



Evaluation of TRC Media's Digital Economy Expansion Programme (DEEP)

Executive Summary for Creative Scotland

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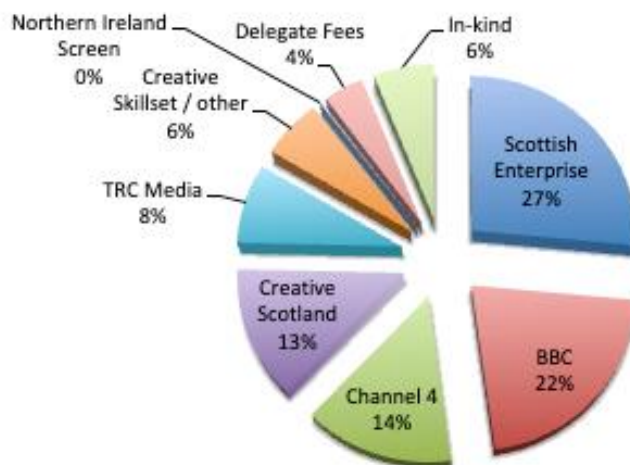
Executive Summary

Introduction

The Digital Economy Expansion Programme (DEEP) was a three-year programme designed to offer support for independent producers working in the broadcast and creative digital sector both in the domestic and international markets.

The Programme was developed and delivered by TRC Media (TRC), a long-standing and experienced broadcast and creative digital sector training provider based in Scotland. It was developed in consultation with industry and with the funding partners, in particular Scottish Enterprise (SE), which was the largest funder of the Programme. Other funding partners included Screen Scotland, BBC, Channel 4 and some regional screen agencies in the Nations and Regions, as well as TRC itself. The total Programme costs were £1.14m, and the funding was distributed as shown in below.

DEEP Funding



Source: TRC Media

Programme Elements

DEEP comprised a number of flagship programmes, some of which pre-dated DEEP while others were newly developed in response to industry need and demand. The Programme components are summarised below.

Programme Components

Course	Summary Description
Supersizer	Targeting ambitious TV production companies – support development executives by improving their skills, confidence and networks by connecting them with leading commissioners
Special Edition	Developed in response to the under-representation of women at board level in the digital/tech sector in Scotland. The programme seeks to help ambitious, talented women fulfil their potential and reach the top of the industry.
RAD	Aimed at increasing diversity in the TV industry - full-time paid traineeship aimed at groups who are typically under-represented in the industry.
Cross Creative	Six-month training and development programme aimed at senior tech/creative professionals in Scotland's digital media sector to help them to achieve professional growth and gain a competitive advantage
Cross Creative: Immersive	Cross Creative Immersive was a long-form programme with a specific focus on immersive technologies. It was aimed at creative/tech businesses already working in immersive content/storytelling or looking to develop into this new area.
Immersive Bootcamp	Two day 'bootcamp' offering transformative training and development targeted at mid/senior level professionals in Scotland's creative and immersive media sector
Creative Breakfasts	Regular networking events with leading industry figures including broadcast commissioners
Short Courses	Series of short courses on specific topics (e.g. negotiation)

Programme Evaluation

The evaluation of DEEP reviewed the performance of the programme against its financial and operating targets, and gathered feedback and impact data from companies and individuals that took part in the Programme and from the funding partners.

The conclusions of the evaluation are structured into three main themes:

- programme development and delivery, including funding and stakeholder relationships;
- benefits and impacts; and
- key sources of value and future development.

Programme Development and Delivery

DEEP has maintained a strong focus on key issues affecting both the TV and digital media industries and has secured impressive support from the industry, not least UK broadcasters. Although original income forecasts were not achieved, DEEP has nonetheless delivered and

in most cases exceeded its targets and has reached deeper and wider into the industry than forecast. To have done so on a reduced budget should be considered a genuine achievement.

Funders, wider stakeholders and beneficiaries all praised the professionalism of the TRC team and the effectiveness of their communications and delivery processes. The very consistent message was that the DEEP provision has been of a very high quality based on:

- the competitive nature of the application and recruitment process, allowing TRC to be selective and to bring together groups with shared interests;
- the structure of the courses, in particular their length and depth, and their focus on issues of genuine importance to the industry;
- the quality of the trainers and speakers, and a level of access to industry leaders and commissioners that would not otherwise be available to beneficiaries;
- the opportunities for networking and to develop industry contacts; and
- the supportive and inspiring nature of the courses and the TRC staff team.

In relation to specific programme elements, it is difficult to identify any that could be considered unsuccessful. All attracted very positive feedback, as summarised below.

