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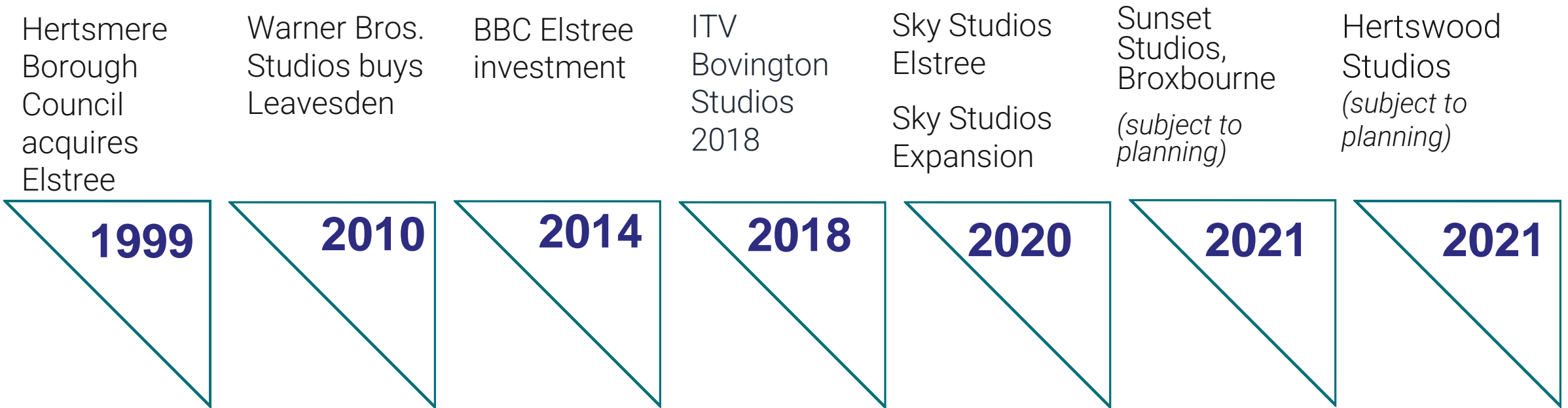
Spotlight on film and TV

# Hertfordshire the new Hollywood: growing a world-class film and TV sector

Neil Hayes, CEO, Hertfordshire LEP, October 2021



# Timeline of recent studio investment

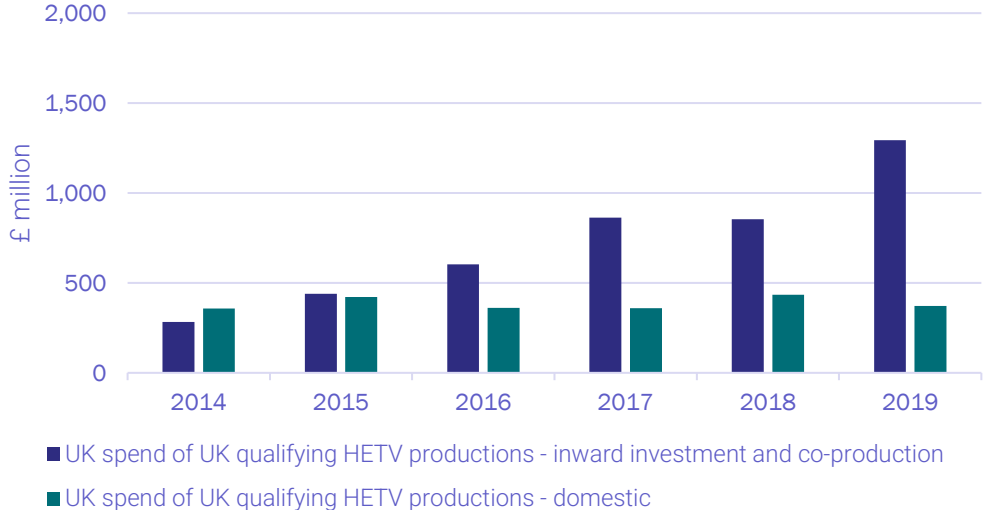




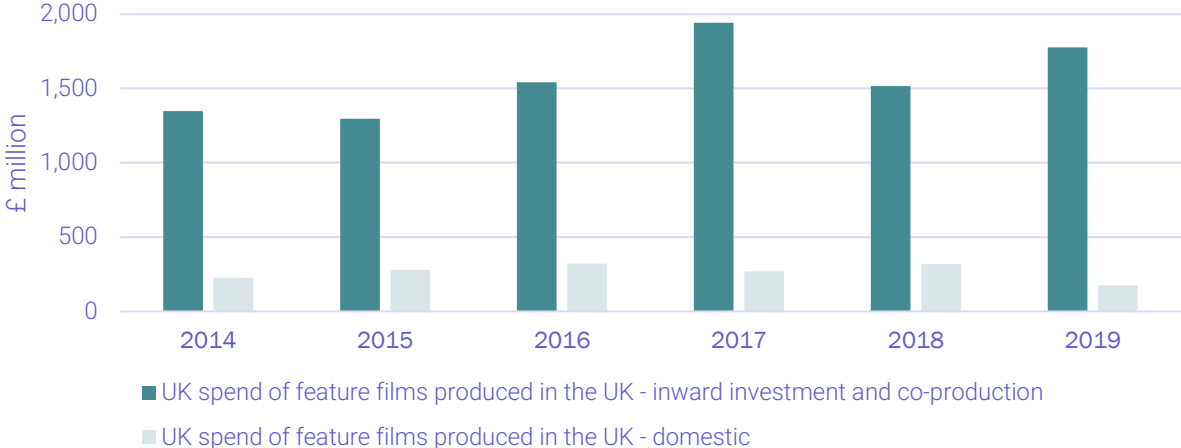
# A boomtime for Hertfordshire?

