THE ECONOMIC VALUE OF THE SCREEN SECTOR IN SCOTLAND

Research commissioned by Screen Scotland and produced by Saffery Champness and Nordicity

SCREEN SCOTLAND
SGRÌN ALBA

Screen Scotland is the national body that drives development of all aspects of Scotland's film and tv industry, through funding and strategic support. Screen Scotland is part of Creative Scotland and delivers these services and support with funding from Scottish Government and The National Lottery.

Equal opportunities Screen Scotland operates an equal opportunities policy. Our offices have disabled access. Certain publications can be made available in Gaelic, Scots, in large print, Braille or audio format. Contact Enquiries:
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FOREWORD

Any strategy for the Scottish screen sector needs robust numbers — they reveal where there's room for growth, the interdependencies of related sub-sectors, along with the spillover benefits to tourism, retail, hospitality and construction. This *Economic Value of the Screen Sector in Scotland* report delivers the first comprehensive benchmark of the value of Scotland's film and TV industry — including its many associated industries.

In fact, the findings reveal just how significant a part of our creative economy film and television is, and the scale and range of jobs that are possible within Scotland's screen sector.

It is important to note that this study shows where we were in 2019, before Covid but also before the majority of Scotland's studios came online, and before the continuing post-Covid boom in production. Such studies take time to design, implement and deliver but work on a follow-up study of 2021 is already underway, the year in which the current boom in Scotland-based production started in earnest.

So robust is the growth since 2019 that we now believe that if Scotland maintains current levels of investment in skills, infrastructure and talent development within the screen sector, that further significant growth is not only possible but highly likely — GVA for the screen sector in Scotland could double to £1 billion by 2030.

Since its formation in 2018 Screen Scotland has been supporting this growth, while also continuing our investment in local film and TV making talent, in independent film from Scotland and in the expansion of our infrastructure. We are 100% committed to developing and championing Scotland's thriving film and TV industry, and all those who choose to work in — and partner with — our nation's screen sector.

We'd like to thank Saffery Champness and Nordicity for undertaking this significant work on behalf of our industry. We look forward to sharing the set of results in early 2023.

Isabel Davis,
Executive Director, Screen Scotland

David Smith,
Director, Screen Scotland

EXPLANATION OF TERMS

Turnover measures the income collected by a firm or industry from the sale of its final product or service.

GVA (Gross Value-Added impact) measures the value 'added' by that firm or industry to the inputs purchased from other firms or industries in order to create its final products or services for sale. GVA provides a much more indicative measure of economic activity, particularly when summing activity across different industries.

FTE (Full Time Equivalent impact) is a measure of employment and is equal to one person employed full-time for one year, two people employed half-time for one year or *n* people in employment for *1/n* share of the year.

Direct economic impact refers to the employment, COE (compensation of employment) and GVA generated directly within the screen sub-sectors in Scotland.

Indirect economic impact refers to the increased employment, COE and GVA experienced by the businesses located in Scotland that provide supplies and services to businesses and other organisations operating in the screen sub-sectors.

Induced economic impact refers to the increased employment, COE and GVA experienced across the wider Scotland economy, when workers employed on account of the direct and indirect impacts proceed to spend their earnings within Scotland on purchases of consumer goods and services.

Spillover impacts occur when industries outside of the screen sector value chain (*eg* the tourism sector) benefit from screen content. For example, screen tourism can generate additional spending on accommodation, meals, transport and shopping within Scotland's economy, thereby raising employment, COE and GVA.

DEVELOPMENT & PRODUCTION

£398·6m
in production expenditures

£315·1m
GVA

5,120
FTEs

- £195 million direct GVA
  £120 million indirect / induced GVA
- 3,290 direct FTEs
  1,830 indirect / induced FTEs

In Scotland's screen sector, the development and production of screen content was the largest single source of GVA — £315·1 million GVA, contributing over half of the sector's GVA total.

Succession, courtesy of HBO

The Brilliant World of Tom Gates, courtesy of TG Entertainment

DEVELOPMENT

£11m
GVA

250
FTEs

- **£9 million direct GVA**
  £2 million indirect / induced GVA
- **220 direct FTEs**
  30 indirect / induced FTEs
- **An estimated total of £11 million was spent on development of films and TV programmes in Scotland**
- **This included Screen Scotland's £2·4 million in funding, self-funding by production companies (£6·8 million), funding from broadcasters (£1·3 million), funding from distributors (£0·3 million), funding from the BFI (£0·1 million) and other sources (£0·3 million).**

Great ideas for new film and TV programmes are brought to life through the initial stage of development.

