

Hertfordshire
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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



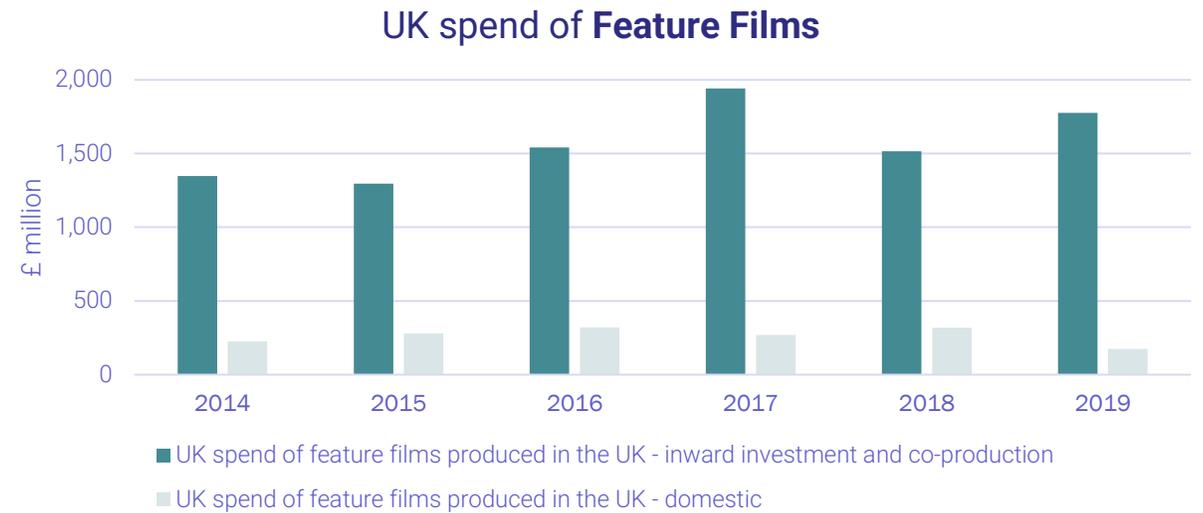
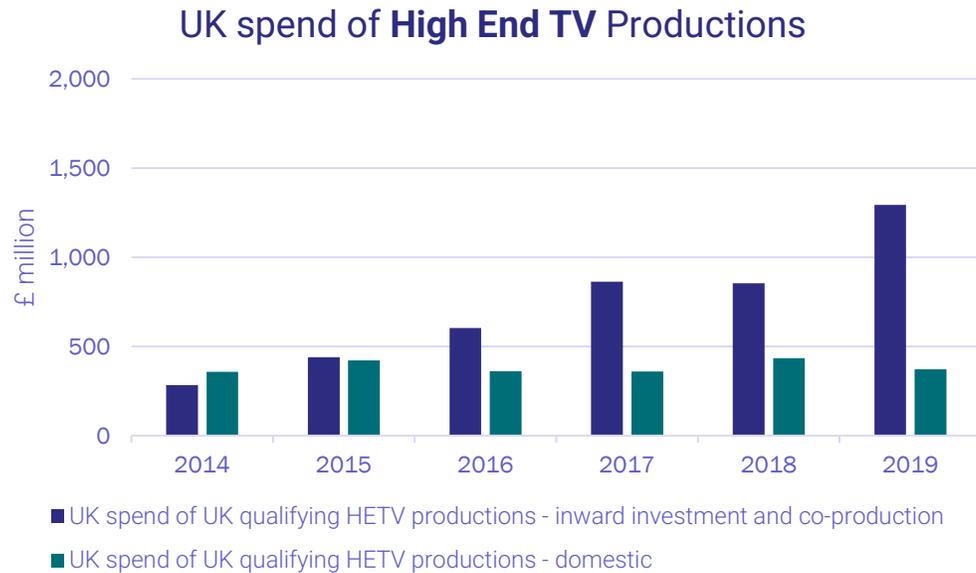
Timeline of recent studio investment