# Substantial growth but also change...

### UK spend of High End TV Productions



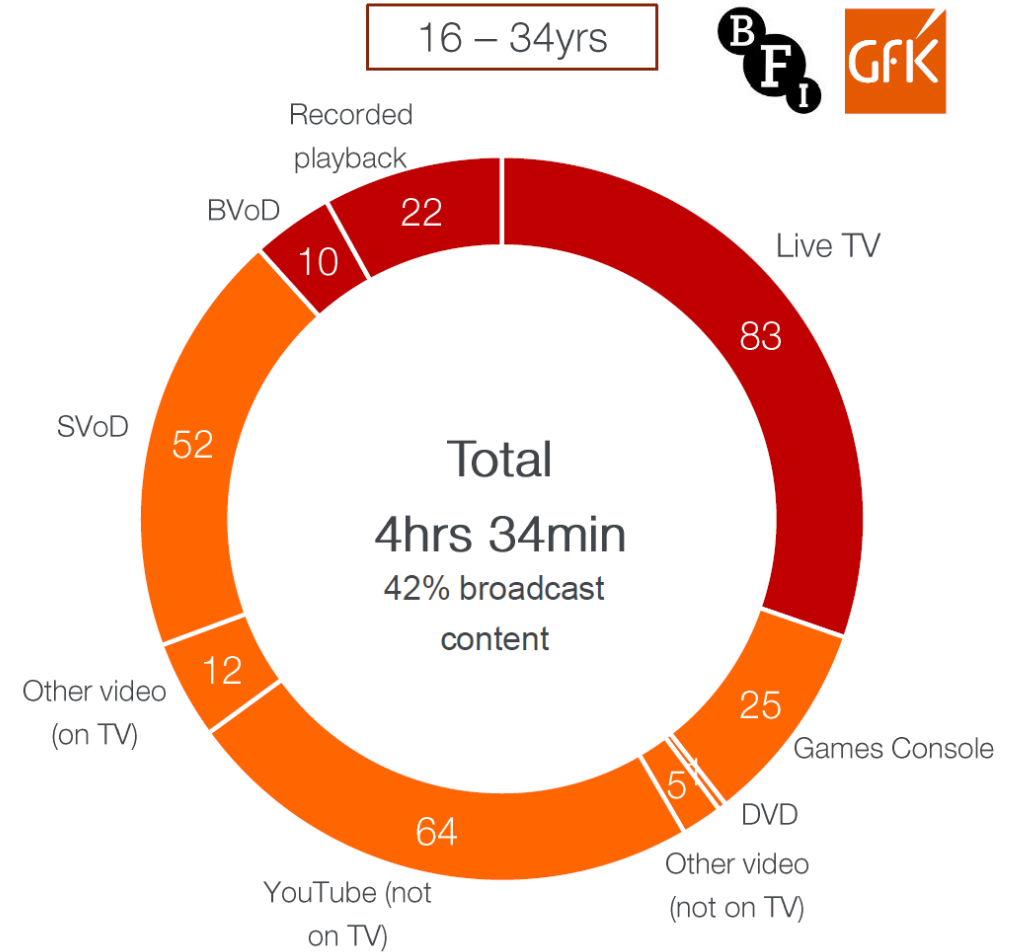
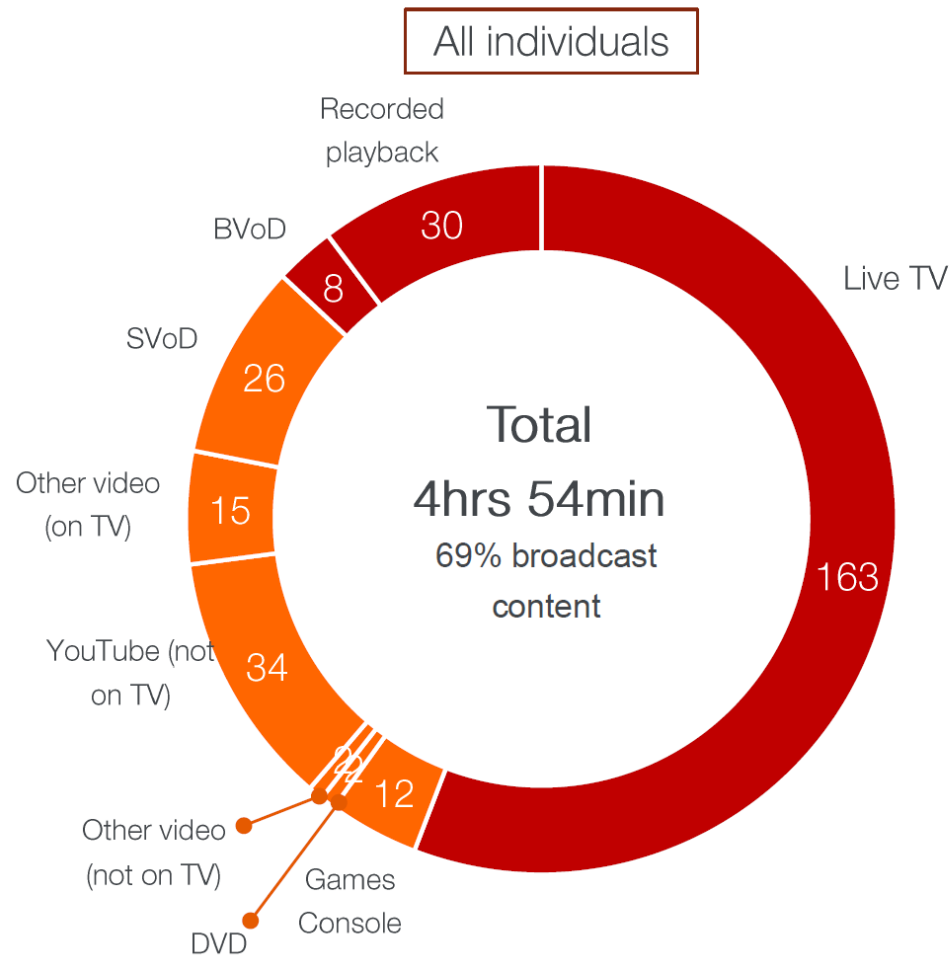
### UK spend of Feature Films