In Scotland, producers and screenwriters can access Screen Scotland's support to undertake such development. With Public Service Broadcaster development and production budgets under pressure, and production an increasingly marginal business for independent producers, this public funding is often essential in encouraging growth and support.

Screen Scotland's development funding under both the **Film Development and Production Fund**, and the **Broadcast Content Fund** supports film and programme makers based in Scotland who are working in live-action, animation and documentary, to develop a range of feature film and television projects across all genres. Through these funds, Screen Scotland supports projects that have the potential to be distinctive, high-quality and commercially or creatively-driven.

Producers seeking to develop a range of television projects can access slate funding through the Broadcast Content Fund, which aims to help the sustainable growth of Scotland's broadcast production sector, encouraging the development of new projects, the scaling up of already successful activities and the production of commissioned programmes.

During the 2019/20 fiscal year, Screen Scotland distributed just under £1·1 million in funding the development of 40 film projects. Screen Scotland also disbursed £1·3 million for the development of 23 TV projects.

In total, Screen Scotland provided £2·4 million in development funding to Scotland-based filmmakers, producers and screenwriters in 2019/20. Screen Scotland was the single biggest source of development funding for film and television projects from Scotland in 2019.

PRODUCTION

£304·1m
GVA

4,870
FTEs

- **£186 million direct GVA**
  £118·1 million indirect / induced GVA
- **3,070 direct FTEs**
  1,800 indirect / induced FTEs
- **In total, an estimated £398·6 million was spent on the production of film, TV and other audio visual content in Scotland in 2019. This included content made by Scotland-based producers, producers based outside of Scotland filming in Scotland and PSBs.**

CASE STUDY

Find out more about Glasgow-based independent production company Firecrest Films, their growth and exciting upcoming projects.

www.screen.scot/case-studies

Scotland has a vibrant independent production ecosystem. Axis Animation, Bandicoot, Black Camel, Caravan Cinema, Firecrest Films, Hopscotch Films, Happy Tramp North, Hello Halo, IWC Media, Raise the Roof Productions, Sigma Films, STV Studios, Synchronicity Films, Tern Television, Two Rivers, Unified Theory and Wild Child Animation represent just some of the leading independent film and television production companies based in Scotland.

Alongside these Scotland-based companies, several leading UK production companies based outside Scotland, such as World Productions, BBC Studios, Tinopolis and Objective Media Group, maintain a business base in Scotland.

In recent years, these production companies have overseen the creation of a variety of scripted and unscripted films and TV series from Scotland, including recently *Aftersun*, *Annika*, *Elizabeth is Missing*, *Falling for Figaro*, *Guilt*, *Limbo*, *My Old School*, *Murder Case*, *The Masked Singer*, *The Rig*, *Screw* and *Vigil*.

Screen Scotland's Film Production Funding supports the production of high-quality feature films that have the potential to engage and entertain audiences in Scotland, the UK and internationally. In total, Screen Scotland provided £2·75 million in production funding to Scotland-based filmmakers, producers and screenwriters in 2019/20.

Limbo, courtesy of MUBI

Fast & Furious 9, courtesy of Universal Pictures

CASE STUDY

Find out more about Scottish film and TV security company Zion Security and some of the incredible productions they have supported to film in Scotland.

www.screen.scot/case-studies

INWARD PRODUCTION

£85m
GVA

1,440
FTEs

- **£51·3 million direct GVA**
  £33·7 million indirect / induced GVA
- **940 direct FTEs**
  500 indirect / induced FTEs
- Producers based outside of Scotland spent an estimated £165·3 million on the inward production of films and HETV programmes filmed on location or in studio facilities in Scotland in 2019
- This included £60·4 million in spending on FTR-supported films and £104·9 million on HETR-supported TV programmes

CASE STUDY

Find out more about Scottish film and TV vehicle hire company Driven Scotland and how inward investment has enabled them to grow.

www.screen.scot/case-studies

Producers based outside of Scotland — particularly those based outside the UK — made significant contributions to production activity within Scotland in 2019. In most cases, this inward production was supported by the Film Tax Relief (FTR) or High-end Tax Relief (HETR).

In some cases, projects also received funding from Screen Scotland's **Production Growth Fund (PGF)**. The fund aims to help grow Scotland's screen production sector, creating employment opportunities for Scottish crews, encouraging the use of production facilities, and providing significant opportunities for the professional development of producers based in Scotland.

The fund seeks to deliver a direct and significant economic benefit to Scotland by attracting large scale productions into the country, and maximising spend in Scotland. Examples include *Deadwater Fell*, *1917*, *Fast and Furious 9* and *Eurovision*.

The Production Growth Fund delivers an average economic impact that is 14 times the value of awards.