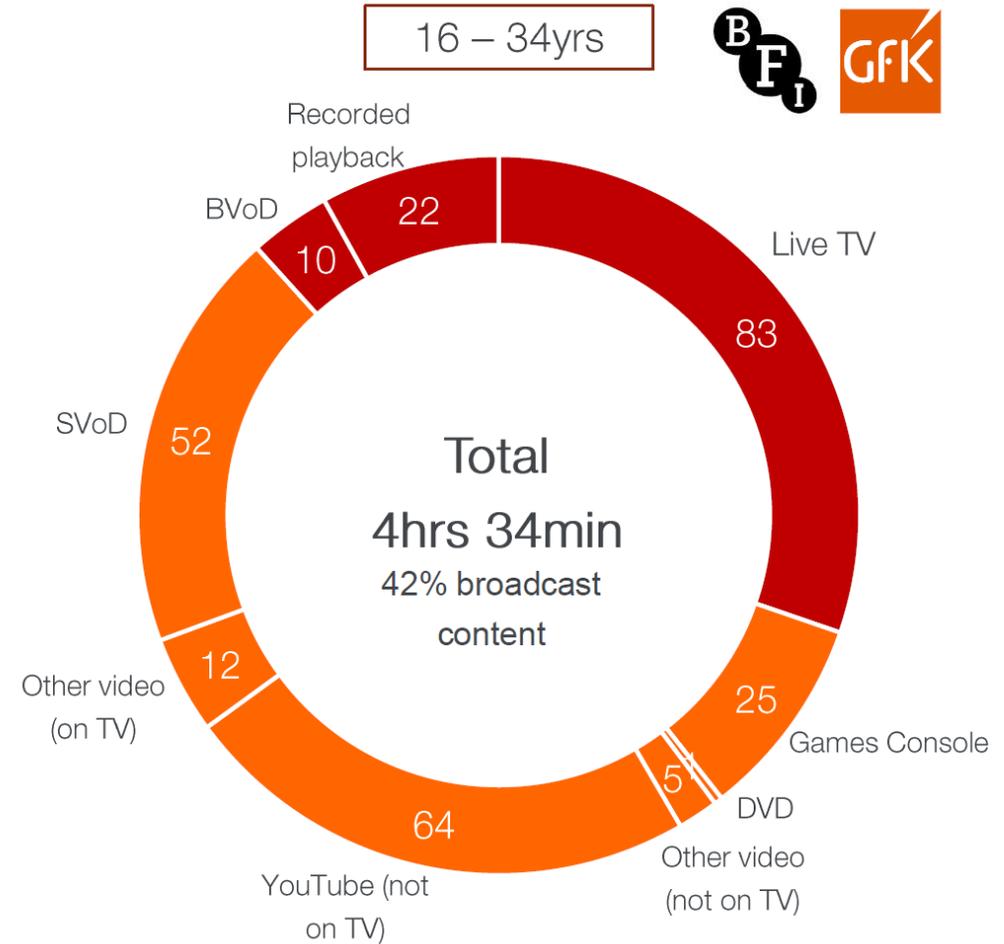
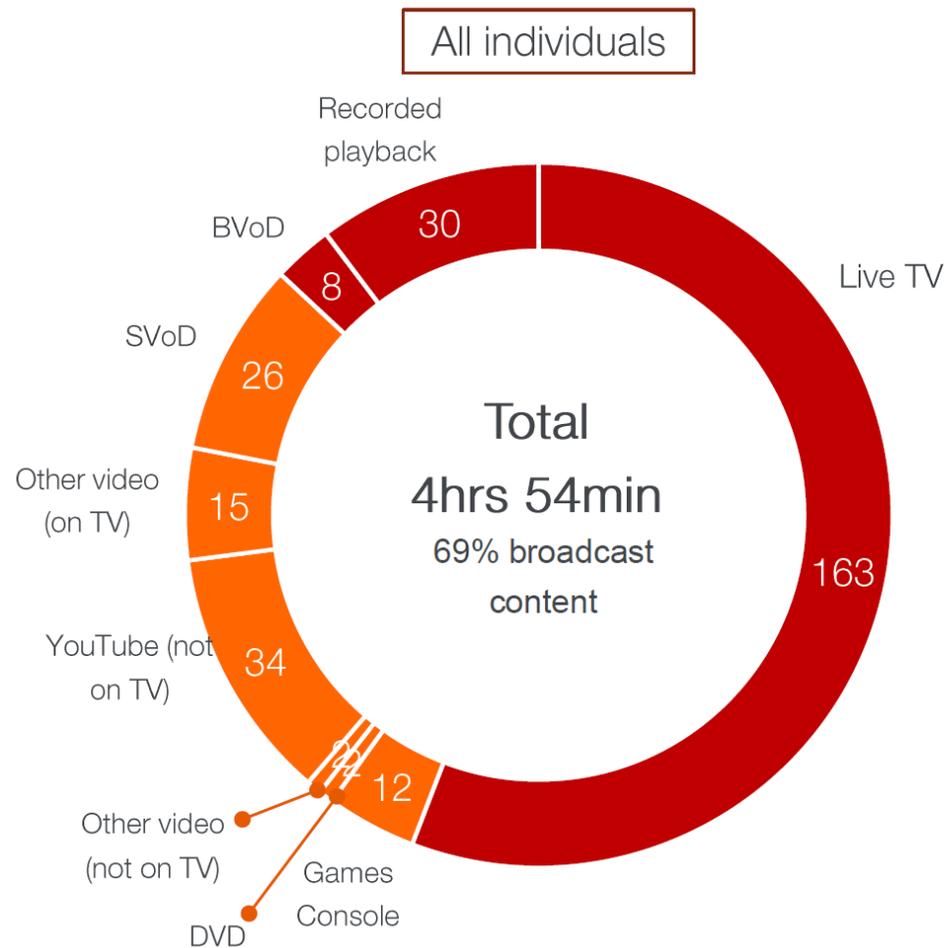