[Source: BFI Statistical Yearbook, 2020]



# ...which is likely to continue



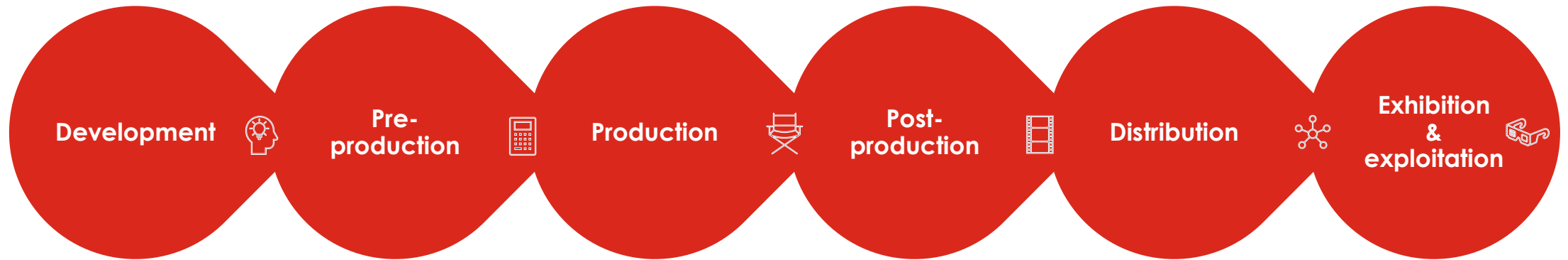
Source: Ofcom Total AV modelling using BARB, Touchpoints and ComScore data, 2018



