SUMMARY REPORT

SCREEN SCOTLAND
SGRÌN ALBA

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THE ECONOMIC VALUE OF THE SCREEN SECTOR IN SCOTLAND IN 2021

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

Screen Scotland 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.

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FOREWORD

Higher levels of film and TV production in Scotland helped drive Scotland's overall screen sector to higher levels of employment and gross value added in 2021

The total value of film and HETV production activity in Scotland more than doubled between 2019 and 2021, driving higher levels of employment and gross value added (GVA) impact for the screen sector within Scotland's economy in 2021, compared to 2019.

In total, an estimated £617.4 million was spent on the production of film, TV and other audiovisual content in Scotland in 2021, compared to £398.6 million in 2019, and increase of 55% compared to 2019. This included content made by Scotland-based producers, producers based outside of Scotland filming in Scotland and PSBs.

Over 80% of the net increase in production spending between 2019 and 2021 (£218.8 million) was driven by film and HETV production supported by UK tax relief, but also by higher levels of Public Service Broadcaster (PSB) commissioned TV programming made without tax reliefs. Inward film and HETV production increased by 110%, from £165.3 million in 2019 to £347.4 million in 2021. PSB-commissioned content increased from £196.6 million to £223.3 million over that period.

The sector development and strategic support work undertaken by Screen Scotland and the Scottish Government since 2018 either delivered or supported the delivery of much of the capacity necessary to meet the increase in demand. The opening of new or expanded studio facilities, particularly FirstStage Studios in Edinburgh and The Pyramids in West Lothian, enabled Amazon's The Rig, Good Omens 2 and Anansi Boys to film their entire production in Scotland, filming on location and inside each studio. These studio facilities have made Scotland an even more attractive place to film, opening just in time to catch the global post-pandemic boom in production.

Screen Scotland's participation in the Screen Sector Taskforce, led by the British Film Institute (BFI), enabled early agreement of safe-work protocols with the UK and Scottish Governments and the restart of film and high-end TV (HETV) production in Scotland from the late winter of 2020. Investment in skills development work – again by Screen Scotland in partnership with broadcasters, video-on-demand (VOD) platforms and production companies – enabled higher investment in crew training across 2021, giving inward investment producers' increased confidence in Scotland's ability to meet demand. The *Outlander* Training Programme, Screen NETS and the *Good Omens* Trainee Scheme (supported by Amazon Studios and BBC Studios) were among the training initiatives co-funded by Screen Scotland in that year.

On a like-for-like basis (i.e. excluding the 'other TV production' segment, which was not included in the 2019 estimates), employment in Scotland's screen sector increased by 5.6%, from 10,280 full-time equivalents (FTEs) in 2019 to 10,860 FTEs in 2021, while GVA in Scotland's screen sector overall increased by 9.6% Between 2019 and 2021, Scotland's production and development sub-sector delivered a 38% increase in employment, alongside a 39% increase in GVA, on a like-for-like basis.

With the higher levels of production and development activity observed in 2021, these recoveries could continue to propel Scotland's screen sector to higher levels of employment and GVA in 2023 if investment in production, skills, infrastructure and talent development is sustained at 2021/22 levels and continues to meet the increased demand.

EXPLANATION OF TERMS

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

Gross Value-Added impact (GVA) 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.

Full Time Equivalent impact (FTE) 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.

High-End Television (HETV) is defined as productions that cost more than £1m per broadcast hour to produce.

DEVELOPMENT & PRODUCTION

£617.4m
in production expenditures

£442.1m
GVA

7,150
FTEs

- **4,570 of direct employment in cast, crew & other creative roles within the production industry**
- **7,150 FTEs total employment impact. Including indirect & induced impacts.**

In Scotland's screen sector, the development and production of screen content was the greatest single source of GVA £442.1m GVA.

Over 80% of the net increase in production spending between 2019 & 2021 (£218.8m) was due to the tremendous growth in inward film and HETV production. It more than doubled from £165.3m to £347.4m, as Scotland attracted several big-budget films (*Batgirl, Indiana Jones and the Dial of Destiny*) & HETV programmes (*The Rig*, *Good Omens*, *Anansi Boys*).