A boomtime for Hertfordshire?

Substantial growth but also change...



...which is likely to continue

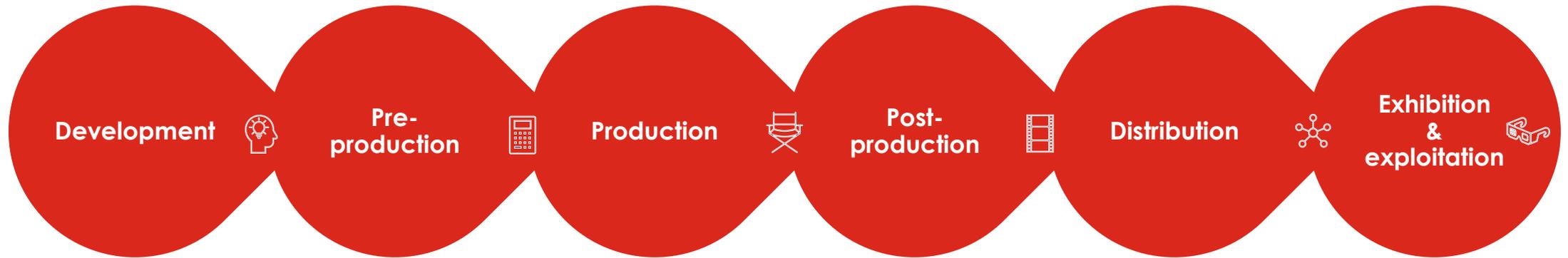


Source: Ofcom Total AV modelling using BARB, Touchpoints and ComScore data, 2018

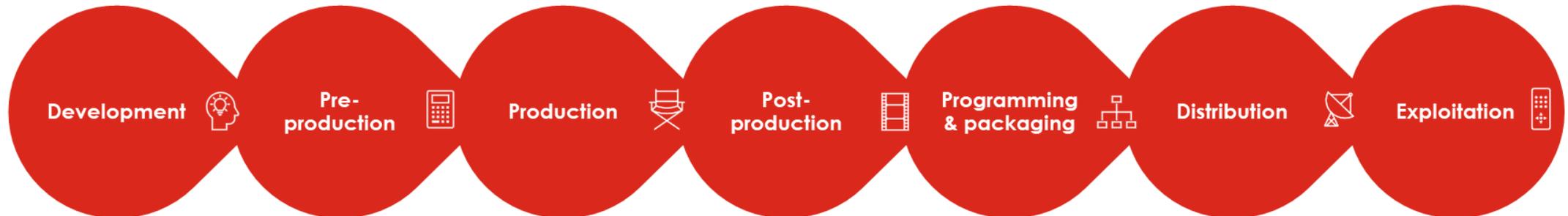


Value chains for film and TV are lengthy...