INDEPENDENT FILM PRODUCTION

£3·3m
GVA

- **£1·2 million direct GVA**
  £2·1 million indirect / induced GVA

60
FTEs

- **30 direct FTEs**
  30 indirect / induced FTEs

CASE STUDY

Find out how Scottish writer / director Raisah Ahmed got her start in the industry and more about her career so far.

www.screen.scot/case-studies

In addition to the TV programmes and films commissioned by PSBs and inward production supported by tax relief, data from Screen Scotland indicated that there were also several fiction and documentary films made with support from Screen Scotland's Film Development and Production Fund.

The fund supports the production of distinctive and high-quality feature films that promote Scotland's culture, creativity and diversity. Crucially, the fund also offers support to projects that enable artists and filmmakers to take risks creatively.

Recipients of the fund in 2019 include *Nobody Has to Know*, a Belgian / Scottish co-production from Glasgow's barry crerar which premiered at Toronto International Film Festival 2021 and *Falling for Figaro*, from Glasgow-based Black Camel Pictures starring Joanna Lumley, Danielle Macdonald and Hugh Skinner which started streaming on Netflix in October 2021.

***Scheme Birds*, courtesy of Sisyfos Film Production**

***The Fabric of You*, courtesy of Screen Scotland**

ANIMATION, VFX & POST-PRODUCTION

£29·4m
GVA

530
FTEs

- **£19·1 million direct GVA**
  £10·3 million indirect / induced GVA
- **360 direct FTEs**
  170 indirect / induced FTEs
- Scotland-based producers reported £28 million in turnover earned from animation, VFX and post-production work

CASE STUDY

Learn more about Stirling-based animation production company Wild Child Animation and the recent growth of Scotland's animation sector.

www.screen.scot/case-studies

Scotland is home to several production companies that focus on the creation of animation content as well as studios engaged in VFX (Visual Effects) and post-production work.

Scotland's animation sector produces high quality work in a range of formats and boasts creative success stories, including several BAFTA winning productions. As well as creating animated films, shorts and TV, animators also play a vital role in the VFX industry, gaming, app development and online services. Axis Studios, Interference Pattern, Plum Films, TG Entertainment and Wild Child Animation are among Scotland's leading animation companies.

The VFX sector is a significant part of the production process in both film and TV, with its talented workforce combining technical and creative skills. It is also now intrinsic to most feature films and to many TV dramas. Post-production companies bring together creativity and innovation in their quality work, notable among them companies such as Arteus, Blazing Griffin, Edit 123, Freakworks and Serious Facilities as well as the BBC's facility within its Glasgow base.

OTHER AUDIO VISUAL PRODUCTION

£1·7m
GVA

50
FTEs

- **£1 million direct GVA**
  £0·7 million indirect / induced GVA
- **20 direct FTEs**
  30 indirect / induced FTEs
- Producers reported a total of £4·8 million spent on these other forms of live action audiovisual production

Other audio visual production covers the creation of advertising and other live action screen content, such as corporate or educational content.

The sector covers video production, lighting, editing, camera operation and sound, television production and motion graphics, and provides the crucial technological, sound and visual support for various corporations. The figures shown here, however, are likely to be an underestimate as Screen Scotland's relationship with the purely corporate sector is limited.


TV FESTIVAL

Guilt, courtesy of BBC

PUBLIC SERVICE BROADCASTERS

£184·7m
GVA

2,790
FTEs

- £113·4 million direct GVA
  £71·3 million indirect / induced GVA
- 1,720 direct FTEs
  1,070 indirect / induced FTEs
- £257·7 m Gross Operating figures for all of the PSBs
- PSBs spent an estimated £196·6 million on content production in Scotland in 2019. This included PSBs' spending on news, current affairs, sports, children's, arts, entertainment and factual entertainment programming.

PSBs (Public Service Broadcasters) represent the core source of demand, financing and commissioning of TV programmes and documentary films made by Scotland-based producers.

PSBs output covers drama, documentary, specialist factual, factual entertainment and entertainment programmes, as well as output that is made in-house by the PSBs themselves such as news (including dedicated regional news) or current affairs programmes. As well as reaching wide audiences domestically, the high-quality content of PSBs offers the opportunity to generate international recognition and boost cultural status.

PSBs are highly valued, offer distinct and essential services, and bring significant benefits to audiences, to the production sector, and the wider Scottish economy. PSBs are crucial to the development of the production sector and the creative industries, attracting investment while also development talent and skills.

Much of the television production in Scotland is enabled by the fact that it has an ecosystem of PSBs based locally, such as BBC Scotland and BBC Alba. Channel 4 also has a Hub in Scotland. As the home to STV, Scotland is the only country in the UK with its own national 'affiliate' of ITV.

