stories and start conversations that bring people and communities closer together.

# Our purpose



**We will transform access to our programmes, screen culture and jobs across the whole of the UK.**

**We will do this by focusing on the diversity of our audiences, expanding our work to fully embrace television and video games, reframing the public's relationship with the BFI's collections, investing in the growth of our digital platforms and working with the industry to deliver long-term strategies for education, skills and net zero.**

Our strategy builds upon this vision through our six ambitions.

# Our vision to 2033

*Medusa Deluxe*  
(dir. Thomas Hardiman)  
Supported by the  
BFI Film Fund





## 2. The underlying principles of our strategy

Our work will be underpinned by three cross-cutting principles: a commitment to equity, diversity and inclusion; ensuring that our work reaches across the nations and regions of the UK so that everyone can benefit and by reducing our environmental impact and leading the sector towards net zero.

We will measure the success of our work against these three principles.

### Equity, diversity and inclusion

**We want everyone to develop a meaningful relationship with film and the moving image, regardless of their background or circumstances. Representation, accessibility and accountability lie at the centre of this strategy.**

We believe in long-term interventions which are measurable, iterative and adaptable. By working in partnership with communities and marginalised groups, we can draw on their lived experience to deliver our work authentically and accessibly.

*Pretty Red Dress*  
(dir. Dionne Edwards)  
Supported by the  
BFI Film Fund



## Our priorities are:

■ **Race equality** Long-standing discrimination across the screen sectors has created barriers for Black, and ethnically diverse people. Sadly, this includes the experiences of colleagues at the BFI. By working with experts to embed anti-racism and accountability into our processes and provide training for our people, we hope to create long-term, sustained interventions. These will enable us to dismantle racism and champion best practice for the wider sector.

■ **Disability equality** Prioritising disability and d/Deaf equality is a key but historically underdeveloped area of inclusion work. There remains a significant gap in understanding ableism and its negative impacts on representation. We have adopted the social model of disability including neurodivergence and relevant mental health diagnoses in our definition. We also partner with our Disability Screen Advisory Group to influence and shape our activity. We are led by the disabled community's mantra, 'Nothing about us without us'.

■ **Promoting a culture of access and accessibility** We want everyone to feel included in the activity of the BFI, and that means looking at access and accessibility in the broadest sense. We consider physical access to our buildings, online access to our digital programmes and ensuring our work is felt in every region and nation of the UK crucial. We are committed to improving access to our digital platform and add closed captioning to all digital video services. And we will continue to remove the financial barriers that limit anyone's ability to participate.

■ **Developing an inclusive industry** Our long-term inclusion efforts are led by our Diversity Standards and our Guidance and Principles to prevent Bullying, Harassment and Racism, and we are committed to the development and expansion of these policies.

We ask all our partners to engage with us in these areas, and we are committed to reporting against our Inclusion Targets ([Page 41](#)), using self-declared data from our people and those we fund. This will continue to help us to identify specific areas of focus for under-representation where progress in our industry has been particularly slow, such as ethnicity and disability. While we are also aware of the progress still needed in achieving gender equality, and ensuring all members of the LGBTQIA+ community are supported, and represented, Intersectionality is key, recognising that personal identities are individual, intertwined and complex.

## UK-wide

Everyone across the four nations of the UK should be able to experience and create the widest range of moving image storytelling. Economic growth and access to jobs should be felt UK-wide.

Screen culture has a huge role to play in shaping our collective identity as a country. It can help us explore the rich diversity of UK life across every nation and region.

But we know that the cultural and economic opportunities on offer are unbalanced. The range of exhibitors and stories on screen varies considerably between different areas of the UK, and people can face barriers to access both in terms of proximity to venues and digital connectivity.

We also know that screen businesses and infrastructure are concentrated within London and the South East of England. That makes it harder for others to access education, skills and training opportunities. It is also harder to pursue careers in the sector, establish sustainable businesses and develop local networks.

As a result, the full economic benefit of screen sector activity is felt unequally across the UK. We must address this imbalance of opportunity. In the course of the next 10 years, we will make sure that all our funded activity works together to provide UK-wide opportunities to experience, create and work in film, TV and the moving image. We will support the Government's **levelling-up agenda**. And we will coordinate closely with screen agencies in regions and devolved nations to align our funding strategies.

Within our organisation we are also committed to looking at opportunities to grow our people presence across the UK. To support this, we are adapting our recruitment practices to actively seek out and promote a UK-wide recruitment approach. This is already bearing fruit with a number of senior appointments made outside the South East. Similarly, our **Screen Archive of the Future** research will widen public access to the BFI National Archive outside of London and the South East.



## Environmental sustainability and meeting net zero

The world faces a climate and ecological emergency, and the screen sectors have an important role to play in addressing this. If we are to reduce our environmental impact and support wider industry efforts to get to net zero, we must enact systemic changes.

This means changes across all our activities, our buildings, behaviour, National Lottery funding portfolio, and our programming decisions.

By engaging with themes of environmental sustainability and the climate crisis, stories on screen can make a difference. They can help impress the importance of reducing humanity's impact on the planet and they can show the many realistic ways in which the public and society can contribute. Storytelling can unite people from all backgrounds around this common cause. We will use our festivals, programme and BFI Player to help creators promote greater awareness of our climate emergency.

Environmental sustainability is a strategic principle in our National Lottery Strategy. We will ensure BFI funding decisions consider ecological impact and that we help recipients improve. Recognising the variety of beneficiaries, we will fund specialist expertise to develop ambitious and achievable plans for a net zero sector. We will also deliver robust carbon accounting of our progress. We will fund research that informs a green transition for the screen sectors, supporting approaches that deliver net benefit to the environment.

It is imperative that we also commit to a step change in how we work as an organisation. In 2023, we will set out a roadmap for reducing our absolute greenhouse gas emissions and establish the internal resource necessary to reach net zero ahead of the **2050 government deadline**. This roadmap will help us determine how we embed sustainability into estate upgrades and operational planning. We will prioritise those areas of greatest impact, and find the most sustainable option for the future of the National Archive. As we transition to being a digital-first organisation, it will help us embed low-carbon practices throughout our decision-making.

We will also focus on sustainability during procurement, paying particular attention to our supply chain. We will not merely mitigate our impact but will also create positive change through biodiversity improvement across our estate. We will work with our neighbours on the South Bank, our friends in the environment and screen sectors, including the **National Museum Directors' Council** and **BAFTA albert**. Sharing knowledge, best practice and new ways of working to minimise our carbon footprint and environmental impact.

Director Aleem Khan and  
actress Joanna Scanlan  
on the set of *After Love*  
Supported by the  
BFI Film Fund and  
distributed by the BFI



# Part II Our ambitions

## A. Diversifying our audience

By 2033, we will have transformed our relationship with the public, and be widely known as an open house for the discovery and enjoyment of film and the moving image.

**We want to welcome new and occasional audiences into a year-round and lifelong relationship with screen culture and the BFI. We want to encourage audiences to experience a thrilling sense of discovery of new and historic voices, technological advancements and different forms of screen storytelling.**

**We will take a more egalitarian approach, making our online and physical spaces welcoming and inclusive for all. We will ensure anyone can afford to seek out something different.**

### Why now?

In recent years we have worked hard to broaden our programme and build a growing online audience.

- BFI Player has doubled the number of subscribers in recent years, and enables people across the UK to experience our programmes.
- The BFI London Film Festival welcomes close to 290,000 people each year. They enjoy a vibrant range of fiction, documentary, experimental digital art, horror, drama, thrillers, science fiction, immersive XR and VR, television and games.

- Over 25,000 people came to BFI Flare in 2022, the biggest LGBTQIA+ festival in Europe – the majority of whom were new to the festival.

- Several partnership-led programming initiatives have widened the focus of our programming. This includes strands like *BUG*, *African Odysseys*, *Woman with a Movie Camera*, and *MK3D*; and partnerships with *The London Indian Film Festival*, *Underwire*, *Film Africa*, *Refugee Week*, *Queer East* and *The Chinese Visual Festival*.

- The BFI IMAX attracts an audience with an appetite for the mainstream and big-screen experience to the BFI. By bringing its programming in-house we have an opportunity to be more expansive and playful with the programme mix. We will supplement its programme with a mix of Bollywood nights, cult classics, fan favourites and more.

- The BFI Film Audience Network (FAN) boasts a membership of over 1,500 UK independent cinemas, film societies and community venues. This grew considerably through its role in the administration of the UK Government's Culture Recovery Fund for Independent Cinemas in England. We therefore have an opportunity to build on this legacy and support culturally diverse programming in more UK venues.

- We have a steady number of loyal members and subscribers: our BFI Members, *Sight and Sound* subscribers, 25 & Under audience, and our Champions and Patrons.

We want these audiences to develop a wider, year-round relationship with the BFI, and to see us as a gateway to discovering a wider screen culture.

We are still perceived by many as a home for cineastes, students and academics of film. Diversifying our audiences will mean challenging and expanding the traditional canon of film and TV. Western film history has privileged and prioritised particular voices, placing the achievements of some on a pedestal.