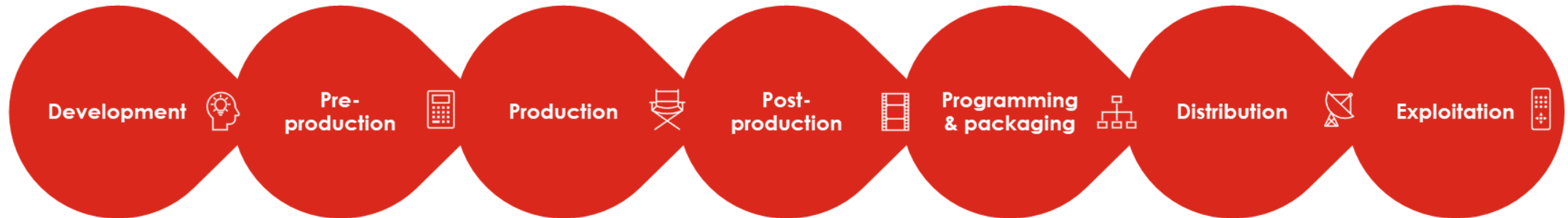


# Value chains for film and TV are lengthy...

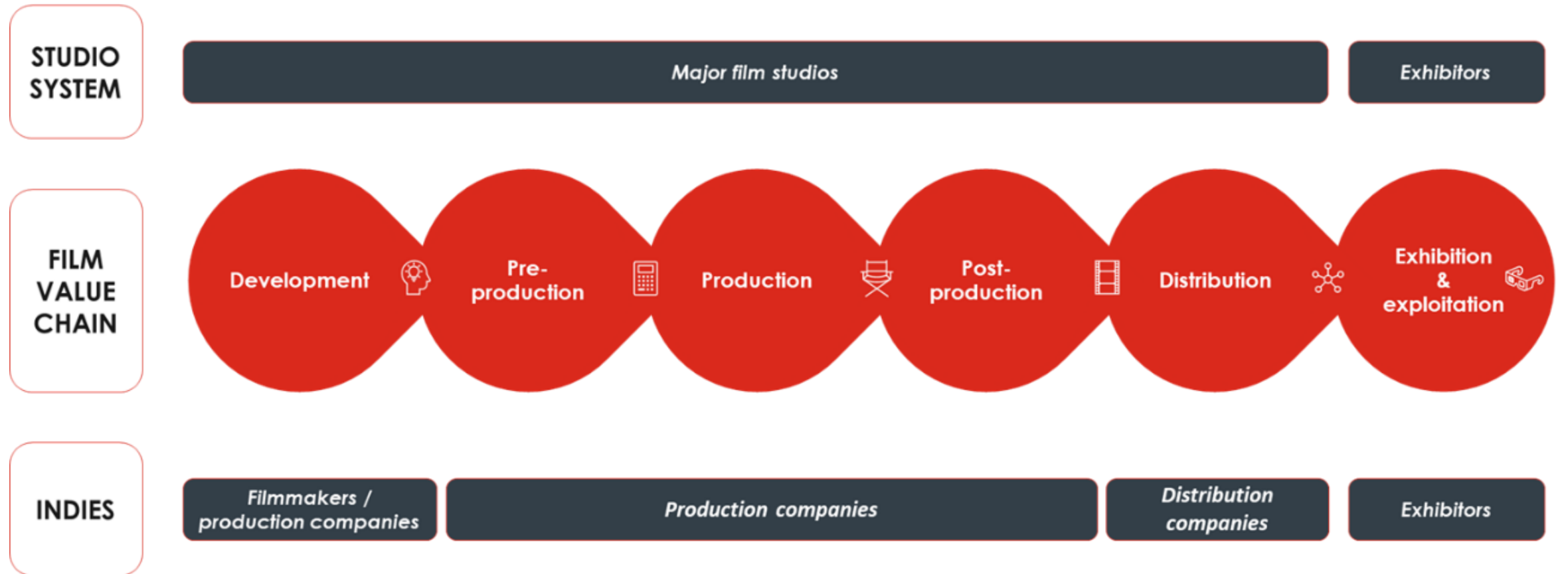
FILM