	2019	2021
PSB content	£196.6m	£223.3m
Inward film and HETV production	165.3m	£347.4m
Independent film production	£3.9m	£7.6m
Other television production	--	£6.0m
Animation, VFX and post-production	£28.0m	£27.1m
Other live action audio-visual content	£4.8m	£6.0m
Total	**£389.6m**	**£617.4m**

Tetris / Apple Studios


GIRL / barry crerar

DEVELOPMENT

£13.5m
GVA

270
FTEs

- An estimated total of £13.5m was spent on the development of films and TV programmes in Scotland in 2021
- Total development funding increased by £2.3m or 21% compared to 2019, due to higher levels of reported self-funding and higher levels of funding from Broadcasters
- The total spend included not only Screen Scotland's £1.6m of funding, but also self-funding from production companies (£8.9m), funding from Broadcasters (£2.1m), funding from distributors (£0.5m), funding from BFI (£0.1m) & other sources (£0.3m).

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

In the film and TV sector, development includes the research and writing that goes into creating ideas for new films and TV programmes and then writing the outlines, treatments, pitch decks and screenplays for those productions. TV executive producers, film & television producers, development executives and screenwriters often lead the development process and once they have a programme proposal, treatment or screenplay, they find a broadcaster, public funder or distributor/sales agent (in the case of films) to financially support the production of the project.

In Scotland, public funding is available to producers and screenwriters to undertake development, especially if they are unable to self-fund the development or obtain development funding from broadcasters or distributors. With PSB development and production budgets under increasing pressure and production an increasingly marginal business for independent producers, this public funding is often essential in 'priming the pump', enabling producers to take forward new projects & sustain their growth.

Screen Scotland provides grants to filmmakers and other creators, resident in Scotland, for the development of feature films or documentaries through the Film Development & Production Fund. Producers who would like to develop TV projects can access project or slate funding through the Broadcast Content Fund.

CASE STUDY

Find out more about Glasgow-based screenwriter Maryam Hamidi, her route into the screen industry and her upcoming work

www.screen.scot/case-studies

PRODUCTION

£617.4m
GVA

7,152
FTEs

- **An estimated total of £617.4 million was spent on the production of film, TV and other audiovisual content in Scotland in 2021.**
- **Total production funding increased by an estimated £218.8m or 55% compared to 2019.**
- **This included inward investment film and HETV production, which increased by 110%, from £165.3 million in 2019 to £347.4 million in 2021.**

In total, an estimated £617.4m was spent on the production of film, TV and other audiovisual content in Scotland in 2021. This included content made by Scotland-based producers, producers based outside of Scotland filming in Scotland and Public Service Broadcasters (PSBs) and was up 55% compared to 2019.

Over 80% of the net increase in production spending between 2019 & 2021 (£218.8m) was due to the tremendous growth in inward film and HETV production. It more than doubled from £165.3m to £347.4m, as Scotland attracted the filming of several big-budget films (*Batgirl, Indiana Jones and the Dial of Destiny*) & HETV programmes (*The Rig, Good Omens, Anansi Boys*).

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

Alongside these Scotland-based independent companies, several leading UK production companies based outside Scotland, such as World Productions, Tinopolis and Objective Media Group, maintain a business base in Scotland. Scotland also hosts production units for a number of broadcaster-owned production companies, including BBC Studios and STV Studios.

In recent years, these production companies have been responsible for making a variety of scripted and unscripted content in Scotland, including *Mayflies, Crime, Girl, Silent Roar, Trauma, Annika & Highland Cops*.

Float / BBC and Black Camel Pictures

CASE STUDY

Find out more about the makers of *Float*, Glasgow-based independent production company Black Camel Pictures.

www.screen.scot/case-studies

The Rig / Prime Video

INWARD PRODUCTION

£173.5m
GVA

2,910
FTEs

- **£102.9m direct GVA**
  £43.6m indirect GVA,
  £26.9m induced GVA
- **1,880 FTEs**
  590 indirect FTEs
  440 induced FTEs
- **Producers based outside of Scotland spent an estimated £347.4m on inward production of films and HETV programmes filmed in studio facilities or on location in Scotland. On FTR-supported films, this included £117.7m in spending and £229.7m on HETR-supported TV programmes.**

Producers based outside of Scotland – particularly those based outside the UK – made significant contributions to production activity within Scotland. In most cases, this inward production was supported by the Film Tax Relief (FTR) or High-end Tax Relief (HETR). Some projects also received funding from Screen Scotland's Production Growth Fund (PGF).

In 2021, films such as *Batgirl* (which filmed in Scotland in 2021 before being shelved during post-production), *The Lost King, Man & Witch and Downton Abbey: A New Era* were filmed in Scotland, along with TV series such as the long-running *Outlander* (season 6), *Good Omens 2, The Rig* and *Anansi Boys*.

To estimate the total spending generated by inward film and HETV production in Scotland, data on the number of filming days was sourced from Screen Scotland's Screen Commission. These filming days were multiplied by a rate card developed for the BFI for average daily production spending for different types of film & HETV projects. These rate-card figures included estimates of spending on Scotland-based elements used on inward production, as well as elements based outside of Scotland.