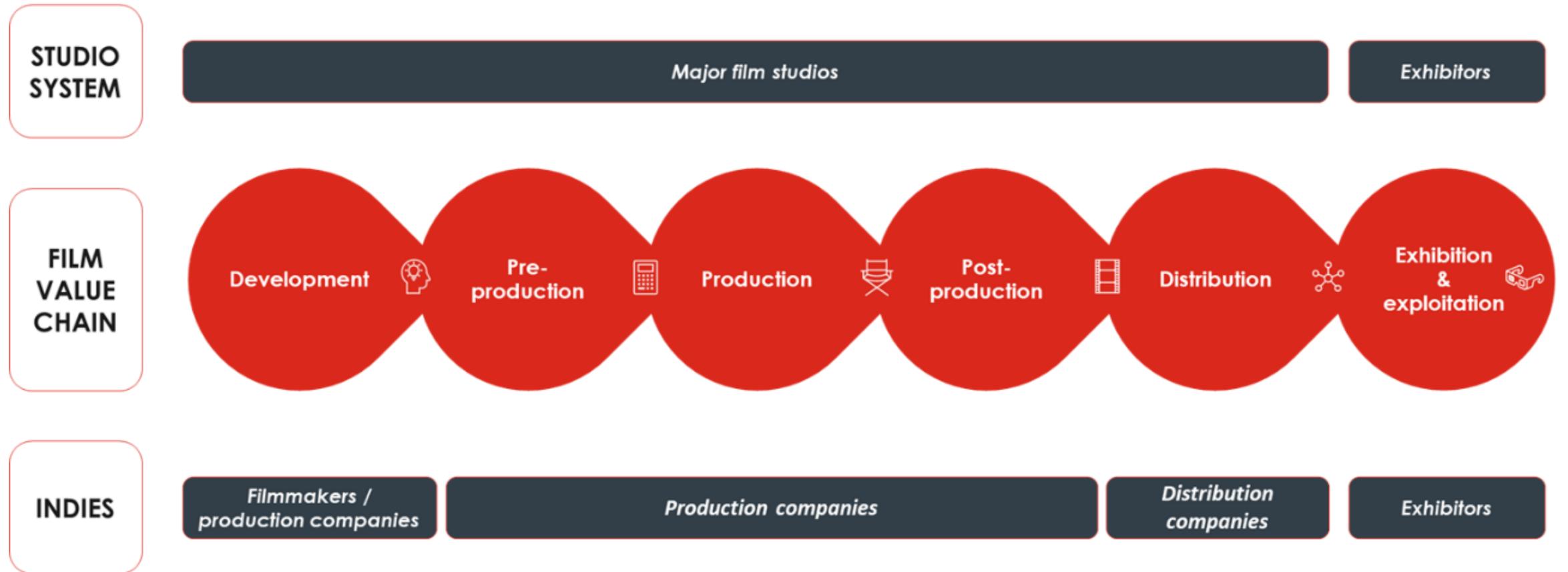
FILM



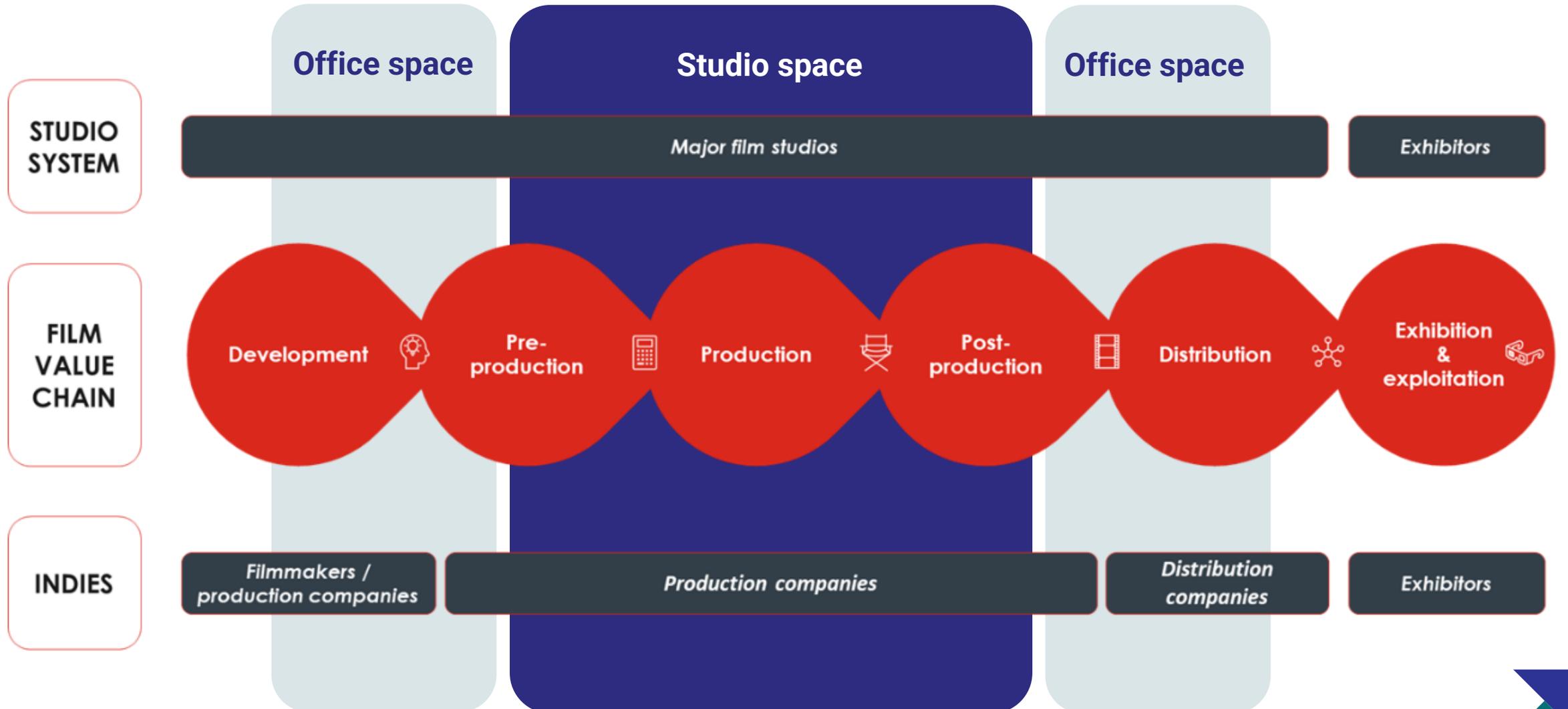
TV