TV BROADCAST

£51·8m
GVA

710
FTEs

- **£31·6 million in GVA generated directly within the TV broadcasting sub-sector — namely at the broadcasters themselves**
  £20·2 million indirect / induced GVA
- **420 direct FTEs**
  290 indirect / induced FTEs
- **£61·1 million spent on broadcasting support operations**

In Scotland, households can access PSB (Public Service Broadcasters) TV content broadcast by the BBC (network), ITV, Channel 4, Channel 5 and S4C; ITV programming is contained within the STV schedule and STV Player in Scotland outside of the Borders.

Scotland is also home to BBC Scotland and BBC Alba, as well as opt-outs for STV programming on the Channel 3 service operated by ITV in other parts of the UK including the Scottish Borders. BBC Scotland and BBC Alba have channels within the BBC iPlayer.

BBC Scotland and STV have the largest operations in Scotland, and along with BBC Alba account for the majority of broadcasting support operations in Scotland, including terrestrial and digital operations.

In 2019 the publicly owned PSBs were core to the financing and commissioning of television programmes and many films made by Scotland-based producers. PSBs generate significant economic impact through content production and spent an estimated £196·6 million on content production in Scotland in 2019. They generated a further £61·1 million impact through their operating expenditures, such as transmission, sales and marketing, administration and other overheads. Providing a combined Gross Operating Expenditure in Scotland of £257·7 million in 2019.

At a UK network level — not including local spend via BBC Scotland and BBC Alba — the BBC and C4 together account for almost 54% of all content spend by PSBs in Scotland. Between them the BBC television services and C4 accounted for 87% of all PSB expenditure in Scotland in 2019.

The Victim, courtesy of BBC

Black & Scottish, courtesy of BBC Scotland / Tern TV / Create Anything

DISTRIBUTION

£5m
GVA

- £3 million direct
  £2 million indirect / induced GVA

60
FTEs

- 30 direct FTEs
  30 indirect / induced FTEs
- £8 million in turnover

The distribution segment of the screen sector value chain encompasses the business activities associated with the acquisition, licensing and sale of audiovisual content. Distribution companies can be distinct from production companies, for example Park Circus, Cosmic Cat Films and All the Anime (Anime Limited) in Scotland.

In some cases, production companies themselves operate distribution / rights exploitation arms to oversee the monetisation of the exhibition and secondary market broadcast rights they hold in their produced content or to manage their share of revenue remitted by the distributors from their content.

In Scotland, production companies such as Friel Kean Films, Hopscotch Films, Raise the Roof Productions and Synchronicity Films significant distribution / rights exploitation operations in 2019.

EXHIBTION & FESTIVALS

£88·9m
GVA

2,000
FTEs

- £59·6 million direct GVA
  £29·2 million indirect / induced GVA
- 1,420 direct FTEs
  580 indirect / induced FTEs
- 14 million admissions and £99·8 million in box office revenue
- 178,000 audience across over 30 film festivals

Belmont Filmhouse Audience © Abbie Dobson

Screen Machine in Glencoe with Buachaille Etive Mòr

CINEMA & EXHIBITION

£81·5m
GVA

1,800
FTEs

- **£55·7 million direct GVA**
  £25·8 million indirect / induced GVA
- **1,290 direct FTEs**
  510 indirect / induced FTEs
- Cinemas in Scotland earned a total box office revenue of £99·8 million (including VAT) in 2019
- This box office revenue was earned from an estimated 14 million admissions
- Cinemas earned £0·64 in other revenue for every £1·00 of box office revenue
- Cinemas in Scotland earned £136·4 million in total revenue (excluding VAT) in 2019

In Scotland, and across UK, the cinema sub-sector is dominated by the major multiplex chains — Cineworld, Odeon and Vue — which collectively held 70% of the market in 2019.

While these cinema chains are domiciled outside of Scotland, they still have a significant economic impact within Scotland. Cinema chains maintain large workforces and it is largely through this employment and employment income that these cinema chains contribute to the Scottish economy. The cinema sub-sector also earns revenue from ticket sales, food and beverage sales, advertising and other sources.

Screen Scotland recognises that film exhibition is vital to Scotland's film culture, providing a unique and focused experience for audiences to engage with film. In 2019, Screen Scotland launched the £1·6 million **Cinema Equipment Fund** to enable 46 community cinemas and touring cinema operators to upgrade or install cinema screening equipment. This, in turn, increased access to cinema and encouraged resilience for film exhibitors based in Scotland. Successful applicants to the fund included Mareel in Shetland, West Side Cinema in Orkney and The Pavilion Cinema in Galashiels.