The total value of film and HETV production activity in Scotland more than doubled between 2019 and 2021. This was due in large part to the opening of new or expanded studio facilities, particularly FirstStage Studios in Edinburgh, where *The Rig* and *Anansi Boys* were filmed. These new studio facilities have made Scotland an even more attractive place to film.

INDEPENDENT FILM PRODUCTION

£6.8m
GVA

110
FTEs

- £2.5m direct GVA
  £2.9m indirect GVA
  £1.4m induced GVA
- 50 direct FTEs
  40 indirect FTEs
  20 induced FTEs.

In addition to the TV programmes and films commissioned by PSBs and inward film, and HETV production supported by tax relief, data from Screen Scotland indicates that there were 12 independently produced fiction and documentary films made by Scotland-based producers in 2021* with support from Screen Scotland's Film Development & Production Fund.

These films, including *Silent Roar*, *Skint* & *Girl*, generated an **estimated £7.6m in production spending** in Scotland. Spending in Scotland on Independent film production practically doubled from £3.9m in 2019.

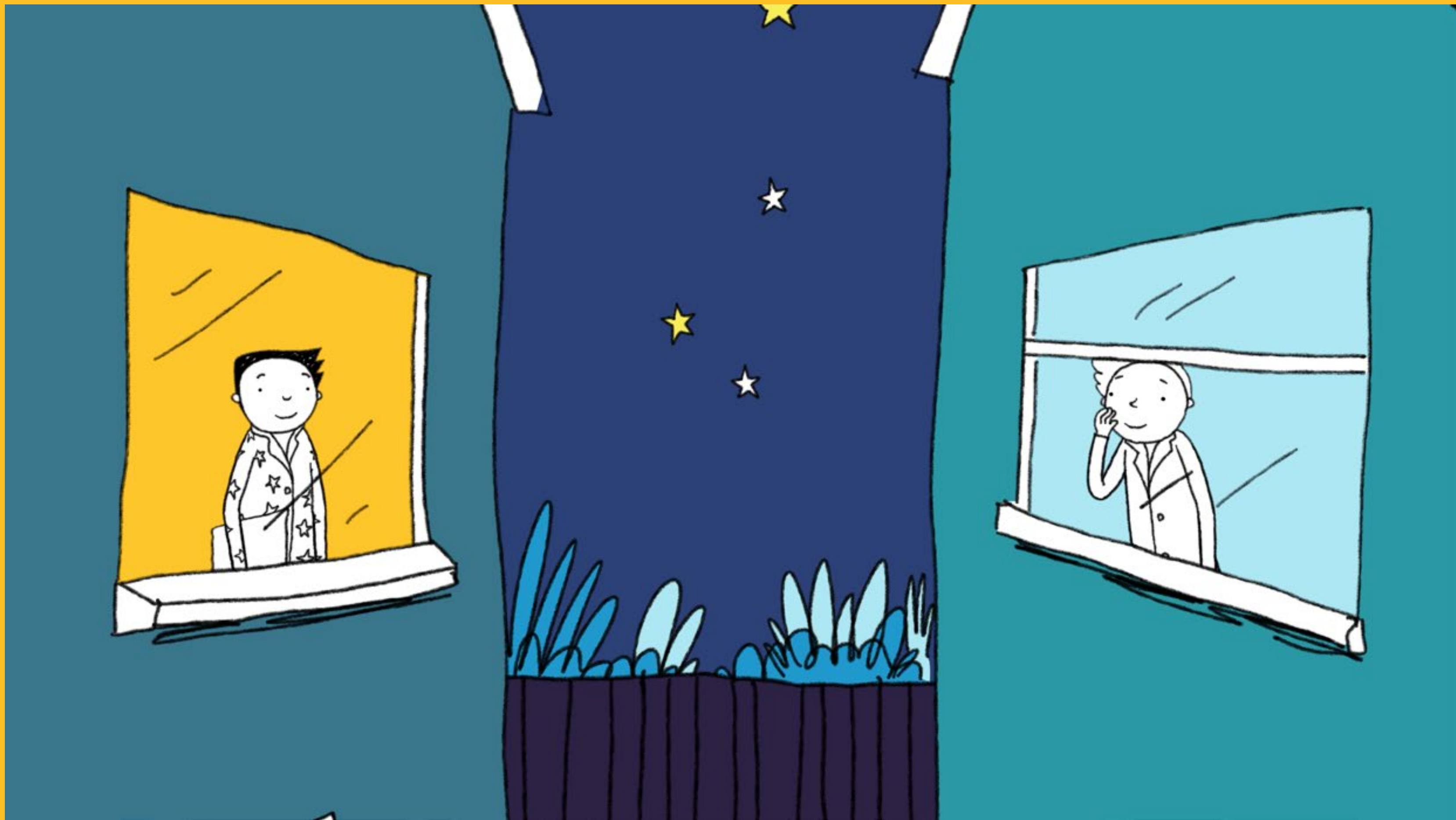
*(i.e. films that started principal photography in 2021)