These voices have tended to be white and male and clearly represent neither the true past nor present of cinema and screen culture. We aim to provide a platform for the filmmakers – and the genres – that connect with a variety of audiences and tastes. We want everyone to feel welcome and represented.



## How we'll do it

Over the next 10 years, we want to fully open up the BFI and celebrate the true diversity of creators and content across screen culture. We will forge a wider relationship with the UK public, and grow our year-round audience.

### Our goals are:

- To grow and diversify our community of lifelong audiences and members across our cultural programmes. Our audience will be more reflective of the UK, guided by our Inclusion Targets, and everyone will feel welcome.
- To give a platform to a broader range of editorial voices and perspectives, working as enablers, not gatekeepers. We will involve more people – including audiences – in our writing, presenting and programming, and we will expand our community of host partners.
- To balance cultural and commercial success and achieve robust results in both.
- To realise a fully multi-platform programme that links different areas of the BFI and is available across the UK.

- To deepen our relationship with partner organisations across the UK – including the BFI Film Audience Network. We will ensure our programmes and seasons are widely available.
- To maintain funding for the BFI London Film Festival and support its continued growth as one of the world's leading festivals for film, TV and the moving image. This includes through the continued expansion of audience access across the UK.

### In the first three years, we will:

- 1. Introduce a new and flexible membership strategy** that offers year-round benefits to audiences across the UK. This will include tiered access to all our programmes and platforms including *Sight and Sound*, BFI Southbank, BFI Player and BFI IMAX, with the possibility to include partners UK-wide.
- 2. Challenge and expand the established 'canon' of filmmakers** so that all our audiences can see themselves, their aspirations and their histories reflected on screen. This also means celebrating the full breadth of cinema and its audiences. From international classics to Bollywood films to mainstream Hollywood, we will ensure a wider approach to form and format.
- 3. Place a greater emphasis on contemporary and classic British storytelling.** We will engage audiences at home and abroad with the full breadth of cultural diversity and narratives in UK society. This will help us understand ourselves and each other better.
- 4. Work with the UK Government to establish a sustainable funding model for the BFI London Film Festival** to ensure its continued success and delivery across the UK.

## B. Embracing a wider screen culture

By 2033, we will achieve wide appreciation of the cultural, social and economic value of the full breadth of screen storytelling, including video games.

**We want to build on our international reputation as an expert and advocate of film and the moving image, and fuel an entirely new narrative around the cultural significance of video games amongst the public and government.**

**We will use the first three years of our strategy to build a clear case for the role of government and industry support for the video games sector. We will take what we have learnt from this period to build a roadmap for how we will support video games and interactive media over the remainder of the strategy.**

### Why now?

Screen culture is evolving rapidly with the growth of video games, the use of social media, XR and other interactive media. People the world over use screens to capture our imaginations in vastly differing ways: from work in more established formats to interactive work. Creators make and share content on phones, bring new life to old material through creative reuse and attract huge audiences as they do it.

This will only accelerate over the next decade as the ways in which society creates and consumes traditional and new media converge. Predicted technology-enabled evolutions such as the metaverse and decentralised web offer huge potential for the sector.

These transformations will challenge business and distribution models and create demand for skills. These intersect virtual production, VFX, video games and new forms of creative expression.

It is core to our mission that we continue to evolve our own cultural, educational, research, policy and funding support for the making, collection, preservation and exhibition of new forms.

Over the past five years we have begun to expand our work to incorporate video games and emerging media.

- Our BFI Film Fund has supported several immersive projects with National Lottery money, including the critically acclaimed *Notes on Blindness*; *Child of Empire*, an animated VR docudrama experience which immerses viewers in the 1947 Partition of India and Pakistan; and *In Pursuit of Repetitive Beats*, a euphoric interactive VR adventure presented as part of Coventry UK City of Culture.
- A new strand of programming as part of the BFI London Film Festival – LFF Expanded showcases a variety of forms of visual storytelling, presenting artists' work from across different media. We curated a new physical exhibition space and a free, globally accessible virtual exhibition space, *The Expanse*.
- We are piloting a year-round 'Expanded' programme at BFI Southbank. We recently supported a UK-wide tour of *Laika*, Asif Kapadia's VR animation which was originally developed by the BFI and StoryFutures Academy for the 2021 edition of the LFF.
- Our industry support for video games and new forms has primarily been through the work of the BFI Certification Unit. This administers the cultural test for the Video Games Tax Relief. We also run video games days throughout the year to share knowledge and best practice and build networks.
- The UK Global Screen Fund, funded by the UK Government's Department for Digital, Culture, Media and Sport, offers targeted support for screen companies, including those specialising in video games and emerging media forms, to help drive international business growth and IP development.

Games trade bodies are represented in the BFI's Screen Sector Taskforce and our Research Advisory Group. The economic impact of the Video Games Tax Relief is featured in our Screen Business report, which demonstrated the increasing importance of video games to the UK economy. The games industry's total gross value added (GVA) grew by 81% between 2016 and 2019, reaching £5.2bn and supported over 72,000 jobs across the UK.

As an independent research organisation, the BFI benefits from strong partnerships with two AHRC-funded cluster projects, StoryFutures and XR Stories.

It is now time to explore where it makes sense to do more. We are mindful the constraints of our current funding model mean that in the first years of the strategy, our ability to offer significant financial support to the sector will be limited.

Our initial focus will be on working with organisations engaged in the sector including Ukie, TIGA, Immerse UK, UK Research & Innovation (UKRI), the Arts & Humanities Research Council (AHRC), UK Games Fund, BGI and the National Video Games Museum. We will build partnerships and share knowledge, being careful to make sure we add value and expertise where it is most needed.

## How we'll do it

Over the next 10 years, we want to establish the BFI as a valued partner, a leading advocate and a supporter of video games, interactive and immersive media.

## Our goals are:

- To enhance our reputation as a leading advocate for all forms of screen storytelling at home and abroad.
- To fuel an entirely new narrative around the cultural significance of video games – particularly amongst the public and government.
- To work with government and partners and secure the necessary level of funding to support emerging media.
- To identify sustainable models for the creation of new work and grow a thriving grassroots sector of UK-based games companies.

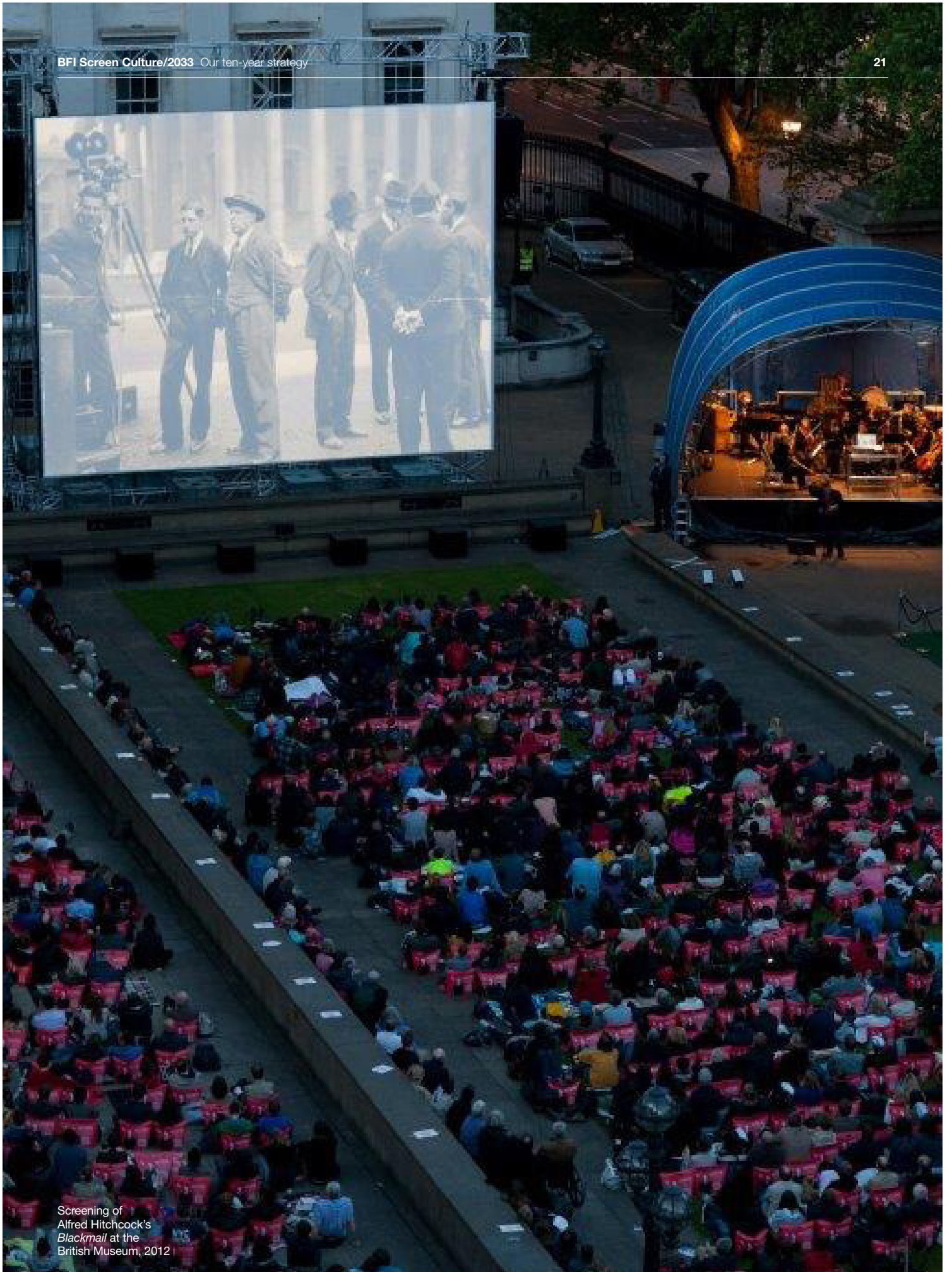
To increase the range of new and emerging forms at our festivals, venues, in *Sight and Sound*, on BFI Player and via funded UK partners.