Screen Scotland also supports Screen Machine, an 80-seat mobile cinema which brings the latest films to remote and rural areas of Scotland. It is the only full time, self-contained digital mobile cinema in the UK. From 2020 onwards Screen Scotland, with funding from the Scottish Government, provided significant levels of support to sustain cultural and community cinemas across Scotland.

FILM FESTIVALS

£7·4m
GVA

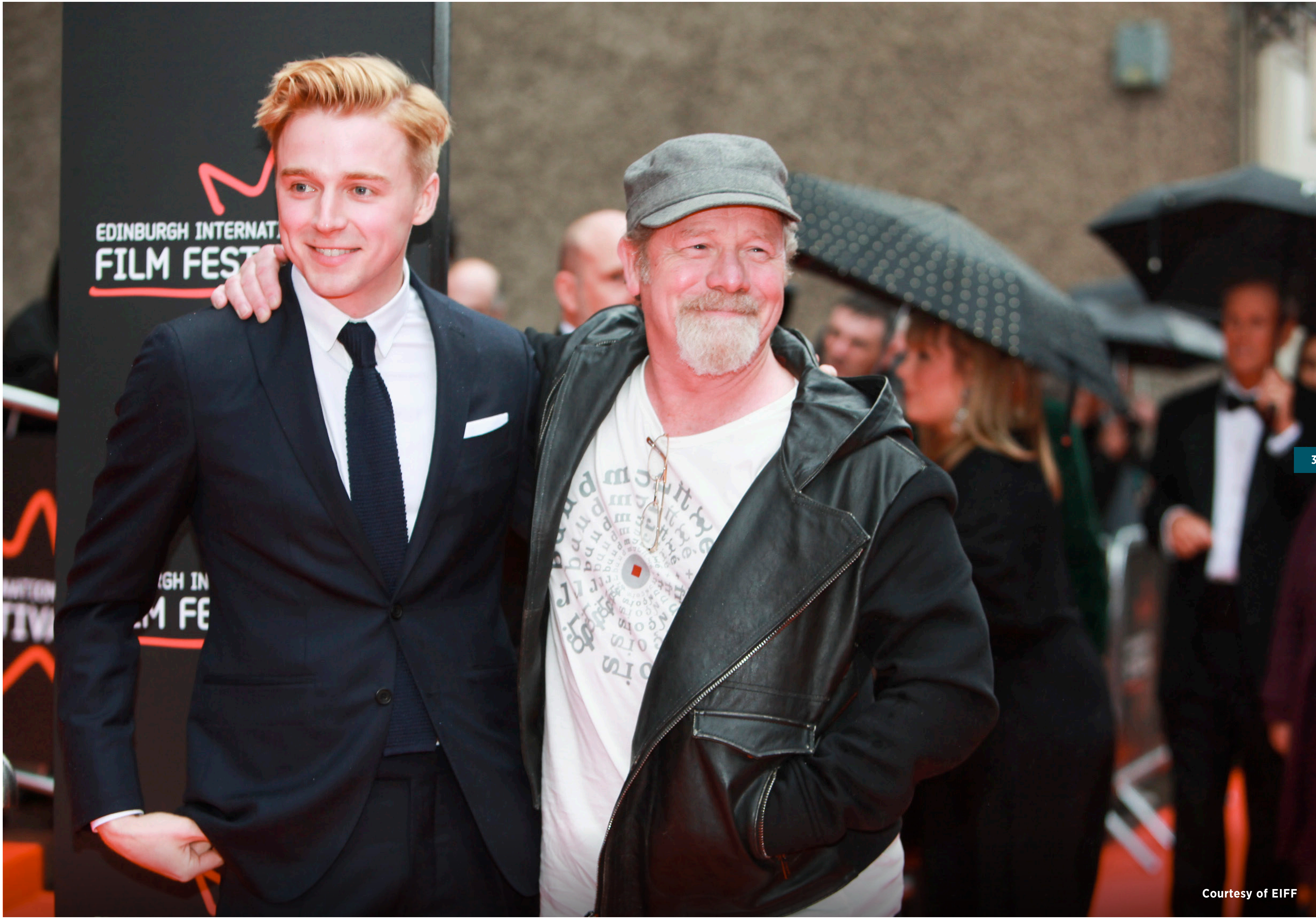
200
FTEs

- **£3·9 million direct GVA**
  £3·5 million indirect / induced GVA
- **130 direct FTEs**
  70 indirect / induced FTEs
- Core attendance: 177,624
- Unique visitors: 40,244 (Scotland: 33,322; rUK: 4,901; Overseas: 2,022)
- Gross visitor spending: £4·4 million — (Scotland: £0·9 million; rUK: £1·8 million; Overseas: £1·7 million)
- These films festivals made operating expenditures of nearly £4·3 million
- Festival attendees and media delegates spent an estimated £4·7 million in Scotland outside of festival venues

Film and TV festivals contribute to economic activity in several different respects. The operation of the festival itself generates income and employment as the festivals hire screens, produce festival events and an industry development programmes, and employ people to run such screenings and events.