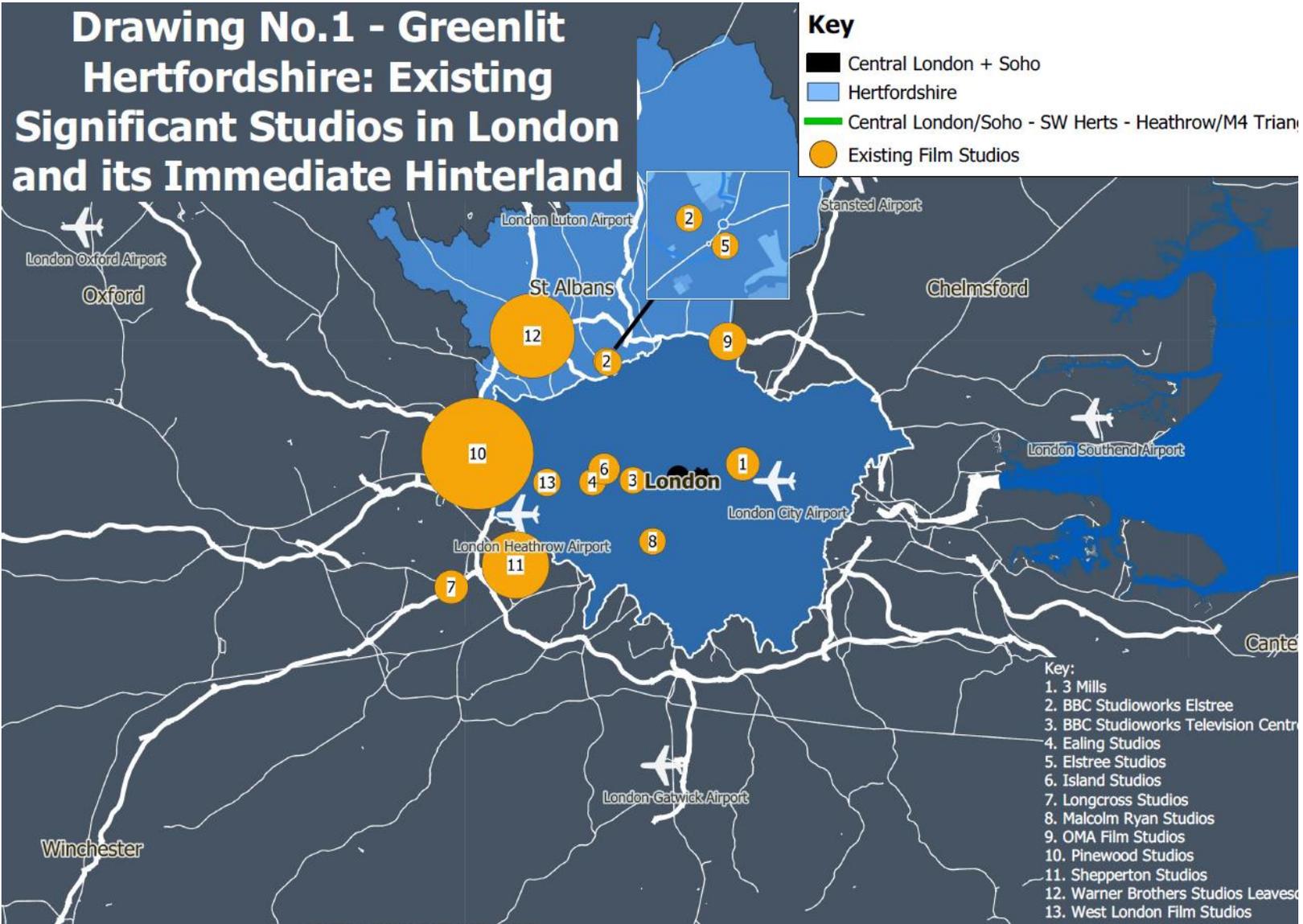


..with an increasingly complicated and fragmented industrial structure