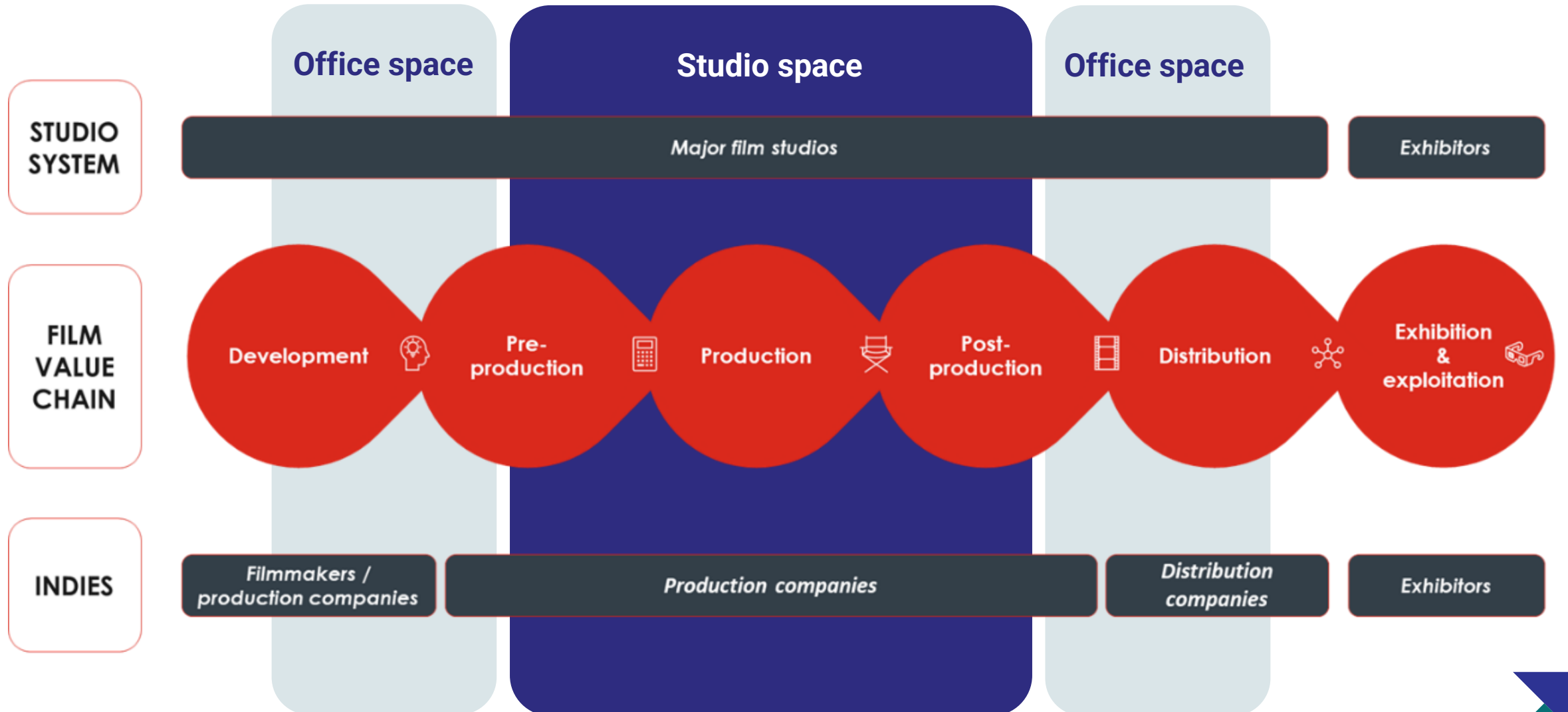
TV



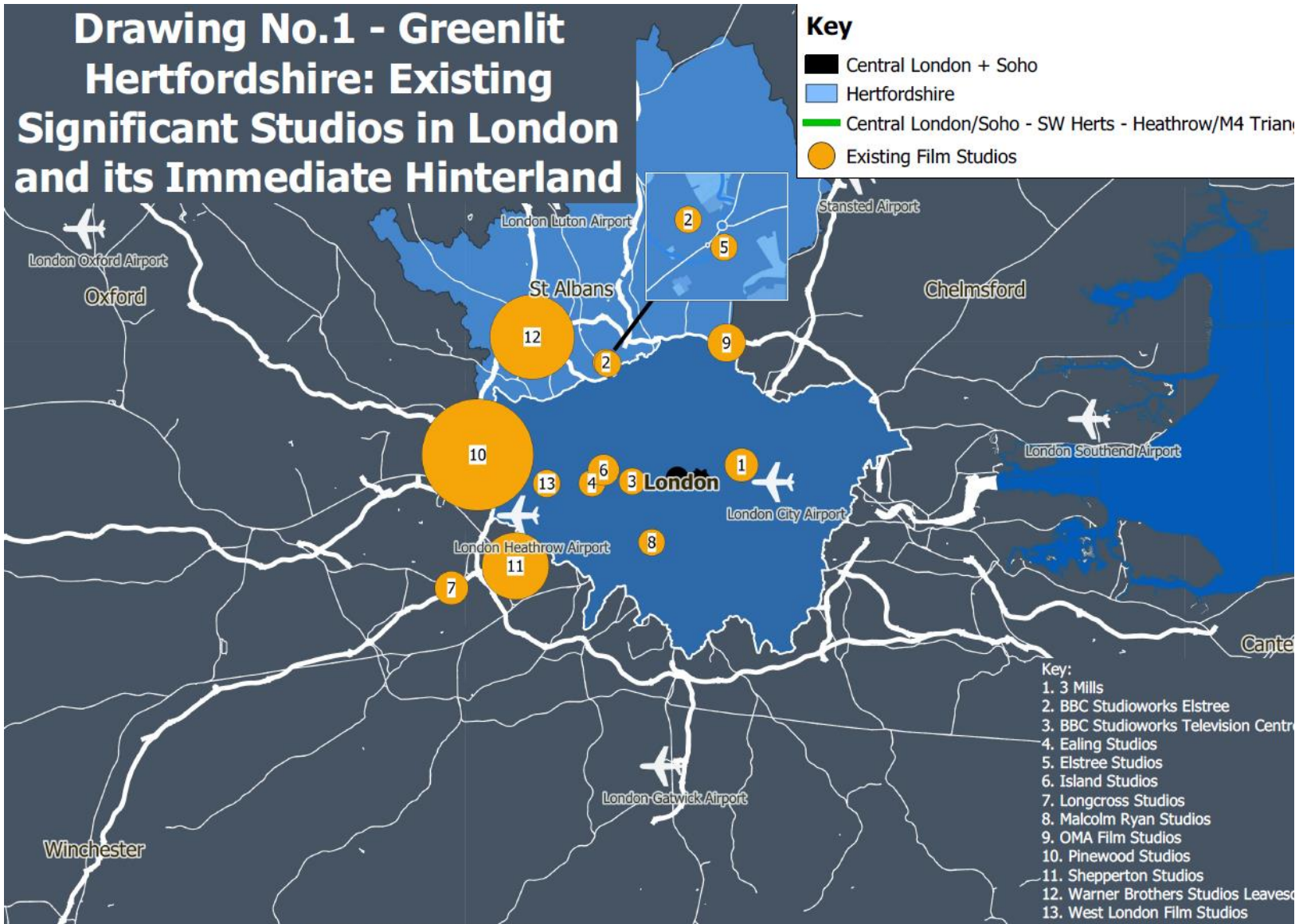
# ..with an increasingly complicated and fragmented industrial structure