Many festivals attract attendees and delegates from outside Scotland and thereby stimulate tourism spending on accommodation, food and other retail outside of festival venues. Finally, some festivals that also operate as markets can help local producers increase the sales of their content or secure financing for future projects.

Scotland currently has two major international festivals: the Edinburgh International Film Festival (EIFF) and the Glasgow Film Festival. Prior to the Covid-19 pandemic, Scotland also hosted just over 30 film festivals on an annual basis. Such festivals help promote the experience of watching films together, raise the profile of film overall and play an important role in bringing stories to audiences. Some, such as Hebrides International Film Festival, Sea Change Film Festival, Hippodrome Silent Film Festival and Fort William Mountain Film Festival, also offer engagement with film in locations that have limited access to cinema.



Courtesy of EIFF

Outlander, courtesy of Sony Entertainment

CASE STUDY

Find out more about the impact of film and TV on tourism in Scotland.

www.screen.scot/case-studies

SCREEN TOURISM

£55m
GVA

1,220
FTEs

- **£35·9 million in direct GVA within the accommodation, food and beverage, transport, tour operators, retail, and culture and entertainment industries**
  £19·1 million indirect / induced GVA
- **910 direct FTEs**
  310 indirect / induced FTEs
- **656,000 overnight screen tourists in 2019**
- **£316·5 million total spending, of which £64·9 million was attributable to screen tourism activities**
- **Approximately half of Scotland's overnight screen tourists were from Scotland or elsewhere in the UK — and half were from overseas**

The economic contribution of the screen sector is not confined to the content value chain. Once films and TV programmes are released, they can continue to generate economic benefits for the countries and regions that hosted production or were the settings for the stories depicted in film or TV.

Screen tourism is one such industry that lies outside the screen content value chain but still benefits from the creation of screen content, which ultimately generates demand for the products and services offered by these industries.

Film and TV plays a significant part in attracting for visitors to Scotland, with tourists frequently citing depictions of landscapes and heritage on screen as their inspiration for travelling. In recent years, the television series *Outlander* has garnered a strong audience following and significant interest among tourists visiting Scotland. It likely led to an additional one million visits to 23 visits to historic sites since 2013, including Linlithgow Palace and Blackness Castle, and accounted for 54% of interest in screen tourism in Scotland in 2019. In addition to *Outlander*, several other popular films and TV series, including *Harry Potter*, *Skyfall*, *Mary Queen of Scots* and *Outlaw King* have been partially filmed in Scotland and subsequently generated significant tourist interest.

EDUCATION & SKILLS DEVELOPMENT

£51·8m
GVA

1,170
FTEs

- £42 million direct GVA
  £9·8 million indirect / induced GVA
- 1,000 FTEs of direct employment
  170 indirect / induced FTEs
- £54·1 million annual spending on the provision of film, TV and broadcast education and training

Screen Education Edinburgh

SUPPORT ECOSYSTEM

In Scotland there is an evolving education and skills development ecosystem in place that operates at three main junctures along the talent pipeline for film and TV:

Exposure

Introduces film and TV to young people as a potential career (pre-career);

Entry

Further education (FE), higher education (HE) and independent organisations provide academic or vocational courses, or experience to educate and prepare individuals for entry into the screen sector;

Evolution

A network of additional training services that support the continued development of screen sector workers, as they grow and advance their careers within their profession, as well as talent development opportunities for creatives to develop, especially early in their careers.

The support ecosystem is made up of public, private and not-for-profit organisations that largely operate in a complementary way endeavouring to ensure services are available to support the breadth of screen sector occupations as well as the geography of Scotland. Most of this provision originates from within Scotland but some of this is provided by UK-wide organisations and other provision is exported from Scotland to the rest of the UK.

SCREEN SCOTLAND SUPPORT

Screen Scotland partners with Scottish Enterprise, Highlands and Islands Enterprise, Skills Development Scotland, and the Scottish Funding Council as well as Glasgow City Council in funding, developing, and growing the screen sector in Scotland.