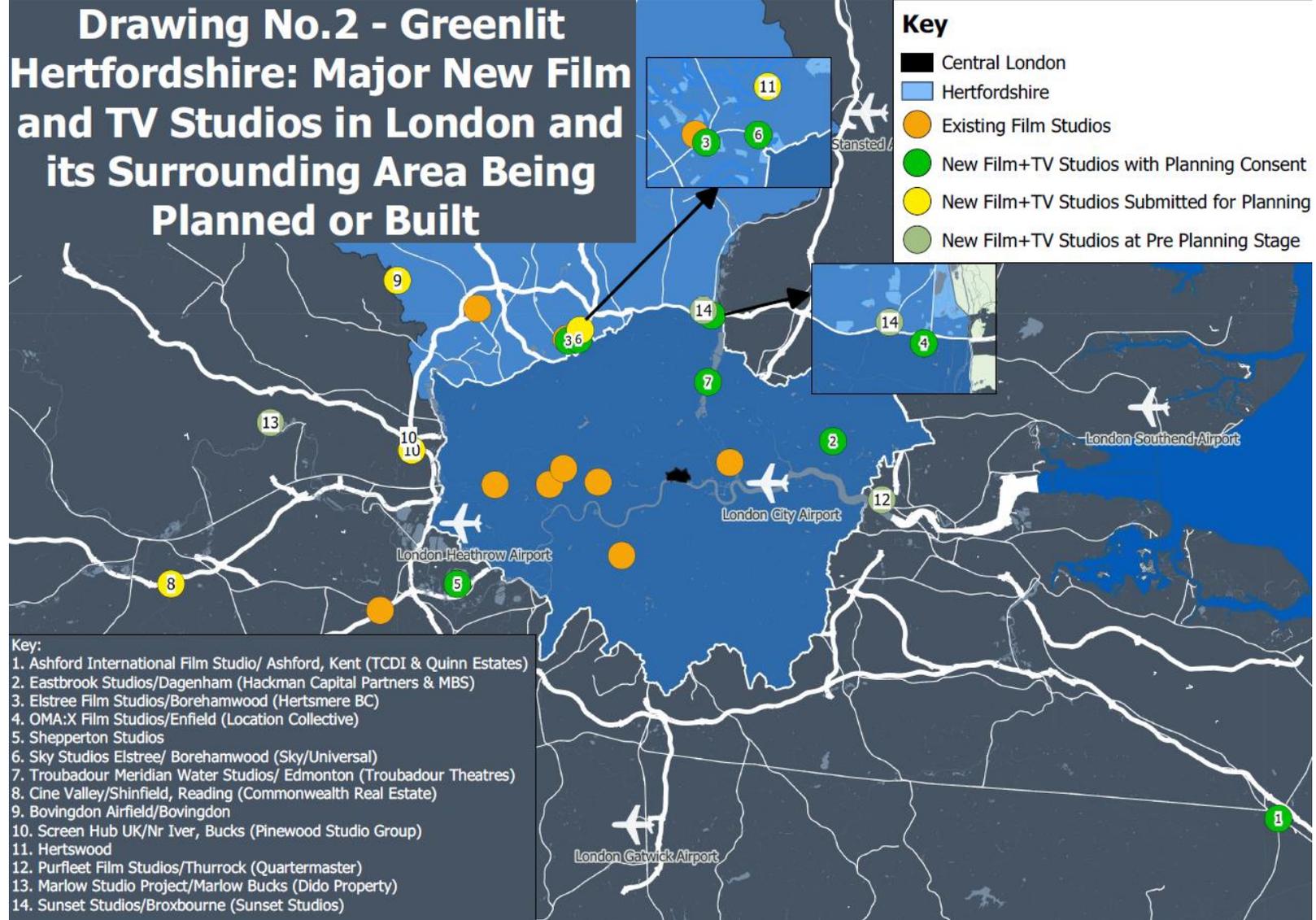
..and requirements for different kinds of space