To create the necessary partnerships and infrastructure to care for and preserve video games and new forms for future generations, supported by appropriate funding.

## In the first three years, we will:

- 1. Build the case for funding, and for our long-term role.** We will embark on sector research, engagement and knowledge exchange (including on the preservation of video games and digital media). We will also develop an understanding of the social, economic and cultural value of video games and new forms that is underpinned by evidence.
- 2. Undertake research on skills needs and opportunities** within virtual production, VFX, video games, animation and new forms. We will ensure our workforce is equipped with the right creative and technical skills for the UK to retain its position as a global leader in screen content.
- 3. Share best practice in equity, diversity and inclusion and sustainability policy.** This will help us set standards for inclusion and measuring environmental impact.
- 4. Expand several National Lottery funding programmes.** We will build on our current support for the sector via the BFI Certification Unit and the UK Global Screen Fund.
- 5. Build on the success of LFF Expanded** and our virtual exhibition space, The Expanse. We will offer year-round programming at BFI Southbank, online and across the UK.





Screening of  
Alfred Hitchcock's  
*Blackmail* at the  
British Museum, 2012

## C. Reframing the public's relationship with the nation's screen heritage

By 2033, we will have established the BFI National Archive as the most open moving image collection in the world.

**We want to unlock the value and expertise of one of the world's greatest collections of screen heritage and find new ways to communicate our experts' knowledge, skills and passion for the moving image.**

**We will transform public access and education through the *Screen Archive of the Future*. We will safeguard the future record of our artform and fulfil our global leadership potential. We will invest in a digital-ready and diverse UK-wide screen heritage workforce.**

### Why now?

The BFI National Archive brings together the national collections of film and television. It encompasses a multimedia library, paper and moving image format collections, and already stands as one of the world's greatest collections of its kind.

It is powered by our industry-leading practice in digital and analogue preservation and film restoration. It is also fuelled by our work with the international community, especially via FIAF and FIAT/IFTA, and our decades of curatorial and librarianship expertise.

For the best part of 90 years, we have recorded the evolution of the moving image. Our multimedia collections span celluloid formats, tape, digital media, paper collections, photography and more.

In recent years, the BFI National Archive has developed new ways of making screen heritage available online. This allows audiences to experience

the vitality of the moving image. Most notably, Britain on Film has reached a landmark 90m views, and our new BFI Replay service is available in public libraries UK-wide. We have consistently sought out the research and investment needed to gather partners around these national projects.

However, we are yet to realise the true potential of our collections in terms of public engagement and education. This especially applies to people who cannot visit our sites in London and the South East.

For example, over 70,000 titles in our mediatheque are only accessible to in-person visitors at BFI Southbank and 5,000 BFI Replay titles are only available on site in libraries. The bulk of titles across our Britain on Film and BFI Player platforms are currently restricted to viewing from the UK and Ireland only.

We have strived to develop these platforms and products. However, securing the essential ongoing resource to operate and iterate them into the future is proving a challenge. We do not have platforms available for teachers and educators, lifelong learners or young people and children in education. That obstructs access to both our cultural programmes and the national collections. This is despite the depth and breadth of the collections' content on the history and impact of film and the moving image. Such restricted exposure limits our range and depth of connection with a wider audience. The national story told in the collections cannot enter a UK-wide conversation when there are such limited access routes. We believe these stories cannot remain untold; they need to be shared and seen.

As the moving image evolves, new challenges have become clear: from copyright legislation that lags behind the digital era to the explosion in online content creation. Ever-changing, platforms and formats create barriers to collecting UK works for the national collection.

Finally, training and retaining a digital-ready screen heritage workforce is our latest challenge. Today, there is nowhere in the UK to qualify in film preservation, and no certified route for learning film archiving or projection skills. We are on the brink of a specialist workforce shortage that threatens to leave a blank space in the record of the moving image.

It's more important than ever that we make opportunities for everyone to use, work with, learn from and enjoy our national screen heritage. This means working UK-wide and with others to build and deliver the next national strategy for moving image collections.

## How we'll do it

Over the next 10 years, we will increase access to the BFI National Archive. We will usher in a new age of education and engagement with the nation's screen heritage.

### Our goals are:

- To create engaging new ways for a broader audience to interact with our collections. This will include a new public-facing experience for both digital and in-person visitors.
- To raise the public profile of the BFI National Archive as a vital part of UK screen culture, and to improve the UK-wide use of our materials by educators.
- To ensure that the diversity and breadth of contemporary screen works are being collected, preserved and made accessible in the national collection. This includes working with government, rightsholders and engaging industry to find solutions for collecting and improving public access, such as consideration of a legal deposit system.
- To secure a solid and broader revenue base for the BFI National Archive. This includes making it more self-sufficient and encouraging support from the wider industry.
- To co-create a national screen heritage strategy to safeguard and unlock the screen heritage collections around the UK, alongside our nationwide partner archives. This will feature equity, diversity and inclusion and environmental sustainability at its heart.

### In the first three years, we will:

- 1. Establish the business case for the Screen Archive of the Future**, a major new engagement project to greatly enhance opportunities for the public outside of London and the South East. It will promote the public enjoyment, education, creative reuse and research of our collections, including our extensive paper-based materials.
- 2. Identify funding opportunities and develop academic partnerships.** We will use our IRO status to conduct new research with the collections and consolidate our reputation for partnership and innovation in digital preservation.
- 3. Agree a talent, skills and training plan** to support and diversify vital heritage skills. This will include conservation, restoration and projection.
- 4. Evolve and consolidate the digital platforms and products we use for collections discovery and interpretation.** This includes the in-person mediatheque experience, our BFI Replay platform in UK public libraries, Britain on Film and collections search interfaces.



## D. Growing our digital platforms

**By 2033, we will have radically reformed all BFI services by making them easy to use and widely available online, reaching more people and delivering more of our cultural programme digitally.**

**We want to expand our digital reach and improve access so that everyone can benefit from everything the BFI does – no matter where they live. We also need to future-proof our organisation, embracing technological change and diversifying our income to sustain our charitable activities.**

**We will develop and launch BFI+, our next-generation streaming service, enabling UK audiences beyond our Southbank catchment to discover, discuss and delve into the best of UK and world screen culture, past and present, with us and each other.**

### Why now?

We live in an increasingly digital world. Digital is the default way most people access information and services. Brands and institutions are judged against ever-increasing expectations for transparency, convenience and service quality. Users are empowered to create as well as consume, and online word of mouth is often decisive in defining success.

In our sector, the uptake in streaming services continues to soar. Emerging technologies are enabling new, decentralised business models and entire new forms for screen stories.

With expectations, culture and business models all evolving rapidly in step with technology, both the industry we support and the services we deliver will continuously face new challenges and opportunities across the life of this strategy.

It's vital that the BFI embraces digital, data and technology. It will allow us to meet our audiences where they are now and be fully prepared for an evolving, unknowable future.

Through digital, we can:

- Make it easy for even more people to access our established services, from screenings at BFI Southbank to *Sight and Sound* and our funding and education opportunities.
- Scale beyond the physical limitations of geography, schedule and capacity so that everyone can access the BFI's cultural programme – wherever they are and whenever they want.
- Change the relationship with our users, bringing our industry and fans together online, and using rapid insights and feedback to get closer to our users' needs.

We have already made big digital strides. Most of our users today connect with us online. Our websites serve more than 7.5m UK and 16m worldwide sessions per year. BFI Player and the BFI YouTube channel receive over 10m annual streaming views. Our social channels boast around 2m followers.

However, we also have some basics to fix. Navigating our cinema listings, buying tickets, donating or applying for funding can currently be a frustrating and disjointed experience. We need a new strategic approach, moving away from discrete projects that create unconnected products with limited ongoing development post-launch, and investing instead in long-lasting and joined-up digital services that continuously improve over time.

BFI Player represents one of our largest transformational opportunities. There is evident demand in the streaming market for our hand-picked library of independent and heritage film, much of which isn't available elsewhere. BFI Player currently reaches 10-times the audience of our Southbank screenings, furthering our nationwide reach, and its subscriber base has doubled in recent years. With a relatively low rate of churn, this steady growth now produces a modest net income that helps relieve financial pressure on the BFI.