Out of this role, Screen Scotland has several objectives that relate to education and skills development:

- Improving and expanding the provision of moving-image education in every context, increasing its reach, depth and inclusivity.
- Developing Scotland's screen talent and promoting that talent in domestic and international markets.
- Improving employment opportunities in the screen sector through increased and coordinated opportunities for work-based learning, training, and development.

This is funded by the Scottish Government through grant-in-aid and The National Lottery. Furthermore, BFI and ScreenSkills — each of which has a UK-wide remit — also operate within Scotland as part of the education and skills development ecosystem for the screen sector. Lastly, there is the education sub-sector which provides FE and HE qualifications for entry into the screen sector.

CASE STUDY

Learn more about key film and TV roles and hear from some of Scotland's experienced crew — including a scene painter and construction manager — and how they have grown their careers in Scotland.

www.screen.scot/case-studies

HIGHER & FURTHER EDUCATION

1,898
HE students enrolled in film, TV or broadcast courses

3,809
Students enrolled in film, TV or broadcast courses at FE colleges

£12,400
Average spend by the sector per learner

£6,500
Average spend by the sector per learner

£23·5m
Total HE expenditures

£24·8m
Total FE expenditures

There are a number of key institutions, such as Forth Valley College, North College Lanarkshire and Fife College, that provide courses for film, television and broadcast, providing students with opportunities to engage with education provision for the screen industries.

Courses offer students the opportunity to gain the creative and technical skills, alongside the knowledge of changing technologies, required for working in the Film and TV industries.

Beyond the estimates of the employment and GVA generated by just the ‘delivery’ of education and skills development programmes, screen sector education and skills development make a longer-term contribution to the economy.

There is an increase in employment opportunities and earnings that graduates attribute to their participation in screen education or skills development, as well increased levels of employment and GVA within the economy that can be linked to the intellectual property (*ie* screen content) developed, created or commercialised by graduates — either individually or through the formation of companies.

PRE-CAREER & IN-CAREER SKILLS DEVELOPMENT

There is a vast and growing range of jobs in the screen industries and Scotland needs more skilled people to fill them, at all levels, in order to meet the challenge of increasing volumes of screen production activity, as well as roles outside the production sector, in exhibition, distribution, education, and other fields.

Through National Lottery and grant-in-aid funding from the Scottish Government, Screen Scotland funds three strands of pre-career and in-career skills development:

- **Film education** for improving and expanding the provision of film and moving-image education in every context, increasing its reach, depth and inclusivity.
- **Talent development** for developing Scotland's screen talent (as well as promoting Scotland's talent in domestic and international markets).
- **Skills development** for improving employment opportunities in the sector through increased and coordinated training.

Screen Scotland supports the BFI Film Academy, an annual hands-on filmmaking programme for 16–19-year-olds across the UK aiming to know more about film and how to make a career in the screen industries.

This course builds knowledge and skills and shows the pathways into industry for talented and committed young people, supporting them to study at Scotland's film schools or make their first steps into the film, television and creative industries workplace. The BFI Academy is delivered in partnership with GMAC Film, Screen Education Edinburgh, Station House Media Unit and Screen Argyll.

Screen Scotland also provides support through talent development programmes such as Short Circuit, DocScene, FormatLab, and skills development programmes including the Outlander Trainee Scheme, rad Scotland, PACT Indie Diversity Scheme and ScreenNETs.

£5·9m

Funding and income for screen sector skills development programmes in Scotland in 2019

£642,000

Screen Scotland Film Education

£883,000

Screen Scotland Talent Development

£984,000

Screen Scotland Skills

£2·5m

Total for Screen Scotland

1917, courtesy of Amblin Partners

CASE STUDY

Find out more about how previous participants of the Outlander Trainee Scheme are developing their careers in Scotland.

www.screen.scot/case-studies

CASE STUDY

Find out more about Amazon's investment in Scotland's film and TV sector and exciting upcoming productions.

www.screen.scot/case-studies

Aerial view of FirstStage Studios courtesy of Forth Ports

INFRASTRUCTURE

19

Studio and build space facilities available

234,000

Square feet of stage space available for film and TV production across four facilities

£5m–10m

Potential to attract in annual film and TV production spending for every 10,000 square feet of new state of the art stage space