CASE STUDY

Find out more about Edinburgh-based Director Paul Sng, making documentaries in Scotland and his work focussing on people who challenge the status quo

www.screen.scot/case-studies

Aftersun / MUBI



ANIMATION, VFX & POST-PRODUCTION

£28.2m
GVA

510
FTEs

- **£18.5m direct GVA**
  £5.9m indirect GVA
  £3.8m induced GVA
- **360 direct FTEs**
  90 indirect FTEs
  60 induced FTEs.

Scotland is home to several production companies that focus on the creation of animation content as well as studios engaged in VFX and post-production work. Axis Studios, Wild Child and TG Entertainment are among Scotland's leading animation companies. Notable post-production companies include Serious, Blazing Griffin, Edit 123 & Arteus, as well as the BBC's facility within its Glasgow base.

According to the survey research, the total value of animation, VFX and post-production work in Scotland was an estimated £27.1m in 2021 – most of which (£15.9m) was earned on a service basis for projects ultimately created by producers based outside of Scotland.

While the overall level of animation, VFX and post-production activity in Scotland was down by only 3% compared to 2019, there was a shift in more of this production being made for Scotland-based producers as opposed to service work for producers based outside of Scotland. Production for Scotland-based producers more than tripled between 2019 & 2021 to £11.3m, while service work was down by 36%.

OTHER AUDIO VISUAL PRODUCTION

£2.8m
GVA

50
FTES

- £1.0m direct GVA
  £1.2m indirect GVA
  £0.6m induced GVA
- 20 direct FTEs
  20 indirect FTEs
  10 induced FTEs
- Producers reported a total of £6.0m spent on these other forms of live action audio visual production, up from £4.8m in 2019.

Survey data and filming-days data supplied by Screen Scotland's Screen Commission were used to estimate the spending on the production of advertising and other live action screen content (e.g. corporate or educational content) in Scotland in 2021.

As Screen Scotland's relationship with the purely corporate sector is limited, this figure is likely an underestimate. Producers spent an estimated £6m on these other forms of live action audiovisual production in 2021, up from £4.8m in 2019.

CASE STUDY

Find out more about some of Scotland's cutting-edge production tech including cranes, robotic arms and virtual production facilities.

www.screen.scot/case-studies

PSB COMMISSIONED PRODUCTION

£213m
GVA

3,230
FTEs

- **£128.8m direct GVA**
  £51.8m indirect GVA
  £32.6m induced GVA
- **1,990 direct FTEs**
  700 indirect FTEs
  540 induced FTEs
- PSBs spent an estimated £223.3m on content production in Scotland in 2021. This included PSBs' spent on news, current affairs, sports, children's, arts, entertainment & factual entertainment programming.

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

By and large, this consists of TV programmes and films commissioned by PSBs from external, independent & so-called 'non-qualifying independent' producers (e.g. drama, documentary, specialist factual, factual entertainment and entertainment programmes) or made in-house by the PSBs (e.g. news & current affairs programmes).

In 2019, PSB content was the single largest type of film and TV production in Scotland (£196.6 million), followed closely by inward film and HETV production. However, the tremendous growth in the latter in 2021 meant that the total value of PSB content that year (£223.3m) trailed inward film and HETV production (£347.4m) for the first time.

TV BROADCAST

£53.4m
GVA

710
FTEs

- £31.4m direct GVA
  £14.1m indirect GVA
  £7.9m induced GVA
- PSBs spent an estimated £54.3m on broadcasting support operations.

In this section, we consider the economic impact generated by the balance of PSBs' operating expenditures: that is, their spending on broadcasting support operations such as transmission infrastructure, sales & marketing, administration, and other overhead expenses.

As with the rest of the UK, households in Scotland can access PSB TV content broadcast by the BBC (network), ITV, Channel 4, Channel 5 & S4C; however, ITV programming is rebroadcast by STV within Scotland.