There is huge potential to accelerate BFI Player's growth, increasing our share of a total addressable market at least another 10-times the size of our current audience. To do that, we need to address technical limitations and make our direct-to-consumer service easy to find and use through living room devices. We also need to bring in more of what makes the BFI special and grow our collection of compelling content. Thirdly, we need to develop further strategic partnerships for new acquisitions and to reach new audiences.

The BFI also holds a treasure trove of material about screen culture that isn't yet available online. This includes our vast BFI National Archive collections, thousands of hours of recordings from Southbank events and nearly a century's writings about the cinema. Subject to rights, digitising and sharing this material can greatly enrich our cultural offer.

We can also take more advantage of our editorial capability across written, audio and video forms, plus the passion and knowledge of our programmers, curators, members and guest talent. Taken together, this will allow us to provide contextual editorial content that renders our video-on-demand proposition utterly unique.

Growing and improving the usability of our digital services will augment and support our physical offer – not replace it. Doing so will benefit our box office sales and magazine subscriptions and improve access to all of our services BFI-wide, from education to funding. It will enhance our marketing data to help support national independent cinema partnerships and cross-promotions. Finally, we fervently believe that our at-home and in-venue platforms can provide excellent distinct experiences, and exceptional combined ones, by playing to their individual strengths under a unified BFI programme.

Over the course of this strategy, we will seek opportunities to innovate. In partnership with sponsors, we will explore how newer technologies can help us deliver our ambitions.

## How we'll do it

We will continue the evolution of our digital offer to scale our reach and impact, open up the BFI, and future-proof our organisation.

### Our goals are:

- To develop BFI+, our next-generation streaming service that will enable users to enjoy the best of UK and world screen culture on demand.
- To grow registered user numbers, active usage and satisfaction across our digital offer. We will enact iterative and evidence-led approaches to product, content, production, promotion and partnerships.
- To grow and mature our digital, data and technology delivery capability so we can continuously respond to change. This includes fully adopting the best practices set out by the Cabinet Office (GDS) and transitioning from one-off project funding to continuous product development.
- To augment our cultural output with unique content not previously available online. This includes nearly a century of writing, recorded talks and events, and (rights allowing) paper artefacts in the BFI National Archive special collections.
- To make digital the default means of finding and interacting with us across our services – from booking a ticket to applying for funding. We will ensure all interactions with the BFI are connected, convenient, accessible, reliable and attractive to users.
- To ensure in-venue technology keeps pace with change. Equally, we will continue to sustain and strengthen our increasingly rare specialist support for analogue film projection for future generations.



Audience Members  
experiencing the Expanded  
strand VR exhibit at the  
BFI London Film Festival 2021

### In the first three years, we will:

- 1. Secure a significant one-off investment** to evolve BFI Player and relaunch it as BFI+. We will start by making it easy to access on major at-home devices.
- 2. Grow our capability and apply higher standards** for iterating our digital products and services. Priorities include improving the user experience of accessing funding, exploring the collections, seeing what's on and buying a cinema ticket.

- 3. Develop a flexible suite of connected digital platforms** that enable us to make decisions with data, join up the BFI experience for users, partner with others, and experiment and adapt quickly in response to digital disruption.

- 4. Transform and unite processes** for programming and distribution acquisitions, and production of 'extras' and editorial content. Together, this will deliver a strong and coherent cultural programme across our digital and theatrical platforms.



## E. Developing long-term strategies for education and skills

By 2033, we will have reframed the educational value of screen culture with policymakers, educators and parents, and supported a skilled and sustainable workforce that reflects the UK population.

**We want to give everyone the opportunity to build a lifelong relationship with the moving image as a form of expression and communication. For their enjoyment and well-being, and as a viable career.**

**We will make the case for screen culture to be taught as an essential part of the curriculum. We will work with the sector to remove barriers to access, improve career paths, and expand training opportunities UK-wide.**

### Education Why now?

Education is key to our goal of deepening the public's appreciation, understanding and enjoyment of screen culture.

The Government's *Opportunity For All* white paper (2022) pledged quality education as a key step towards good jobs and happy families. We have a crucial role to play. We will promote the importance of screen literacy and advocate for the teaching of film and moving image as an expressive art and career.

We will also support its use as an educational tool, and help equip educators to teach expertly and confidently. We believe that the moving image is an essential part of a broad and varied national curriculum – but its formal recognition in curricula across the UK is not consistent. We believe that educating young people about screen culture will help them both interpret the world around them and make informed choices regarding their further education and careers. The Government's upcoming Cultural Education Plan, due to be published in 2023, could be a first step in addressing this.

We welcome around 10,000 young people each year to BFI Southbank. They engage in education events that respond to the changing demands of the curriculum, including Film and Media, Modern Foreign Languages, Audience Theory and Representation. Whilst this direct delivery model is popular, it is centred around in-person learning at BFI Southbank. That means access has been limited to local schools or those who can afford to travel – primarily schools in the private sector.

Our digital strategy will be key to furnishing access to world-class learning materials. We want everyone of all ages to use them – including teachers, students and community educators. We have unrivalled assets that we will begin to unlock as part of our digital strategy. This includes many decades of programme notes, published articles, special collections, and thousands of hours of moving image.

We can also make better use of the unrivalled knowledge and experience held by our colleagues and networks of professionals. We will build on our partnership work, including with those we fund via BFI National Lottery programmes such as Into Film.

Alongside more formalised learning, we believe our cinemas are great places for everyone to discover something different. At BFI Southbank we run a highly popular reduced ticket price for young people aged 25 and under, and offer a reduced-price subscription on BFI Player.

These initiatives empower young people to engage with a broader range of screen culture. It inspires them to develop a more curious, risk-taking, and expansive approach, opening their eyes to diverse stories and new forms of creative expression. We can do more to help cinemas and venues across the UK widen access to their screenings.

Ultimately, we want people of all ages and backgrounds to realise the positive impact that consuming a more challenging, historic, and diverse screen culture can have in confronting prejudice. It can be hugely influential in growing human, social and cultural capital, and in contributing to health and well-being. Now is the time to redouble our commitment to lifelong learning through screen culture.

## How we'll do it

Over the next 10 years, we will work to improve the quality and availability of moving image education, and promote the positive benefits of a diverse screen culture.

### Our goals are:

- To make a compelling argument for screen culture to be reflected in the curriculum across the UK.
- To build a positive reputation for screen culture amongst educators and parents. We will champion its impact on learning, creativity, well-being and cohesion.
- To ensure teachers are equipped with the resources, confidence and skills to teach with film and the moving image across the UK.
- To increase awareness of educational programmes and the use of resources. This will include those linked to the BFI National Archive and our wider cultural programme. It will also feature training and talent development opportunities such as the BFI Film Academy.
- To ensure more members of the public access our lifelong learning programmes.
- To welcome more families, children and young people aged 25 and under visiting our venues and online platforms.

### In the first three years we will:

- 1. Publish a new education strategy** that will use commissioned research and existing data to build the case for film and the moving image to be considered an essential part of the curriculum.
- 2. Invest National Lottery funding to deliver learning and teaching resources.** These will be drawn from contemporary screen culture and screen heritage collections that will inspire and engage young people. We will also support teachers and community educators to confidently teach with and about the moving image.
- 3. Work with exhibition partners** to ensure that cultural cinemas across the UK are accessible, affordable and welcoming spaces for young people.
- 4. Partner with online video platforms** where audiences and creators socialise, learn, share and are discovered. We will expand the channels through which people can access learning.

## Skills

### Why now?

By the end of this strategy in 2033 many of today's primary school-aged children will be entering employment. Despite the prevalence of screens in daily life and the sector's growing economic and industrial strength, it isn't widely viewed as a viable career opportunity.

Of those surveyed within our Next Up consultation, only 24% believed work in the screen industries could be open to everyone. Similarly, over half of young people have never had relevant career advice.

This perceived non-viability of film careers significantly impacts the diversity of new joiners. Retention is another issue, with 65% of respondents to the Film and TV Charity's 2021 survey having considered leaving the industry in the preceding year due to mental health concerns.

However, film and HETV production alone requires around 20,770 new full-time recruits by 2025. This equates to an annual training bill of £104.4m a year. So, it's clear that an industry-wide effort is needed. We must work together to deliver the necessary skills, training and outreach; and to engender a greater focus on how to create healthy working practices.

In light of these significant challenges the Department for Digital, Culture, Media and Sport (DCMS) commissioned the BFI to undertake a skills review, focusing on scripted film and high-end television physical production. This report captures the key skills challenges facing production, highlights existing approaches and initiatives that could be expanded or learned from, and sets out recommended actions to help inform a future strategy.

The BFI is uniquely placed to coordinate industry action, develop policy and evidence, and drive-up workforce standards. We can play an important role in promoting screen literacy, interpretation and understanding. We can also support teachers to champion the burgeoning potential of screen careers.