# ..and requirements for different kinds of space

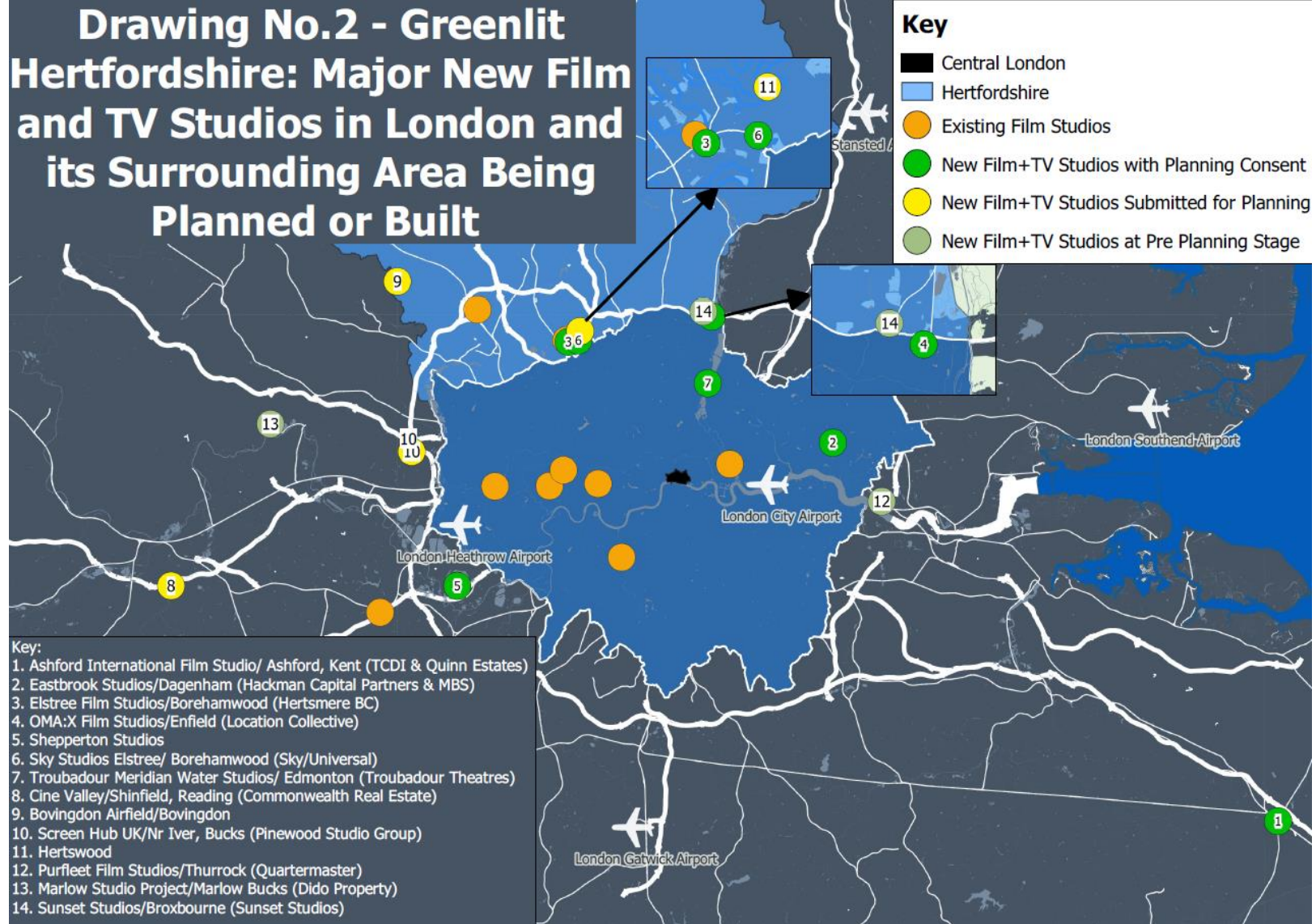






[Source: Civix/Markides]

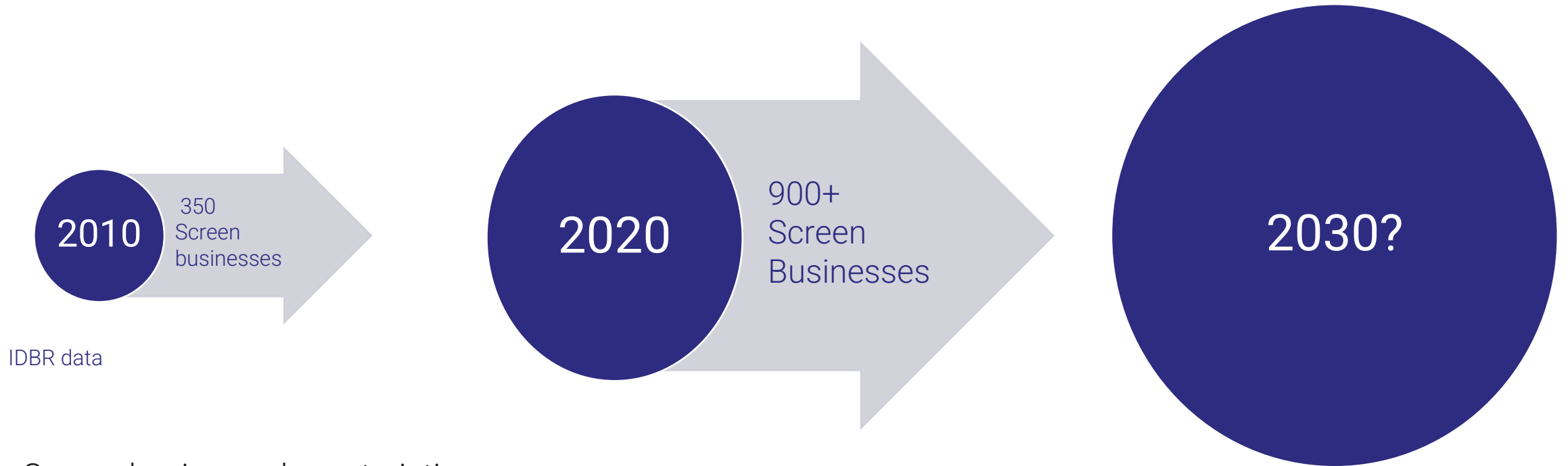




[Source: Civix/Markides]



