



CHANGING THE LANDSCAPE FOR
THE SOLENT'S FILM INDUSTRY

LETS MAKE WAVES

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Let's Make Waves – Changing the Landscape for the Solent's Film Industry

EXECUTIVE SUMMARY

This research study aims to develop an evidential basis to inform strategic development of the film industry in the Solent (south central) region of the UK. The density of the creative industries around the region is driving the growth of jobs. Yet, film production in particular, appears to struggle with field configuration, lacks ecological cohesion, and suffers from underdeveloped ecosystems when compared to other areas bordering the region. Though thriving, a lack of coordinated leadership results in the continued reproduction of an ill-configured, constricted and socio-economically filtered workforce. One that struggles to seize strategic opportunities arising as a consequence of the ongoing investment in UK film production around the west of London. Taking a participatory approach, the study sought to avoid the universalism of place marketing and focus on the situatedness of the region and its specific cultural, social, and economic contexts. The staging of a series of high profile networking events provided a much needed field configuring activity and enabled the capture of voices of those currently working in the sector. It is understood that a focus on production is not in and of itself a solution to the challenges faced in the region. There is a need to address issues of access as a counterbalance to skewed representation among the creative workforces thus the study also aims to report on opportunities for embedding diversity and inclusion in any strategic solutions.

THE RATIONALE FOR THIS STUDY

Solent LEP 2020 & Solent's Creative Economy¹

The creative economy in the Solent LEP region is an ecosystem of businesses, organisations and individuals that includes a wide range of occupations and activities distinguished as an economic activity through the generation, production and distribution of intellectual property. It includes the creative industries and cultural sector and manifests both at an individual and organisational level. Typically, it includes but is not limited to activities such as Film & HETV production, publishing, museums, performing arts, crafts, architecture, design and others. In the UK around 9.6% of employment is in the creative economy and this is growing. While the creative economy is often thought of as B2C, the creative economy actually involves a complex ecology of B2B supply side services. Such that increased investment can provide increased demand in the supply chain – the point being that the creative economy doesn't exist in isolation from the broader economy. The overlap between the digital and creative industries is one area of significant growth.

The Solent's creative economy is modest in size. It generates approximately £1.5bn GVA2 for the Solent LEP economy. It employed over 40,000 people in 2017, which is more than the creative sectors in both Brighton and Bournemouth combined, although a much smaller share of the workforce. The creative industries play an important role in place-making in the Solent, contributing to the quality of life and supporting other sectors such as the visitor economy. The Solent creative economy is growing rapidly, mirroring national trends. Over the period 2010 to 2015, all local authorities in the Partnership for Urban South Hampshire (PUSH) experienced at least a 25 percent

¹ <https://www2.deloitte.com/uk/en/pages/technology-media-and-telecommunications/articles/the-future-of-the-creative-economy.html>

increase in employment within creative roles. More specifically, Gosport was a standout performer with a rise of 89 percent whilst Southampton and Fareham also saw rises of 60 percent.

ScreenSkills/BFI 2022 Forecast of Labour market shortages and training investment needs in film and high-end TV production²

ScreenSkills, an industry-led skills body for the screen industries (film, visual effects, animation and games), recently published a report reviewing the labour market for the film and HETV sector in partnership with the BFI as part of the Future Film Skills programme (ScreenSkills 2022, p.4):

- The report predicts just under 2.7 million sq. ft of additional sound stage space is likely to come online in the UK by 2025.
- It estimates that the UK could attract an additional £2bn into film & HETV production spending by 2025, on top of the £5.6bn recorded in 2021.
- However, without the commensurate investment in labour and skills development the UK will not be able to utilise the capacity.
- The sector estimates an increase of around a 30% FTE over the current workforce size of around 52,300 FTEs in 2021.
- The study concludes an annual investment of around £100m in training is required to meet this need representing around £2097 per trainee and £1452 per worker. Sums which are consistent with economy-wide averages.