Course	Headline Findings
Supersizer	Considered to be very strongly aligned with industry need both in terms of broadcaster demand for more ambitious and higher quality programme ideas and company demand for training that would support them to meet these broadcaster demands. The programme was judged to be very high quality with particularly good access to commissioners and there was strong support for it to continue.
Special Edition	Special Edition was considered very successful in helping senior women in the digital/ tech sector to develop their confidence and leadership skills and careers. All participants had since gone on to achieve greater success in the industry.
RAD	Diversity is widely recognised as a key issue for the industry and RAD was successful in helping companies to access more diverse talent (BAME issue notwithstanding) by virtue of TRC taking much of the recruitment burden. Support for trainees and companies alike was highly rated, even if many found the programme to be more challenging than they may have first imagined (including TRC). There was strong support for similar provision in future, but with greater effort to attract more BAME candidates.
Cross Creative/ Cross Creative: Immersive	Although different programmes targeting different markets, both were highly rated in terms of course content and access to industry. Again the long form nature of the programme was valued and the only slightly negative comment was that the group (for Cross Creative) seemed very diverse with perhaps less common ground amongst participants.
Creative Breakfasts	Creative Breakfasts were identified as a useful way for companies to meet with commissioners and learn more about commissioning priorities. There was some demand for more in the way of one-to-one commissioner meetings, in addition to the one-to-many format of the Creative Breakfasts

One element of DEEP that did not progress was Look East, a programme aiming at developing opportunities for companies in Asian markets. As initial workshop did not generate sufficient interest for the sector in further support and the course was dropped.

As a result, while there was still a strong international focus in DEEP it was less than in TRC's previous provision. There was interest in expanding this in future and we return to this issue in the recommendations.

Benefits and Impacts

There was clear and compelling evidence that DEEP has delivered strong benefits for participating individuals and companies as follows.

- **Individual benefits:** increased confidence, new skills and knowledge; new industry contacts and peer networks; improved job prospects (including securing new positions) and increased ambition; and
- **Company benefits:** increased ambition; new networks and contacts; increased staff motivation and confidence; better market understanding; more diverse workforce; new ideas and perspectives; and inspiration.

In addition, despite the difficulties in attributing economic gains to the support, there was evidence that DEEP has produced economic impacts for many of the participating companies, particularly those on Supersizer and Cross Creative. For every £1 spent on DEEP, the programme produced an estimated £5.40 of net additional GVA, a good return for a programme of this nature. It is worth noting that the majority of the economic impacts have been from TV production companies, and the level of impact reported by digital companies was considerably lower.

Sources of Value and Future Development

Through DEEP (and in previous evaluations of its services) TRC has demonstrated that it provides highly regarded, valued and impactful training and development for the screen and media sectors. Based on the company and stakeholder feedback, a number of factors seem important in contributing to this:

- deep knowledge of the industry (in particular broadcasting, but also the wider digital sector) and strong connection into both the supply side and buyers (commissioners);
- well thought out programmes developed on the basis of industry input and responding to industry needs;
- longer form training programmes allowing a depth of input and multiple perspectives;

- group structure affording participants the opportunity to build strong peer networks;
- excellent access to industry contacts, in particular broadcast commissioners, providing direct access to markets and market intelligence;
- high quality trainers; and
- a knowledgeable, professional and supportive staff team.

Future Development

There is a clear case for TRC to continue to provide support to screen companies in Scotland, and the support landscape would be considerably weakened without this provision.

Key areas in which TRC might focus are as follows:

- development of high-end development talent, building on Supersizer, to continue to encourage high quality ideas and pitches from Scottish production companies. Participants should also include digital companies seeking to break into the broadcasting market (we are aware that this has happened with the inclusion of Cut Media in the current round of Supersizer);
- diversity training both for individuals from diverse backgrounds seeking to enter the industry and companies wishing to employ a more diverse workforce. Ongoing and focussed effort is required to ensure that opportunities are known and made available to potential applicants from diverse backgrounds, in particular BAME;
- access to buyers and commissioners is a key source of value that TRC offers to the sector, and should continue to be central to the offer. Although some of the Creative Breakfasts included opportunities for companies to meet commissioners on a one-to-one basis in addition to the group setting, this could be expanded and more widely promoted in future. TRC should also work to develop its networks within the SVOD platforms (Netflix, Amazon, Apple, Now TV etc);
- there is a strong case to revisit the international aspects of TRC's programme. With limited growth in the UK broadcasting market, there is a growing need for companies to look further afield, and in particular to the US, China and the SVOD markets. This could be the focus of a specific programme but could also become a stronger focus within programmes like Supersizer;
- TRC's involvement with the 'digital' sector was much discussed in the consultation. Clearly areas of the digital sector are lower priority for Screen Scotland unless they bear directly onto the screen sectors (e.g. VFX, online media seeking to enter

broadcasting, VR and AR, etc). This may be an appropriate way to focus TRC's efforts in this area. However, it is important that TRC maintains a position in this market given the growing cross over between digital media companies and the wider screen sector;

- in relation to funding, there are two lessons from DEEP. First, the three year funding commitment was enormously valuable to TRC in enabling them to plan and also to evolve provision. Secondly, and related to the latter point the pilot fund allowed TRC to research and test new provision. This was also considered extremely helpful; and
- there is an opportunity to develop a more appropriate monitoring and evaluation framework for TRC aligned to Screen Scotland's developing strategy for skills and for business and market development. Given the effort required on the part of TRC to collect the data, it would be sensible to align programme KPIs with wider strategic objectives for the sector.