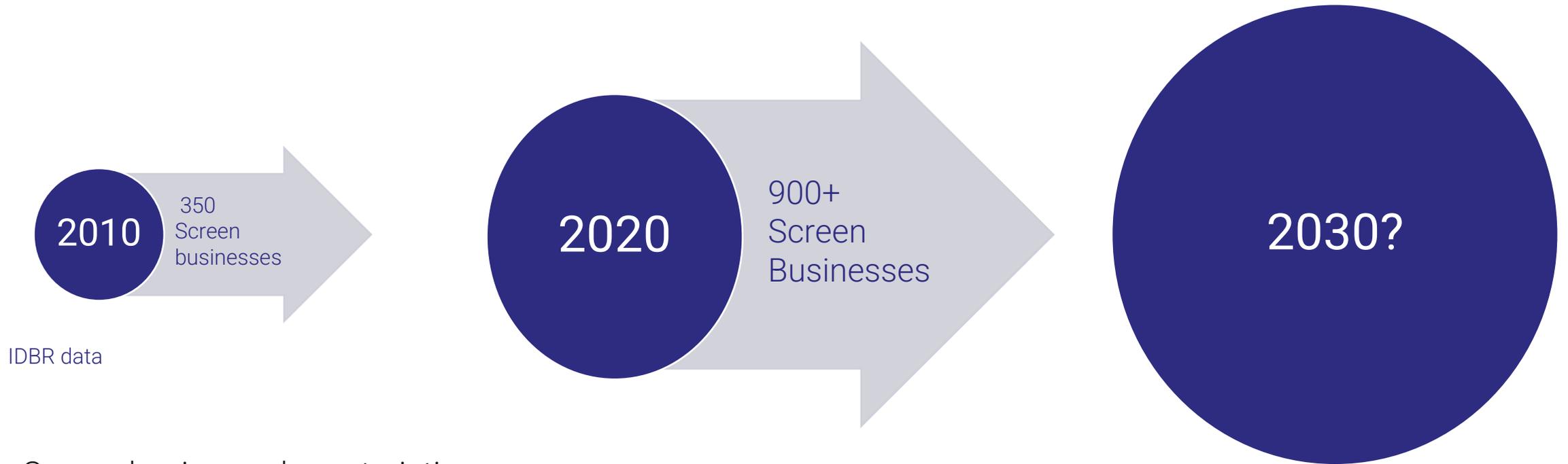


[Source: Civix/Markides]