# Business growth & implications



## Screen business characteristics:

- freelance
  - highly skilled
  - heavily London-centric
  - around 50% self-employed
- 
- Assuming around 70% additional studio expansion, this is set to grow even further





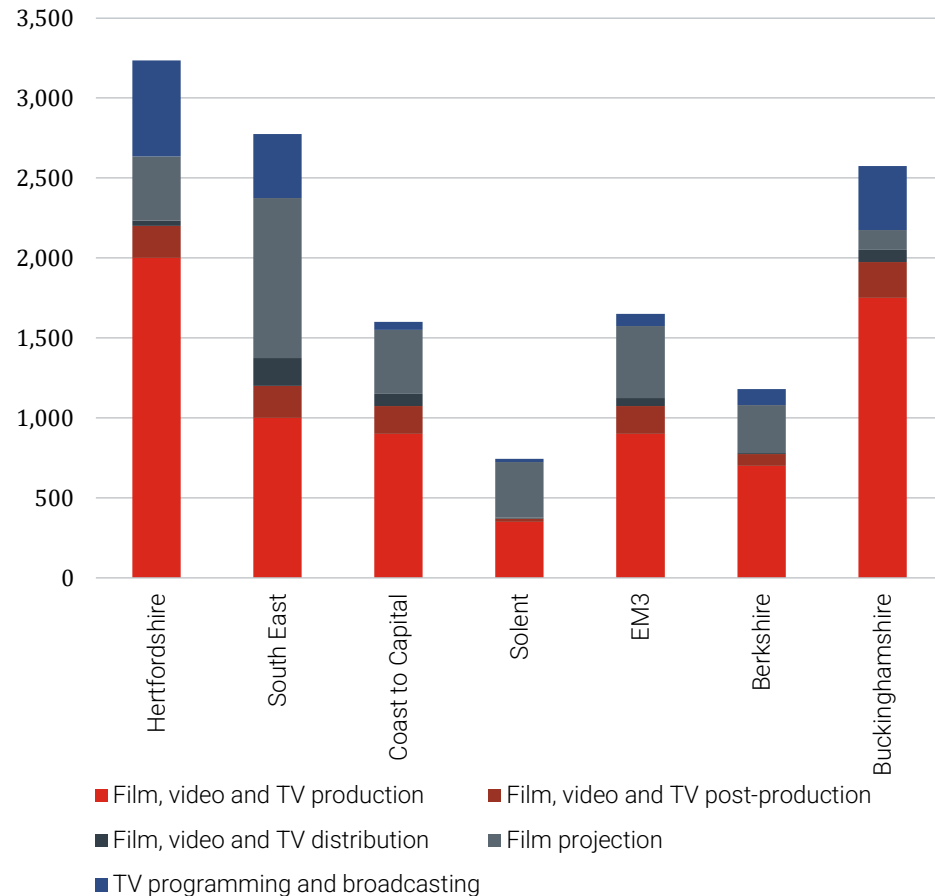


## Levels of sector employment



# High and growing levels of employment across sector

Film & TV sector, scale and composition across LEP areas, 2019



[Source: Business Register and Employment Survey, 2021]

Local Authority District	LEP area	Film and TV	
		Location quotient	Employment
Three Rivers	Hertfordshire	5.2	1065
	Hertfordshire	2.6	650
Buckinghamshire	Buckinghamshire	2.3	2575
Spelthorne	Enterprise M3	1.7	305

[Source: BRES, SIC codes: 59.11, 59.12, 59.13, 59.14, 60.20, LQs relative to England]



Servicing the sector:  
a curriculum pipeline:





# Specialist skills and employment provision

Institution	Courses
<b>University of Hertfordshire</b>	Undergraduate courses in animation, visual effects, and film and television production Postgraduate courses in animation, film and television production, music and sound for film
<b>Hertford Regional College</b>	Levels 1-3 and 4-5 (Higher Education): courses in creative media production (including editing, directing, scriptwriting, cinematography, camera techniques, filming), performing arts and production arts
<b>West Herts College</b>	Levels 2-3: courses in creative media production (film and TV), performing arts and production arts Part-time: courses in creative media production (camera skills, post media production), performing arts (acting for film and TV) Higher Education: course in creative media production (film)
<b>North Hertfordshire College</b>	Level 1-3: courses in art, design and media, creative media production, performing arts and production arts
<b>Oaklands College</b>	Levels 2-3: courses in creative media production & technology, performing and production arts
<b>Elstree Screen Arts Academy</b>	Levels 1-3: courses in creative media production, performing arts, production technology, visual arts Level 4: course in technical and production practice for the creative industries UK Centre of Screen Excellence: craft courses in lighting, grip, hair & make-up, costume, art direction and production assistant





Lights, camera, action!