Scotland is also home to BBC Scotland and BBC Alba, as well as opt-outs on the Channel 3 service operated by ITV for STV programming. BBC Scotland and STV have the largest operations in Scotland, and along with BBC Alba account for the broadcasting support operations in Scotland, including terrestrial & digital operations.

CASE STUDY

Find out more about the Scottish Documentary Institute's Bridging the Gap scheme and how it supports documentary makers in Scotland

www.screen.scot/case-studies

Peaky Blinders filmed on location in Portsoy, Aberdeenshire / BBC

SALES & DISTRIBUTION

£9.2m
GVA

60
FTEs

- £7.2m direct GVA
- 30 direct FTEs
- £16.3m in turnover.

The sales and distribution segment of the screen sector value chain encompasses the business activities associated with the acquisition, licensing and sale of audiovisual content. Distribution companies are often distinct from production companies, for example, Park Circus, Conic, Cosmic Cat & Anime Limited in Scotland.

In some cases, production companies will operate distribution themselves to oversee the monetisation of the exhibition and broadcast rights they hold in their produced content, or to reach audiences when the market interest dictates they handle distribution directly.

In Scotland, production companies such as STV Studios, Raise the Roof Productions, Firecrest Films, Synchronicity Films, Hopscotch Films, Two Rivers Media & Friel Kean Films maintained significant distribution activity in 2021.

EXHIBITIONS: CINEMA & FESTIVALS

£41.9m
GVA

1,390
FTEs

- £29.3m direct GVA
- 1,160 direct FTEs
- 30,000+ in person and online audience across 16 film festivals
- £6.2m admissions and £45.7m in box office revenue.

The COVID-19 pandemic led to the temporary closure of cinemas in the UK in March 2020. While cinemas in the UK did reopen to the public in August 2020, subsequent lockdowns, social distancing restrictions on audience capacity and the general public's avoidance of indoor public spaces meant that the box office remained well below pre-pandemic levels even in 2021.

The UK box office totalled £542m in 2021, 57% below the 2019 box office of £1,254m. Cinema admissions in the UK did recover further in 2022, rising to £904m – but were still 28% lower than in 2019.

The UK's cinema market 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. Scotland also has a significant independent cinema sector operating as small and medium-sized enterprises. Together they are a significant employer in the sector and driver of economic activity in the communities – often small towns – in which they are based.


cinema

CINEMA

£39.7m
GVA

1,320
FTEs

- **£28.3m direct GVA**
  £5.9m indirect GVA
  £5.4m induced GVA
- **1,120 direct FTEs**
  110 indirect FTEs
  90 induced FTEs
- **£45.7m of total box office revenue**
- **£6.2m admissions**
  £65.2m total revenue.

According to data from Comscore and certain cinemas and arts venues that do not report to Comscore, cinemas in Scotland earned total box office revenue of £45.7m in 2021. Box office and admissions data for the entire UK published by the BFI indicate that this box office revenue was earned from an estimated 6.2m admissions.

Notably, the recovery in cinema box office was slightly faster in Scotland compared to the overall UK. In 2021, Scotland's cinema box office (£45.7m) had recovered to 46% of its 2019 level (£99.8m). Across the entire UK, the cinema box office in 2021 (£542m) had recovered to 43% of its 2019 level (£1.254m).

FILM FESTIVALS

£2.3m
GVA

70
FTEs

- £1m direct GVA
  £0.8m indirect GVA
  £0.4m induced GVA
- 40 direct FTEs
  20 indirect FTEs
  10 induced FTEs
- 31,500 core physical audience
- 6,300 unique physical visitors
- Festival attendees & media delegates spent £575,000 outside of festival venues
- Film festivals spent £2.1m operating expenditures.