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



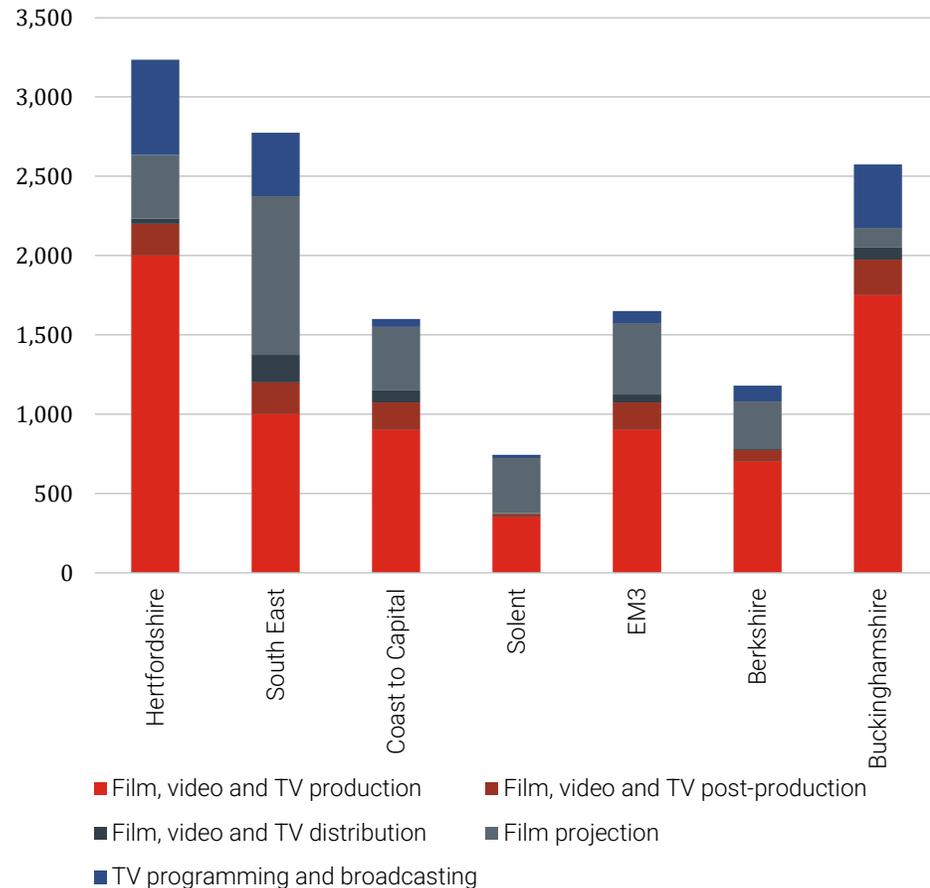


Levels of sector employment



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
University of Hertfordshire	Undergraduate courses in animation, visual effects, and film and television production Postgraduate courses in animation, film and television production, music and sound for film
Hertford Regional College	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
West Herts College	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)
North Hertfordshire College	Level 1-3: courses in art, design and media, creative media production, performing arts and production arts
Oaklands College	Levels 2-3: courses in creative media production & technology, performing and production arts
Elstree Screen Arts Academy	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?

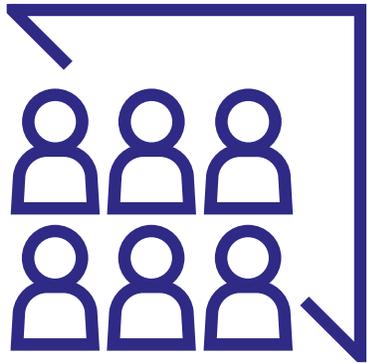
- Southern Hertfordshire is a major focus of sector growth
- Potential to leverage studio investment into broader business & skills facilities
- Development of bespoke business support/growth packages – scaling up
- Role for screen/digital sector in place shaping for SW Herts towns – attracting high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



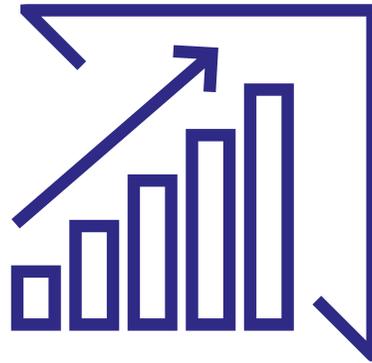
The background is a dark blue color. It features several white and dark green geometric shapes: a large white triangle with a dark green diagonal line, a white square with a dark green diagonal line, and several smaller dark green triangles of various sizes and orientations scattered across the page.

Our future focus and next steps

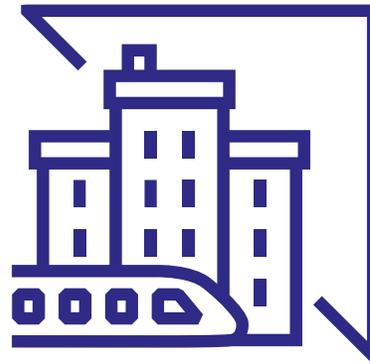
Themes for the Action Plan: 1



'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 shapes: 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 right-angled triangle at the top center, a teal right-angled triangle in the middle right, a teal right-angled triangle in the bottom right, and a teal right-angled 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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