BFI Skills Review 2022: Workforce development in the scripted and high-end television production sector³

In response to the results of this labour market research the BFI make the following recommendations for addressing the skills needs of the film and HETV sector over the coming years (BFI 2022, p.10):

1. *An industry-led and localised approach to investment in training* – requiring input and engagement from all stakeholders interested in developing a skilled workforce.
2. *A more formalised approach to hiring, workplace management and professional development* – removing barriers to entry, better support for in-service training and development, better working conditions.
3. *Stronger bridges into industry from education and other sectors* – industry support for work experience, traineeships and lowering of barriers to entry, improved access for diverse geographical and socioeconomic entrants, better access to employer-led opportunities for students.
4. *More comprehensive careers information, profiles and pathways* – improve awareness of the opportunities available for those seeking work and those already in work, better support for career changers, better sign posting of bridges into the industry.
5. *Better data to support policy and action* – more needs to be done to gather the existing data and more granular research needs to be undertaken that supports policy decision making and informs training needs.

² <https://www.screenskills.com/news/new-forecast-of-skills-and-training-needs-to-support-uk-film-and-high-end-tv-production-boom>

³ <https://www.bfi.org.uk/industry-data-insights/reports/bfi-skills-review-2022>

THE CURRENT LANDSCAPE

Film & HETV Development Agencies

A search for voluntary and/or professional sector organisations working in the field of film & HETV development and support returned an relatively small result with just two significant organisations seemingly present in region.

City Eye: located in Southampton, is an independent charity that supports individuals and communities to experience and be changed by film. A small organisation funded by Southampton City Council and the BFI through Film Hub Southwest and the Film Audience Network, City Eye is housed in the Studio 144 arts complex in the city centre. They deliver training, run workshops, curate screenings, organise networking events and manage Southampton Film Week.

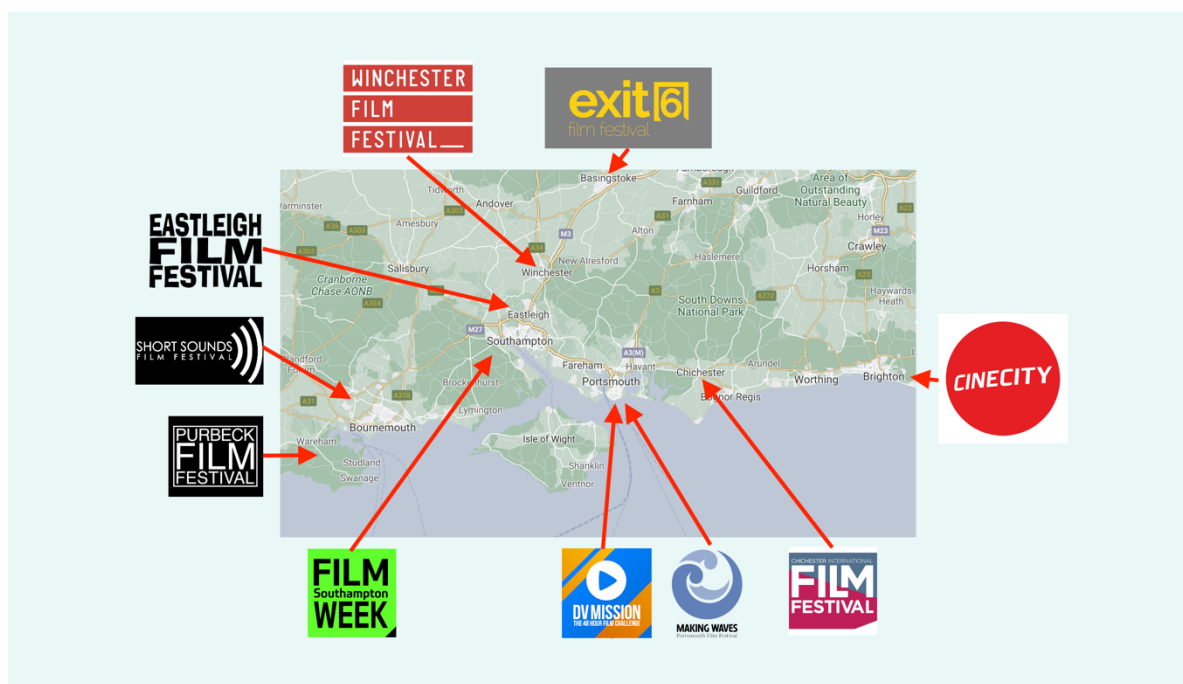
<http://www.city-eye.co.uk/>

Film Expo South: operating in and around the New Forest, is a volunteer led group of industry professionals that seek to emulate a film office model aiming to provide a one-stop solution to productions operating in the region. They have in the past also staged a number of 'expo' events that had a strong industry focus and provided opportunities for local businesses to showcase and promote their services.