Over the past decade, the BFI Film Academy has provided UK-wide vocational training opportunities for over 10,000 young people aged between 16 and 25. It has helped them take their very first steps towards a screen industry career. This is supported by our year-round programme of online and in-venue Film Academy skills events – including the BFI Future Film Festival, the UK's largest festival for young, emerging filmmakers. These programmes inspire and build industry knowledge for a further 15,000 young people annually.

Once in the industry, our BFI Diversity Standards and anti-bullying, anti-harassment and anti-racism guidance create safer, happier and more sustainable workplaces. Now is the time to build on this track record, and the insights we have gained in the BFI Skills Review for Film and High-End Television (HETV). We must support a more inclusive, harmonious and diverse industry.



## How we'll do it

We will create more training opportunities across the UK and work with government and industry to significantly expand awareness of careers and close the skills gap.

### Our goals are:

- To take an active role in shaping policy, make the case for greater investment in film and TV training, and produce data to better identify and address skills shortages.
- To drive a reduction in the skills gap and labour shortage with a highly skilled and diverse workforce. We will track this through improved data collection and analysis.
- To work with industry to deliver broader awareness of the wide variety of roles available in the screen sector.
- To increase industry investment and ownership of training and skills development and negotiate an industry commitment of 1% of overall production spend towards UK-wide skills development.
- To grow the number of people accessing careers information about the screen industries both online and in person, and to build recognition of the variety of screen career opportunities among parents and society at large.
- To drive improvements in the diversity of the workforce.
- To improve workforce retention by advocating for changes in working cultures and practices.

### In the first three years, we will:

- 1. Build regional partnerships in areas with ongoing production activity.** We will use expert local knowledge to develop skills clusters to better identify and address regional skills gaps. These will promote and facilitate new training and entry-level opportunities and share best practices that improve retention.
- 2. Build closer relationships between the education sector, industry and government** to inform curricula and build broader awareness of careers. We will also identify structured placements and maximise access to Government- and industry-funded training opportunities.
- 3. Focus on helping under-represented groups access and develop their careers** in the screen sectors. We will advocate for change, ensure positive working environments and fund targeted initiatives.
- 4. Inspire young people to pursue creative careers** through a network of willing advocates and role models, and by establishing a sustainable model for the BFI Film Academy programmes.



BFI Film Academy  
Craft Skills course,  
delivered by  
Screen Edinburgh

## **F. Growing the cultural and economic impact of the UK's screen industries**

**By 2033, we will have driven growth and international success across the screen sector, and addressed market failures through our funding schemes, policy and evidence.**

**We want to establish greater interconnectivity and collaboration within the UK's screen sector.**

**We will work with industry and policymakers in our role as the lead body for film and the moving image to advocate for a successful future for the sector. We will particularly focus on how to maximise the opportunities that lie ahead and how we can help minimise the challenges.**

### **Why now?**

The screen sectors make a significant contribution to the UK's economy and growth agenda, and they are evolving rapidly. Against this backdrop, we have an important role to play in helping tackle new challenges, seize opportunities, and sustain growth.

For example, the UK is facing a skills shortage, and diversity and inclusion remain a huge challenge. The independent sector is suffering from multiple market failures across development, production and distribution. Similarly, there is a lack of coordination towards achieving net zero. A legacy structure of patchwork public funding to deliver key industry support services has led to inequitable support for production across the nations and regions of the UK.

Committed leadership is needed to coordinate and address these issues.

Over the years, we have consistently invested in policy and research expertise to help address significant sector-wide challenges. This includes the work of the BFI-led Screen Sector Taskforce as a convenor and independent broker between industry and government.

The Taskforce effectively delivered the rapid and coordinated policy and evidence needed to restore the sector in the wake of the pandemic, leading to a series of vital support packages. These included the £500m government-backed Film and TV Production Restart Scheme and the inclusion of independent cinemas in the Culture Recovery Fund for Independent Cinemas.

We have a unique remit to champion and strengthen the cultural, social and economic impact of the sector – both domestically and internationally. In addition to our policy and research work, we fund a number of support services. These include the British Film Commission, regional production services and the BFI Certification Unit; all play a material role in both attracting inward investment to the country and supporting the development of production activity across all parts of the UK.

We now need to ensure that the funding and governance of infrastructure support for the screen sector delivers the greatest possible impact – for all nations and regions of the UK.

Our National Lottery funding is also vital to the cultural and economic success of our screen industries. It is a powerful tool for driving positive change and promoting equity, inclusion, and better working conditions.

The BFI invests a significant proportion of our 'good cause' funding each year into nurturing and developing new and emerging talent and creating great UK IP through the BFI Film Fund. We work with film organisations and leading cultural venues across the UK to provide professional development, networking, and short film and early feature development funding. This grassroots finance supports producers, writers and directors of all ages and is essential for the health of our sector.

With less available funding in our new National Lottery Strategy, we have honed our focus on areas of market failure and cultural need. We will deliver vital support for talent across the UK's independent sector, whilst also providing relevant and accessible skills development opportunities. Over the next three years we will need to develop a funding relationship with UK producers that ensures the widest and fairest access to support.



Over the next decade, we will need to partner closely with the sector and government in order to:

- ensure our funding and support is targeting the areas of greatest need.
- gather evidence and develop new policy.
- champion the importance of independent film.
- set high standards for equity, diversity and inclusion and getting to net zero.

## How we'll do it

Over the next 10 years, we want to establish greater interconnectivity and collaboration within the UK's screen sector. This will maximise our collective cultural and economic opportunities at a time of immense change.

### Our goals are:

- To deliver a sustainable independent film model and grow the sector, at home and abroad.
- To develop a stable long-term funding and governance model for the British Film Commission, production services, the UK Cannes Pavilion and the BFI Certification Unit. This will lead to more cohesive and appropriately funded delivery models that can best serve the needs of the sector across the UK.
- To build our in-house expertise in areas such as video games and sustainability.

- To continually advance our understanding of the cultural, social and economic impact of the full breadth of the screen industries through our policy and research work.
- To show measurable improvement in the industry-wide fulfilment of key goals. This includes equity, diversity and inclusion and environmental sustainability.
- Build new channels for disseminating our findings both domestically and internationally. This will consolidate the BFI's reputation as a knowledge hub and thought leader.
- To help the sector navigate an increasingly global market and ensure continued close collaboration with EU Member States and our European partners. We will grow the number of UK co-productions, and we must make sure that our content continues to be seen by international audiences to reduce reliance on UK-derived revenue.

### In the first three years, we will:

- 1. Work with industry and government to encourage better coordination and funding for skills development.** We will build on what we have learnt from our Film and HETV skills review to look at the future skills needs for video games, animation, virtual production and new forms in the first year of the strategy.
- 2. Agree new models for the UK's industry support services** in partnership with Government and the sector. This will include working with Film London\*, with respect to its current role housing the British Film Commission; we will also be reviewing regional production and location services, the funding of the UK Cannes Pavilion and the BFI Certification Unit.
- 3. Deliver the BFI's commitments made in response to recommendations from the Economic Review of UK Independent Film.** This details deep-set challenges, including developing a 'new deal' for filmmakers within our National Lottery funding plan.
- 4. Work with leading experts in the sector to establish new standards and practices.** This includes championing the use of the BFI Diversity Standards, and helping the industry meet net zero and other environmental goals.

\*In the first two years of the new strategy £175,000 GIA has been allocated to support core overheads at Film London for the British Film Commission whilst a new model for industry support services is agreed.

BFI IMAX



# Part III How we'll do it

# 3.1 Growing the BFI’s income and financial strength

We will be a financially resilient organisation, driving a commercial mindset that is agile, ambitious, opportunistic, entrepreneurial and data driven.

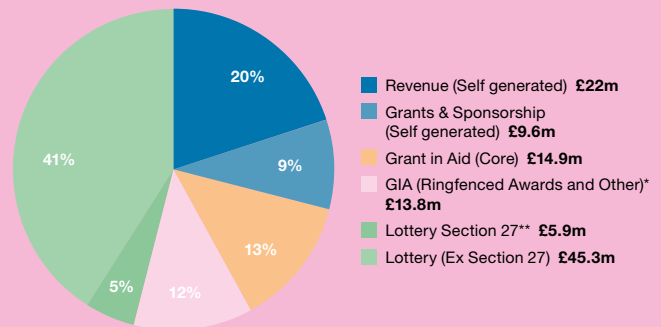
In the context of a challenging economic climate, pressure within public funding, and a broadening remit, we are targeting addressable income growth of 10% over the next three years, as part of our wider organisational review and transformation work.

This will allow us to:

- Deliver our charitable objectives from a position of baseline stability.
- Build financial resilience through the development of an appropriate level of reserves, allowing stability and greater risk-taking.
- Support the ambition of *Screen Culture 2033*.