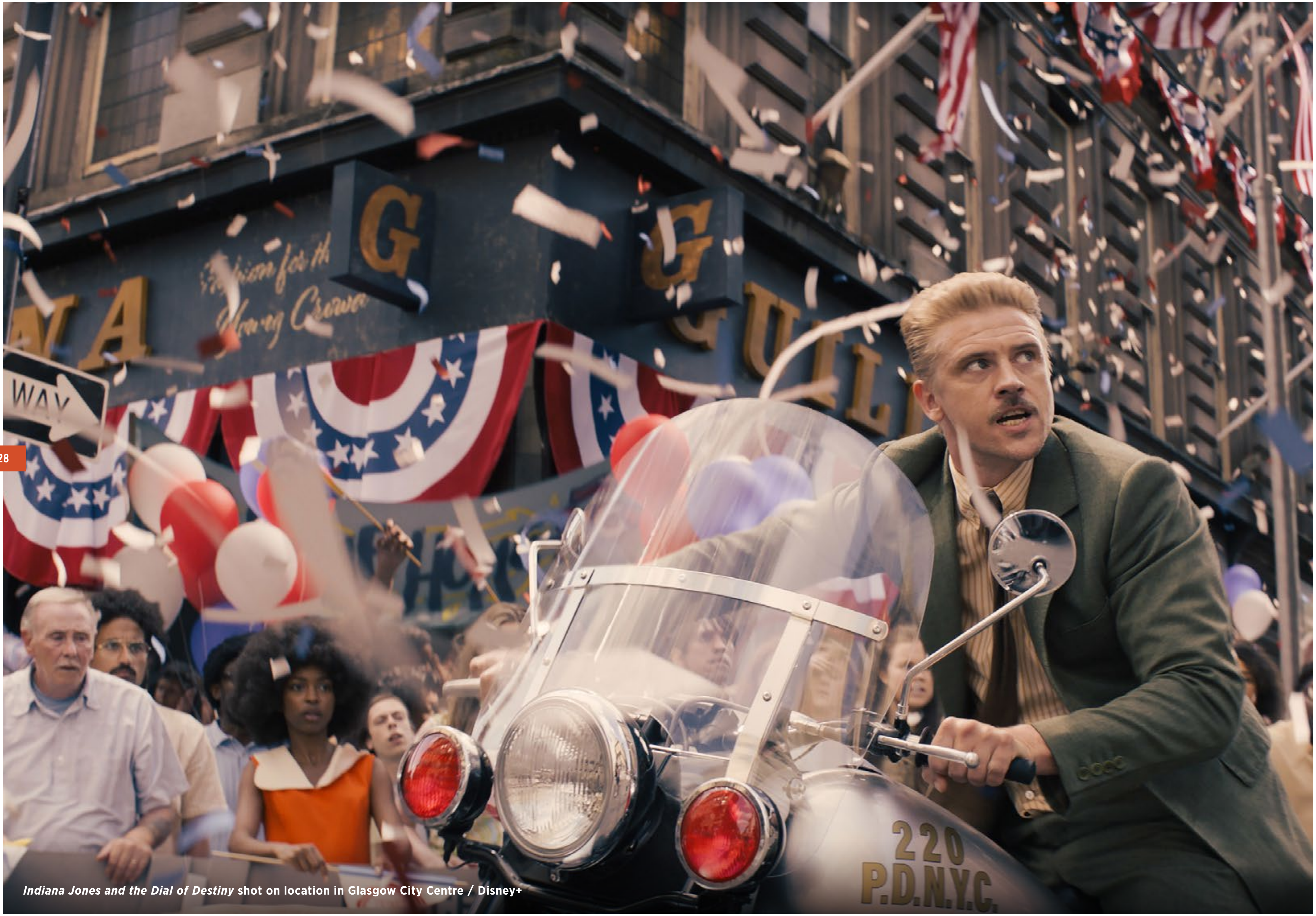
Film & TV festivals contribute to economic activity in several different respects. The operation of the festival itself generates income and employment as the festivals hire screens, produce festival events & industry development programmes, and employ people to run the screenings and events. Many festivals attract attendees and delegates from outside Scotland and thereby stimulate tourism spending on accommodation, meals 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.

Prior to the COVID-19 pandemic, Scotland also hosted approximately 30 film festivals on an annual basis. During the Covid-19 pandemic, many of these film festivals switched to online-only or hybrid models, which allowed audiences to enjoy screenings in person or online. Some these festivals, however, did cease to operate during the pandemic.

In 2021, Scotland hosted two major international festivals: the Edinburgh International Film Festival (EIFF) and the Glasgow Film Festival. Sixteen other film festivals received funding from Screen Scotland, which allowed them to operate on an online-only or hybrid model in 2021.

Although attendance, and visitor & media delegate spending at Scotland's film festivals was down significantly in 2021, compared to 2019, all indications are that in-person festival attendance globally will fully recover – as with most international travel. In 2023 and subsequent years, the economic contribution from Scotland's film festivals is likely to recover to its 2019 levels.

Adura Onashile, Director of ***GIRL*** at Glasgow Film Festival / Amy Muir



Indiana Jones and the Dial of Destiny **shot on location in Glasgow City Centre / Disney+**

SCREEN TOURISM

£11.7m
GVA

310
FTEs

- **£8.0m Direct GVA**
- **£2.1m indirect GVA**
- **£1.6m induced GVA**
- **£56.8m total spending by screen tourists**
- **£6.4m direct GVA within accommodation, food & beverage, transport, tour operators, retail, and culture & entertainment industries**
- **91,000 overnight screen tourists.**

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 the films or TV programmes.