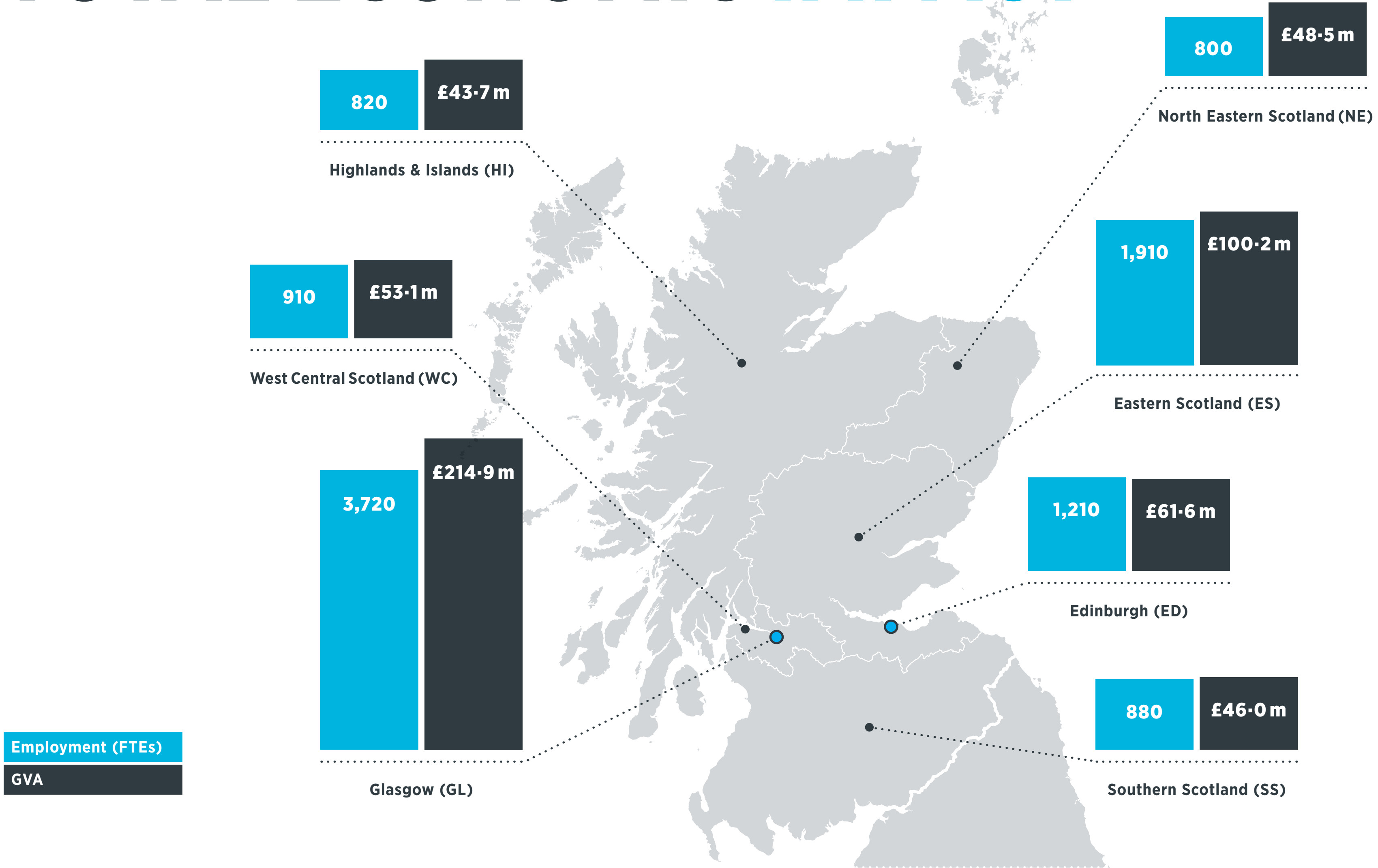
Within the screen sector, infrastructure comprises the studio facilities that are used by producers of films, TV programmes, TV commercials and other audiovisual content. Scotland currently has seven studio facilities or build spaces of over 10,000 square feet and 12 build spaces of under 10,000 square feet.

Among these 19 facilities, six provide soundstages with suitable height available to film and TV producers: BBC Dumbarton, Wardpark Studios, Pyramids Business Park, FirstStage Studios, BBC Pacific Quay and Studio Alba. Screen Scotland takes an active role in securing or expanding key sites for studio development.

From an economic impact perspective, the ongoing use of studio facilities is captured as an indirect impact of production. Once opened for use, every 10,000 square feet of state-of-the-art stage space can accommodate £5 million to £10 million in annual production spending and thereby generate employment for 50 to 100 FTEs of cast and crew, plus additional employment at production services suppliers and other local suppliers.

The infrastructure sub-sector, namely studio facilities, could also be considered a beneficiary of the impact of the screen content value chain. In particular, rising levels of screen production generate demand for the construction of new studio facilities — thereby creating a spillover for the construction and property development industries.

TOTAL ECONOMIC IMPACT



Further information

View interactive visualisations of all the data from the full report:

www.screen.scot/research/economic-value-of-the-screen-sector-in-scotland

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