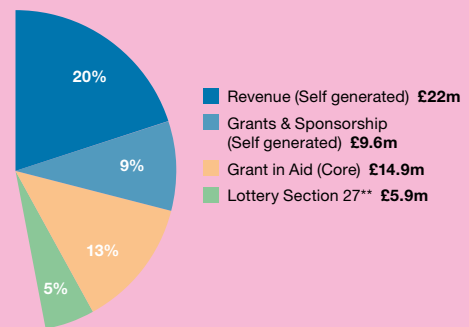
## How things stand: Our current funding model and its challenges

**Chart 1**  
BFI Total Income 2022–23 (Budget)



\*GIA (Ring-fenced Awards: Global Screen Fund, Northern Ireland Language Funds, Film Academies; Other: Film London/BFC)  
\*\*Lottery Section 27 – to support LFF & H22

**Chart 2**  
BFI Direct Delivery Activities





At present 25% of our total income (including National Lottery funding) is in the form of Grant in Aid (GIA) (see *Chart 1*), with 12% of this ring-fenced for awards which we manage and distribute on behalf of DCMS. The remaining 13% core GIA funding is how much we have available, alongside our self-generated revenues (29%) and Section 27 Lottery funding (5%), to deliver the wide breadth of activities and services we provide to the cultural and creative sectors (see *Chart 2*).

The considerable challenges within the public sector funding landscape have meant that our core GIA funding levels have not increased in line with inflation, resulting in us having to do more with less.

Alongside this real-terms reduction in our funding, we have also taken on additional responsibilities, such as those within the BFI Certification Unit – which now encompasses an even broader set of screen sector tax reliefs – our expanded policy and evidence work, and the growth in activity as we expand our remit to embrace broader screen.

As a result, we need a strategy focused on income growth to ensure we can continue to deliver our activities and services to the cultural and creative sector.

As a National Lottery distributor, we also receive and distribute a 2.7% share of the Lottery ‘good cause’ funding and retain a small percentage of this total allocation for our administrative overheads.

The wider economic challenges of inflationary pressures, changing consumer habits and post-pandemic market conditions all reaffirm our focus on the need to build on the work to date in developing our income streams, to improve our financial resilience and our ability to exploit opportunities and ultimately subsidise our cultural activity. This focus is essential to ensure we can realise the full range of our ambitions, as outlined within this strategy, and ensure we can continue to deliver to the sector and create value for both the BFI and our customers across our broadening remit.

We will focus on maximising commercial self-generated revenues and also look at income in its widest definition. This ranges from GIA, trust grants and philanthropy to partnerships, industry support and commercial exploitation. The identification of income growth areas at which to target viable business models over the next strategy period is a key priority.



BFI Southbank

## How we spend it

Our GIA funding is the bedrock of our charitable activities. The purpose of this funding is to support our cultural remit and to address market failure in the moving image sectors. We successfully use this funding to build additional revenues and fundraising incomes. And it helps further bolster our outputs and achievements against our and the government's goals and objectives.

Of the £14.9m of core GIA that goes towards running the BFI's operations (*Chart 2*):

- c.45% goes towards supporting the UK's National Film and Television Archive, incorporating the national film library. This is a world-leading archive in size, breadth and technical innovation.
- c.25% goes towards supporting BFI Southbank, a world-leading moving image venue that showcases UK and world screen culture and houses the public-facing BFI Reuben Library.
- c.15% goes towards supporting the wider distribution of the best of British and world film and television through various channels. These include VOD through BFI Player and YouTube, DVD, BluRay and theatrical distribution to cinemas around the UK and internationally.
- c.15% goes towards industry and policy support including certification for accessing the UK screen sector tax reliefs, evaluation and inclusion work.

Alongside our GIA and in order to support the BFI London Film Festival (LFF) and our Heritage 2022 project (H22) (5%) (*see Charts 1 and 2*), we also access a small allocation of National Lottery funding, using a technical mechanism called Section 27. This 5% allocation reflects a higher-than-normal funding requirement due to Covid-related delays with the H22 project.

Moving forward we may no longer be able to support the LFF through the Section 27 mechanism to the same level, which has created a funding challenge in that area. Our objective is to remove the current need for Lottery funding to support our core activity, in order to provide greater stability. Importantly this will also release this funding for external distribution through our National Lottery funding programmes.

## Focus areas for growth

Our focus will be to optimise our margins and, where appropriate, in a commercial context, seek to maximise market share. We will do this by simultaneously rationalising and building on our existing income streams using a 'commit, rework, stop' approach. We will also seek out new potential sources of revenue.

We will develop appropriate and sustainable business models to maximise, sustain and diversify our income growth across all of our income streams in response to changing markets and circumstances.

In seeking out new opportunities, we will play to our strengths, ensuring value creation for the BFI and for our customers. As an organisation, we have a highly skilled and experienced workforce, and this considerable strength will support how we identify, take forward and realise new opportunities, to their full potential.

### i. Funding for strategic projects

Our key strategic priorities give us the opportunity to create tailored projects with bespoke funding plans. These will allow us to pursue projects of strategic importance to the BFI and at the same time improve our financial resilience.

These could include:

- Digital transformation.
- Screen Archive of the Future.
- Education and skills.
- Expanding our remit to broader screen.
- Investment in our estates.

### ii. Assets

We will unlock the value of our assets, whilst recognising the need for targeted investment to realise long-term benefits:

- **Rights** – we will undertake a comprehensive review to understand the extent of our rights asset holdings and from this create a comprehensive rights strategy to optimise their management.

■ **BFI National Archive Collections** – we will acknowledge the value of our collections, recognise where the commercial opportunities exist, and work to exploit these both in the UK and internationally.

■ **Estates** – we will develop a comprehensive estates strategy to maximise return on our estates. We will optimise their use to serve the needs of the organisation, our audiences and visitors, and for income generation.

■ **Brand** – the BFI is a valuable brand recognised internationally as innovative and agenda-setting. We will reinforce our profile as a charity that has a transformational impact and drives nationwide change, and we will leverage its power and appeal for commercial benefit.

■ **Our people and knowledge** – our people are our greatest asset. We will ensure we understand our full range of strengths, skills and knowledge and harness these to further the ambitions of the organisation.

■ **Our digital products and user base** – we have an established and growing foothold in the streaming market with BFI Player, and over 16 million global website sessions a year. We recognise that there is significant potential to grow our overall reach and we will invest in this to further develop our provision.

■ **Our cultural programmes** – we are renowned for our cultural programmes including the BFI London Film Festival and BFI Flare. These continue to evolve and our ambition is to increase audience reach and relevance by curating world-class cultural programmes. Some of these will be commercially successful and will subsidise others; all of them will be important to our mission.

### iii. Fundraising and enterprise

Our new strategy, coupled with our brand and values, provides us with an opportunity to:

- Expand and diversify our philanthropic supporters and ladder of giving.
- Grow our corporate and business partnerships, including industry and technology partners.
- Express our impact to charitable trusts and foundations.
- Unlock more opportunities for a growing area of commercial ventures.

We will remain flexible and innovative to ensure we retain and diversify our business partners and donors in a challenging market. That means drawing on:

#### ■ **Support from our audiences and members**

We need to ensure high levels of awareness of our charitable work, educational programmes and sector leadership through our campaigns and messaging. This will help our audiences, members and visitors to understand the value of their contribution to our mission through buying a ticket, a membership or an item from our shop, and making charitable donations.

#### ■ **Support from screen talent**

Talent from across the industry is essential for raising awareness of and attracting interest in our work. We already work closely with many individuals who help us communicate the value of the BFI. We will grow the number of high-profile ambassadors who openly support our work, endorse it, and donate to major fundraising projects.

■ **Opportunities through new strategic projects** Through major new strategic projects, we expect to increase major gifts. We will also grow the value of our biennial fundraising gala, LUMINOUS.

■ **Building international support** We will build on our brand and reputation amongst filmmakers, studios and the wider film industry. This will grow our community of supporters internationally – with an initial focus on the US.

### iv. Audiences and commercial development

Self-generated revenues will continue to be of critical importance to the BFI. We will focus our energies on developing existing and new income streams across:

■ **Customer data** – to develop a more in-depth understanding of our customer base, we will invest in digital technology to better capture our customer data. This will help us devise more targeted, effective and efficient customer acquisition and retention strategies, supporting the transition of our customers' engagement from single to multiple interactions. We will aim to increase our supporter conversion rate by communicating the cultural value of the BFI and our need for public support.



■ **Audiences and memberships** – we will improve our customers’ digital experience, to grow our membership and develop and diversify our audiences. With the development of appropriate dynamic pricing strategies and a clear understanding of our USP, we will increase our reach and achieve greater access and improved conversion opportunities. Coupled with improved and targeted communication and marketing strategies, we will build lifelong relationships and grow customer engagement from casual to sustained, and from transactional to philanthropic.

■ **Online exhibition** – we will improve our offer, building on our USP to retain and grow our audience share in a saturated and competitive market. We will do this by continuing to invest in our online exhibition delivery on BFI+. We will identify growth areas both in the UK and abroad, exploring the viability of our international expansion and add-on services for specific markets.

■ **Acquisitions** – we will build on the success and learnings of the last five years and will investigate a new approach to acquisitions. This will be designed to unlock the potential for greater cross-platform programming and growing BFI+.

■ **Retail and merchandising** – we will review our physical and digital retail offers to ensure they meet customer expectations and demands. We will identify what is working well and what is not, and develop a greater understanding of customer trends, behaviours and buyer journeys. We will explore and develop new merchandising strategies, looking to other sectors for proven approaches and utilising our assets and knowledge of audiences, film culture and online marketplaces to create tailored and targeted merchandising.