In addition to *Outlander*, several other popular films and TV series, including the *Harry Potter* films, *Skyfall*, *Mary Queen of Scots* and *Outlaw King* have filmed in Scotland and subsequently generated significant tourist interest.

As a result of the pandemic, screen tourism – and most tourism – in Scotland was severely reduced in 2020. In 2021, tourism in Scotland started to recover.

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.

Good Omens 2 / Mark Mainz and Prime Video

CASE STUDY

Find out more about the fantastic opportunities made available to trainees in Scotland on set of Prime Video's Good Omens 2

www.screen.scot/case-studies

SUPPORT ECOSYSTEM

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

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

Entry
Further education (FE), higher education (HE) & independent organisations provide academic or vocational courses, or experience to educate & 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 a range of partners including the BBC, C4, PACT, the Screen Training Alliance, the BFI, Skills Development Scotland, and local authorities such 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, the BFI and bodies such as PACT – which have a UK-wide remit – also operate within Scotland as part of the screen education and/or 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.

Silent Roar / Johnny Barrington

HIGHER EDUCATION & FURTHER EDUCATION

HIGHER EDUCATION

2,195
HE students enrolled in film, TV or broadcast courses

£12,484
Average spend by the sector per learner

£27.4m
Total HE expenditures

FURTHER EDUCATION

3,854
Students enrolled in film, TV or broadcast courses at FE colleges

£6,544
Average spend by the sector per learner

£25.2m
Total FE expenditures

PRE-CAREER & IN-CAREER SKILLS DEVELOPMENT

Prior to entering the screen sector, the aspirations of young people are exposed to the opportunities of a career in film, TV and broadcast by Screen Scotland and the BFI, through their Film Education and BFI Academy programmes, respectively.

In terms of developing creative talent and skills there are, in addition to schemes run by Screen Scotland and the BFI, a number of not-for profit or private organisations that deliver pre-career skills development or in-career CPD.

Through National Lottery and grant-in-aid funding from 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
- **Skills development** for improving employment opportunities in the sector through increased and coordinated training
- **Talent development** for developing Scotland's screen talent (as well as promoting Scotland's talent in domestic and international markets).

In addition to the specific funding of screen education and skills development programmes, Screen Scotland funds and promotes on the job training, upskilling and traineeships through its Production Growth Fund (PGF).

As part of the PGF, producers typically have to employ trainees. According to Screen Scotland, 86 production trainee roles were supported through the PGF on projects that started filming 2021. A further 1,200+ trainee roles were supported by Screen Scotland's general skills & talent development programmes.

£6.3m Funding and income for screen sector skills development programmes in Scotland in 2019

£677,724 Screen Scotland Screen Education Projects

£5,151,811 Screen Scotland Talent Development & Skills Programme

£467,645 TRC Media

FirstStage Studios / Forth Ports

INFRASTRUCTURE INVESTMENT

24

Studio and build space facilities available

779,264

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 is largely comprised of the studio facilities used by producers of films, TV programmes, TV commercials & other audiovisual content.

£8.9m

GVA

130

FTEs

13 studio facilities or build spaces of under 10,000 sq. ft. offering a combined 72,988 sq. ft of stage space, and 11 studio facilities or build spaces of over 10,000 sq. ft offering a combined 706,276 sq ft. of stage space.

Among these 24 facilities, 10 provide stages with suitable height available to film and TV producers:

BBC Dumbarton, Wardpark Studios, Pyramids Business Park, FirstStage Studios, BBC Pacific Quay, Studio Alba, Kelvin Hall, Kelvin Hall (BBC), Pioneer Film Studios and Nightsky Studios.

REGIONAL ANALYSIS

Glasgow accounted for the largest shares of direct employment and GVA in the screen sector in 2021.

In that year, Glasgow accounted for 52.4% of direct employment and 57.8% of direct GVA. Glasgow's screen cluster generated 3,860 FTEs of direct employment and £225.7m in direct GVA in 2021.

Most of the employment generated within the Glasgow cluster is due to development and production; however, Glasgow also accounts for significant shares of employment in GVA in other sub-sectors, particularly TV broadcast, distribution, exhibition and festivals. With the exception of screen tourism, and education & skills development, **Glasgow** was Scotland's leading centre of economic activity within the screen sector in 2021.