# The range of skills needed to make a film

## Development and pre-production

- **Story development** – screenwriter, editor, researcher, script reader, etc.
- **Directors** – directors and assistant, script assistant, etc.
- **Producers** – executive producers and assistants, line producers, set runner, etc.
- **Casting** – casting director, casting assistant, etc.

## Production

- **Locations** – location manager, location scout, location production assistant, etc.
- **Set Decoration** – set decorator, set buyer, on-set dresser, etc.
- **Props** – prop master, prop crew, etc.
- **Make-up/Hair** – makeup artist, hair stylist, etc.
- **Costume** – costume designer, costume buyer, dresser, seamstress, cutter, etc.
- **Art Department** – production designer, set designer, illustrator, art co-ordinator, etc.
- **Construction** – construction buyer, foreman, lead carpenter, sculptor, etc.
- **Paint** – paint co-ordinator, paint foreman, scenic artist, plasterer, etc.
- **Camera** – cinematographer, stills photographer, clapper loader, etc.
- **Grip** – key grip, rigging grip, swing, etc.
- **Lighting** – gaffer, best boy, rigging gaffer, generator operator, etc.
- **Production Sound** – sound designer, sound mixer, boom operator, playback operator, etc.
- **Special Effects** – SFX supervisor, key special effects, model maker, etc.
- **Craft services** – First aid, craft services assistant, etc.
- **Catering** – head chef, sous chef, assistant
- **Transportation** – co-ordinator, captain, driver, etc.
- **Greenery** – Head greensperson, best boy greenery, etc.

## Post-production

- **Music** – music supervisor, composer, etc.
- **Picture Editing** – supervising editor, editor, etc.
- **Sound editing** – supervising editor, sound effects editor
- **Visual Effects** – supervisor, light artist, texture artist, layout artist
- **Post-production** – supervisor, co-ordinator, etc







## Let's pause for thought...

- Huge actual and planned investment in studio space – has it peaked?
- Whilst revenues are growing rapidly, the business model has not evolved in response
- Workforce availability pressures – what happens when new studios are fully operational?
- Concerns around:
  - digital connectivity & data needs
  - environmental sustainability linked to Net Zero
- Will 'Levelling up' put weight behind incentivising film & TV production further north?





# Time to strike?

- Southern Hertfordshire is a major focus of sector growth
- Potential to leverage studio investment into broader business & skills facilities
- Development of bespoke business support/growth packages – scaling up
- Role for screen/digital sector in place shaping for SW Herts towns – attracting high value businesses & people
- Sectoral spread of skills can help address wider inclusion ambitions and provide broad range of job opportunities, particularly in SE Herts

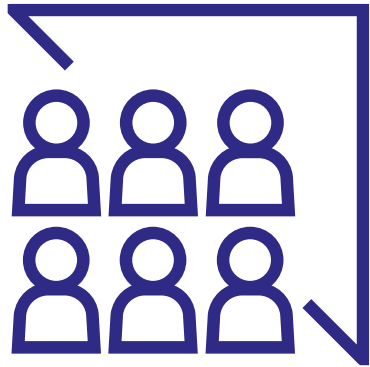


The background is a solid dark blue color. It features several abstract geometric shapes: a large white outline of a right-angled triangle on the left side; a smaller white outline of a right-angled triangle in the upper right; a white square with a dark green triangle in the bottom-left corner in the top right; and several smaller solid dark green triangles scattered throughout the page.

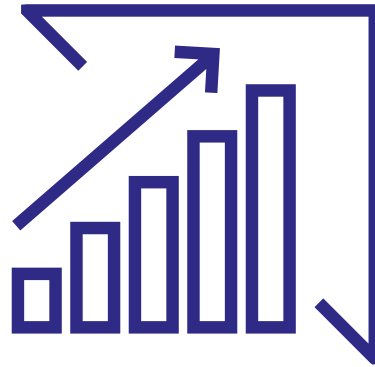
# Our future focus and next steps



# Themes for the Action Plan: 1



'Bridging the gap' – providing future workforce skills and transitioning skills



Developing a tailored SME growth programme



Ensuring a continued flow of sites and premises



Exploring how we can better de-carbonise the film and TV sector



# Themes for the Action Plan: 2

- Improving digital connectivity
- Aligning place shaping with the aspirations of a mobile film and TV community
- Further attraction of visitors and investors as the location of choice
- Exploiting the county's 'screen heritage' in place promotion

Herts LEP to progress the action plan and secure further resources

Some of these interventions will be local; others will require greater collaboration with regional partners and national agencies



The background is a solid dark blue. It features several abstract geometric elements: a large white right-angled triangle on the left side, a smaller white right-angled triangle in the top right, a white right-angled triangle in the middle left, a white right-angled triangle in the bottom right, a teal triangle at the top center, a teal triangle in the middle right, a teal triangle at the bottom right, and a teal triangle on the left side. A white line forms a path that starts at the top left, goes right, then down, then right again, and finally down to the bottom right.

**THANK YOU**

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