## v. Government and industry

We will work closely with both government and the industry to ensure support for our existing and expanded remit as the sector’s needs develop.

### We will focus on:

■ **Government support for video games** – we will develop a greater understanding of the support required by the games sector. This will include for the collection, preservation and exhibition of video games. We will build the case for government and industry support in the first three years of the strategy.

■ **Government support for the BFI London Film Festival** – we will continue to work with government to develop a new funding model for the festival. That way, we can ensure its continued success and delivery in London and across the UK.

■ **Industry support** – in light of the ongoing pressure on public funding, we will work with industry to consider an appropriate level of support for the BFI. Doing so will ensure the ongoing delivery of our cultural activities (such as the BFI National Archive and the BFI London Film Festival) and industry support services (such as certification and our policy and evidence work).

### Our goals are:

■ To be financially resilient and build our strategic ambitions from a stable position by achieving at least 10% addressable income growth over the next three years.

■ To be an agile, dynamic and data-led organisation, able to identify and take advantage of new opportunities on a timely basis.

■ To benefit from a staff body that is confident, informed and empowered by our shared goal of positively contributing to the BFI’s success.



*Girl* (dir. Adura Onashile)  
Supported by the  
BFI Film Fund



## 3.2 Our culture

We're committed to building an innovative, highly diverse, and digital organisation with creative storytelling at its heart. We will support the development of skills and new ways of working, and ensure no one is left behind.

A place of real passion and fandom, we are creating a culture together that empowers us to:

### **Go confidently**

We listen and learn to lead. Challenging constructively and matching words with actions to stretch our artform, shape the industry and create meaningful change.

### **Think freely**

We unleash our creativity and work flexibly. We stay curious and light on our feet, taking smart risks to bring joy to our audiences.

### **Share generously**

We build expertise and share it. Like an enthusiastic friend, we exchange ideas and democratise thoughtfully to create extraordinary experiences for everyone, not the elite.

### **Bring it together**

We go as one. Actively including and empowering, with trust and transparency at all levels. We pull in and pull together – all in, all heard – to create the greatest possible access and opportunity.

## **Working in a hybrid world**

We are committed to hybrid working. We are creating a supportive and practical environment that facilitates a *work where you can, when you can* approach. This acknowledges both the huge positives this can bring to our people but also the challenges. It also notes the key members of our staff whose work must be undertaken on site.

Recognising that this is new territory for all organisations we will take a 'test, learn and iterate' approach. That way, we can respond effectively to the developing needs and opportunities this brings to us and our people.

We will also look at how this can support our ongoing efforts to open up opportunities to work for the BFI UK-wide.



## Working with partners

The success of our strategy is dependent on the work of hundreds of individuals, businesses and organisations – including our National Lottery-funded partners – both across the UK and through our international collaborations.

We will always strive to be a good partner, and this means:

- Seeking partners through open and transparent processes.
- Being responsive to the needs of our partners.
- Sharing information generously.
- Only requesting the information that we need, and when we need it.
- Paying others for their work in a timely fashion.
- Recognising and crediting the contribution of others in our work.

## Our commitment to inclusion

We champion everyday inclusion at the BFI, with the aim of:

- Enabling the BFI to be a consciously inclusive employer of choice.
- Enhancing the culture and environment for our people to deliver their work in a way that is inclusive, equitable and accessible.
- Demonstrating leadership to the wider industry with pioneering interventions.

A clearly defined and communicated set of Inclusion targets will help us to monitor and take greater accountability for our progress. They will give clarity and a clear direction to colleagues, partners and stakeholders.

Guided by these targets, we will create an aspirational approach to enabling real change.

Our **Inclusion Targets** are:

Disability*	<b>18%</b>
Ethnically diverse (London)	<b>40%</b>
Ethnically diverse (outside London)	<b>30%</b>
Gender (50–50 balance of male and female identifying within the gender binary)	<b>50%</b>
LGBTQIA+ (including those identifying outside the gender binary)	<b>10%</b>
Working class background	<b>39%</b>

\*Including those with a longstanding physical or mental condition and those identifying as D/deaf or neurodiverse

These are our targets as of April 2023. We will regularly evaluate this work over the strategy period to ensure our approach is relevant and up to date over time.

## 3.3 Digital-first

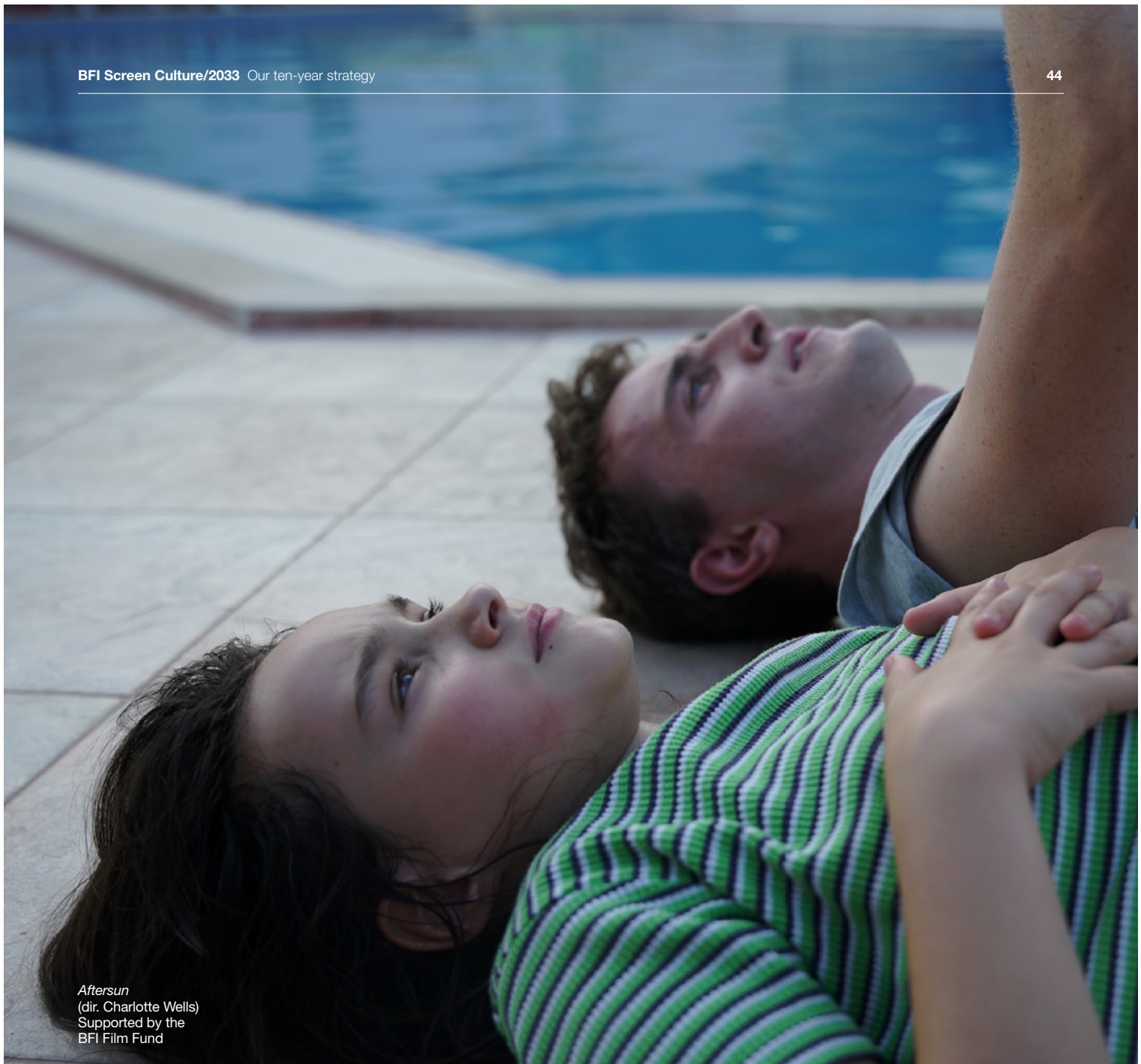
Over the life of this strategy, we will evolve to become truly digital-first in how we think and work.

This means working smartly to streamline our operation, focusing on users' needs, and being willing to redesign how we deliver our services to better meet those needs (as opposed to just bolting on technology). It also means doing so continuously as needs change and we learn more. Being digital-first is how we will scale up, open up and become more fleet-of-foot as an organisation, so that we achieve more with less and respond rapidly to changes around us.