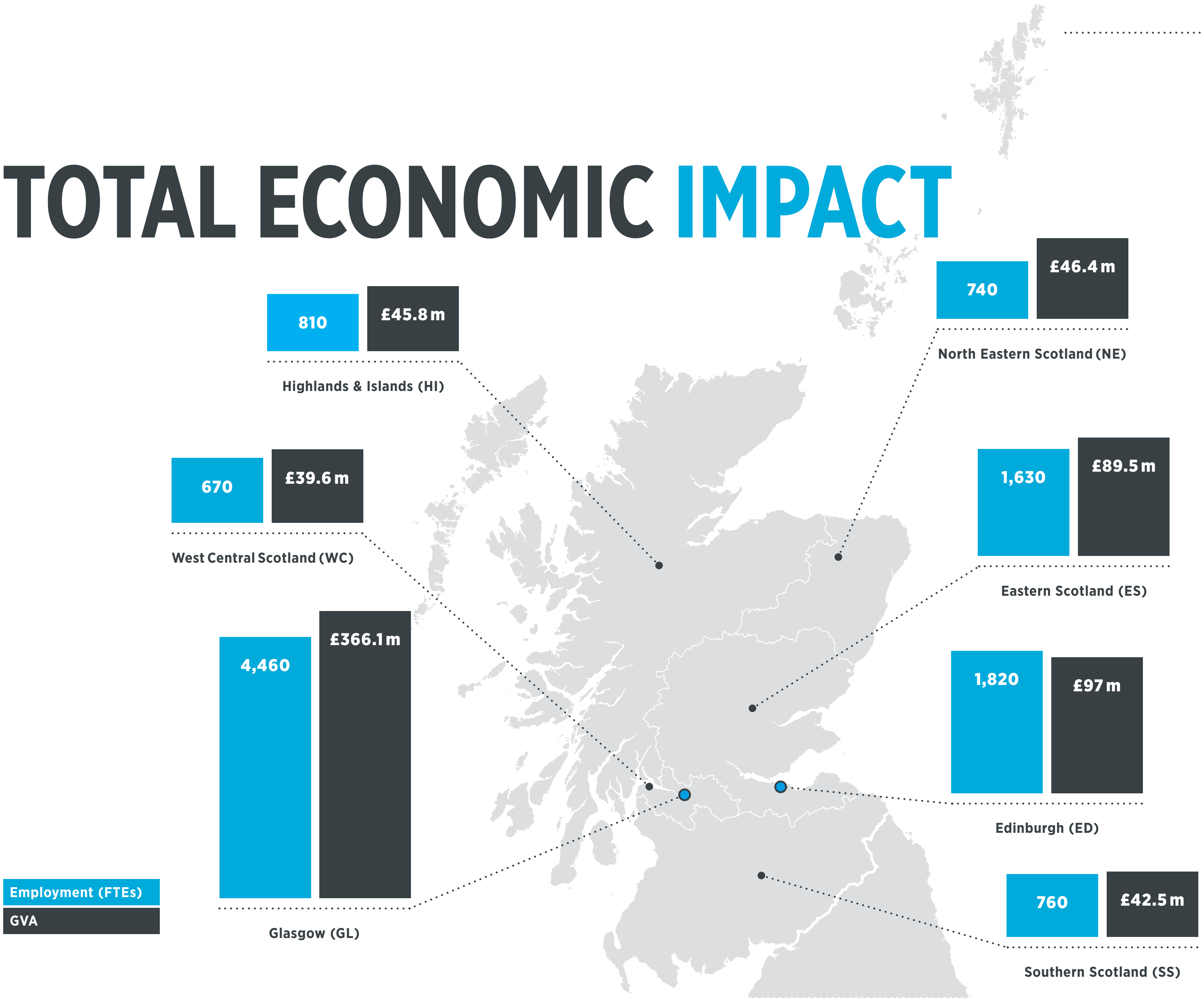
Edinburgh followed, accounting for 1,330 FTEs and £63.9 million in GVA; and then Eastern Scotland (excluding Edinburgh) with 800 FTEs and £35.9million GVA.

Highlands & Islands, West Central Scotland (excluding/ Glasgow City), North Eastern Scotland & Southern Scotland each accounted for under 7% of direct employment and GVA in 2021.

Glasgow also accounted for the largest share of the total economic impact of the screen sector in 2021, with a 41.2% share of the total employment impact and 42.5% share of total GVA impact.

Glasgow's slightly lower share in relation to direct impacts was due to the fact that many indirect and induced impacts are spread across a wider range of industries that are less concentrated in Glasgow and more evenly distributed (in terms of business and economic activity) across Scotland.

TOTAL ECONOMIC IMPACT



Further information

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

www.screen.scot/funding-and-support/research/economic-value-of-screen-sector-in-scotland-in-2021/data-visualisations

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