In practice, we will:

- **Adopt modern, cloud-based workplace technologies** and develop the skills across our workforce to use them well. This will improve our ability to communicate and collaborate and ensure our staff can work efficiently and productively when and where their job requires them to be.
- **Review and cohere all our back-office systems and software**, and digitise and automate more of our internal processes. We will ensure technology helps teams across the BFI to deliver the most public benefit possible with the lowest possible overheads.
- **Embed a culture and practice of user-centred service design**, basing decisions on user research and usage data. This will be enabled by effective and secure systems for collecting, managing and interpreting data insights and sharing them internally to build awareness and empathy.
- **Embed a culture and practice of continuous improvement**, experimentation and adaptability. By bringing the methods and mindset of agile project management into all parts of the BFI we will iterate our products and services, share goals across organisational boundaries and flex our processes as needed.
- **Embrace openness in all that we do**, sharing our thinking and progress through our new blog and on social media. We will be visible and accessible individually and collectively online, and seek inspiration and feedback from a wide range of sources.

Finally, it is important to emphasise that digital-first does not mean digital-only. We are acutely aware of the digitally excluded, and will ensure offline support is available for those who need it. Non-digital alternatives will remain available for all relevant services, so that nobody is left behind through lack of access to technology, skills or connectivity.



*Aftersun*  
(dir. Charlotte Wells)  
Supported by the  
BFI Film Fund

### **3.4 Our National Lottery funding**

**In line with our ten-year National Lottery Strategy, we will make investments designed to deliver the greatest possible benefit to the public.**



## The strategic context

Public funding plays an integral role in the UK's screen sectors. For many years it has nurtured filmmakers and creative risk-takers and connected audiences to a rich range of screen culture – in a way that the market cannot. Over the next 10 years, it has an equally essential role to play.

We are the UK-wide distributor of National Lottery 'good cause' funding for film. Consequently, the [BFI's National Lottery Policy Directions](#) set out by the Department for Digital, Culture, Media and Sport (DCMS) require us to:

- Involve the public and local communities in making policies and setting priorities for how we use this good cause funding.
- Encourage new talent, innovation, excellence and to help people to deliver new skills.
- Ensure that film is central to the lives of UK citizens, and to improve the quality of British film and raise its profile in the marketplace.
- Inspire children and young people.
- Improve community cohesion and/or social inclusion.
- Unlock film heritage for everyone in the UK.
- Increase access and participation for those in sections of society who do not currently benefit from opportunities available.
- Help the sector develop sustainably.
- Support equality of opportunity across the UK.

The BFI National Lottery Strategy 2023–2033 aims to deliver the greatest possible benefit to the public and the sector. Over a 13-month period, we consulted extensively to understand public and UK screen sector priorities for the next 10 years. We identified how our funding can best support UK screen culture to thrive as both audiences and the sector continue to evolve. We also evaluated a wide range of our current National Lottery-funded activity to make sure our strategy was based on solid evidence.

Every investment we make over the next 10 years will have to demonstrate how it delivers against our new strategy. As we head into this period, our available BFI National Lottery funding will be in the region of £45m. This is 10% lower than during our previous strategy, *BFI2022*. As a result, it is even more important that every investment we make delivers the greatest possible return to the public.

BFI National Lottery funding has historically focused primarily on film. But the rapid evolution of moving image storytelling and the convergence of film with forms including television, video games, and interactive and immersive technologies, means National Lottery funding may have a broader role to play in future. This is something we will continue to monitor and assess over the course of the strategy period.

## Our strategy in brief

Over the next 10 years, we will use National Lottery funding to drive change against three strategic principles and four major objectives.

The **three principles are our cross-cutting priorities** which span every area of our organisational and National Lottery activity. They ensure that every single penny of our funding will work to make a difference. The principles focus on:

- A.** Making screen culture more equitable, diverse and inclusive.
- B.** Supporting screen culture to thrive across the UK.
- C.** Making screen culture more environmentally sustainable.

Our four objectives are our long-term ambitions for the strategy period. They set out a bold vision of where we would like to see the sector in ten years' time, based on our consultation with the public and the sector.

They envision a world in which:

- 1. Everyone can experience a great range of stories on screen.**
- 2. Anyone can create original screen work, from first-time creators to world-class professionals.**
- 3. The UK screen sector's workforce is skilled and reflective of the population.**
- 4. Independents and cultural organisations can adapt and thrive in a changing landscape.**

Partnerships with a network of external organisations will be at the heart of our investments. Through collaboration, we can ensure our funded activity draws on the wide-ranging knowledge and experience of people in every part of the country and that it responds to the varying needs of each of the regions and devolved nations of the UK.

We will also continue to work to understand the need for National Lottery intervention across the broader screen sectors – from television and video games to interactive and immersive work. Given the reduced amount of funding available as we move into the

strategy period, our interventions in these areas will need to start small, in limited areas including research. We will scale support in future, subject to available funding and solid evidence of the need and benefit of doing so.

## Our strategy in practice

Our National Lottery Strategy is accompanied by a series of Funding Plans that detail the specific funds and programmes we will use to achieve our aims. The Plans will set out our financial commitments in detail and will cover a period of three years, with the exception of the skills hubs which will be awarded for an initial five-year period. The first Funding Plan, covering 2023-2026 has been published alongside the Strategy.

By running shorter Funding Plans we can adapt our delivery, amending or introducing new funds and programmes as we establish which are most effective. We can also respond as the needs of the screen sector evolve and as the amount of available funding changes.

We have developed a set of 16 outcomes for the strategy period, four of which correspond to each major objective. These measurable outcomes will serve as the starting point for designing our funds and programmes and detail the specific changes, benefits and impacts needed for success. They will allow us to monitor and evaluate every fund and programme we run.

**They are:**

- 1. Everyone can experience a great range of stories on screen.**
  - Children and young people are empowered to develop their own relationships with a wider range of screen culture, including through education.
  - People across the UK can access a wider choice of film and the moving image including stories that reflect their lives.
  - Funding helps to tackle social, economic, and geographic barriers for screen audiences in new and effective ways.
  - More people can engage with heritage collections that better reflect the diversity of the UK.

## 2. Anyone can create original screen work, from first-time creators to world-class professionals.

- More people understand how to express their creativity through stories on screen, including children and young people.
- Creative talent is supported and nurtured, both as they emerge and throughout their careers.
- People are better enabled to innovate and experiment creatively.
- A wider range of stories are told that otherwise wouldn't be.

## 3. The UK screen sector workforce is skilled and reflective of the population.

- Equitable and more visible routes into the sector for people of all ages.
- People from under-represented groups across the UK can access the support they need to develop their careers and skills.
- Workforce retention is improved by building inclusive, flexible and supportive workplaces.
- Vital skills for the sector that cannot be delivered by the commercial market are developed.

## 4. Independents and cultural organisations can adapt and thrive in a changing landscape.

- Better support is available for small and medium-sized enterprises and independents to develop their businesses.
- An increase in the international engagement and reach of the UK screen sector.
- Evidence-based insight and analysis of the screen sector is readily available to all, supporting organisations and driving policymaking.
- Screen organisations have significantly reduced their carbon footprint.

## What does success look like?

By the end of the strategy period:

- **The UK screen sectors will be more equitable, diverse and inclusive.** National Lottery investment will have helped redress long-standing inequalities of representation in UK screen – from the stories told, to the opportunities available to experience, create and work in moving image sectors.
- **The screen sectors are bringing even greater benefit to people right across the UK.** Investment will have responded effectively to varying needs across the nations and regions and delivered benefit to them.
- **The UK screen sectors will be environmentally sustainable.** National Lottery funding will have helped to reduce the environmental impact of film, video games and the moving image. It will also have shifted hearts and minds on the importance of reducing humanity's impact on the planet by supporting work that engages with themes of environmental sustainability.
- **Everyone will be able to experience a rich range of stories on screen.** National Lottery funding will have improved opportunities to access and experience a rich range of moving image storytelling. **Anyone will be able to create original screen work, from first-time creators to world-class professionals.** National Lottery funding will have supported people of all ages and all skill levels to express themselves creatively through stories on screen.
- **The UK screen sector workforce will be skilled and reflect the population.** National Lottery funding will have helped people from the widest range of backgrounds across the UK to access and develop careers in the sector in a sustainable fashion. Complementing the effort and investment of the industry at large.
- **Independents and cultural organisations will have adapted and be thriving in a changing landscape.** National Lottery funding will have helped organisations deliver continued public benefit by helping them to respond to evolving audiences and market conditions.



## 3.5 Closing words and how we are going to report

*Screen Culture* is the BFI's ten-year strategy that will steer us towards our centenary in 2033, driven by our major ambitions. How and when we make progress towards achieving our ambitions will change and could be influenced by many external factors.

So, we will take an agile and iterative approach to how we deliver and how we report.

As part of our digital-first ambitions, we will open up and become more fleet-of-foot as an organisation. We want to share our knowledge generously and discuss successes, work-in-progress and challenges openly.

- You are reading this strategy within a new BFI blog, where we will begin to profile our work and where we can report on progress in real time.
- We will be publishing an open roadmap, and provide updates when it changes.
- We will provide the starting point and indicative timescales for initial delivery of the strategy, and how we will evaluate, within the next 3 to 6 months.

We will continue to publish progress through our Annual Review.

We also want to hear from you and welcome your feedback on the strategy. You can share thoughts by email, to [bfiscreenculture2033@bfi.org.uk](mailto:bfiscreenculture2033@bfi.org.uk) or post your comments on our [blog](#).



THIS WAY FOR #LFF

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