<https://www.filmexposouth.com/>

Film Festivals

There are a number of small-scale film festivals operating in and around the region some of which have been running for a number of years. In some instances, they have a very focused or niche brand which brings particular benefit to the festival and for audiences. While others are organised around a venue, many are less industry focused than might be desired. There has been to date no mid-sized film festival in the region of the scale of Bolton, Cambridge, or Cheltenham. There is no formal, identifiable liaison between the festivals operating in the region which often leads to date clashes and there is little if any cross promotion or support. The diagram below illustrates the range and spread of film festivals currently on offer in the region.



Film Offices

A number of film offices exist in the region with two run from within local government and the third run independently. The most active of these is Film New Forest which has been established for some time, while Film Wight is a relatively new initiative. The longest running, Film Hampshire has been in existence for some fifteen plus years but currently doesn't appear to be as well-resourced as it once was. While not all regions in the UK operate film offices and there are a number of competing operational models. It is surprising that given the close proximity of the Solent region to the growing film & HETV production base around the west of London, and with the quantity and quality of potential film locations around the region there is not a more sophisticated regional offer supporting film location services.

Film New Forest: has a dedicated team available to field enquiries, is a Creative England partner, organises business networking events, holds an extensive database of crew, services and resources, a focused and self-aware brand that is actively promoted.

<https://filmnewforest.com/>

Film Hampshire: from its heyday as a full service film office the organisation is now just a website with lists of resources, guidelines, and contacts for local government offices and a link to the Creative England locations database.

<https://www.hants.gov.uk/business/filmhampshire>

Film Wight: recently created by Venture Fest South and supported by the Isle of Wight Council, Arts Council and by local businesses, the website has a database of locations, crew database, and showcases existing film productions on the island. They have a news section on the website which is regularly updated.

<https://www.filmwight.com/>

NETWORKING EVENTS

The researcher found little evidence of regular formal opportunities for film and & HETV networking in the region beyond a few small-scale events associated with the regions annual film festivals. While in Southampton City Eye provides a regular monthly event for filmmakers, outside of the city there is very little opportunity for field configuration.

METHODOLOGY

The study delivered six film industry and creative industry networking events in the Solent region which also served as data capture opportunities. The events were staged in Brockenhurst in the New Forest, Southampton, Fareham in South Hampshire and three staged in Portsmouth; one of which was delivered as part of Portsmouth Business Week and one in partnership with BFI NETWORK Southwest. A further event had been planned for the Isle of Wight in partnership with Film Wight, but it proved difficult to coordinate and was eventually cancelled. One hundred and seventy four attendees participated in the events their occupations ranging from students, early career as well mid and late career filmmakers, representatives from sector organisations, alongside owners of production companies. The events were open invitation and registration was promoted via partner organisations including; City Eye in Southampton, Film New Forest, Making Waves Film Festival in Portsmouth, Hampshire Chamber of Commerce, BFI NETWORK Southwest, Shooting People, and other film industry related channels.

Each event included a guest speaker as well as hospitalities provided through internal seed funding by Solent University. Data was gathered from networking event participants through a poster cruising activity which asked participants to respond to the BFI Next Up strategy objectives (see Appendix I), which were in themselves the product of a year-long national consultation process. The four overarching BFI Next Up objectives provided a framework within which the study could ask the question “what do we in the Solent region need to do to in order to achieve these objectives” and to which the study respondents could respond. Subsequently the individual posters were collected, photographed and the comments on them transcribed. These were then hand coded, initially under the headings of the four BFI Next Up objectives. Then a further round of coding was undertaken to arrive at a number of key themes.

EMERGENT THEMES & OBJECTIVES

The objectives below are edited summaries of the themes that emerged during the process of coding respondent’s comments gathered during through the data capture activities undertaken at each of the networking events delivered as part of this research project. Respondents were asked how the region could address the BFI Next Up objectives (see Appendix I) and what appears below is their response.

TALENT DEVELOPMENT

- Nurture talent through ‘active inclusion’ and support increased diversity within the workforce and opportunities for local people.
- Provide more opportunities for people to learn about creative mediamaking through workshops, classes, training, mentoring and advice services for all ages and career stages that encourages creativity and the telling of diverse and inclusive stories.
- Mobile devices make film making accessible and social media channels provide instant access to audiences – is this an opportunity?
- Support for alternative routes into training and education aside from universities, for example apprenticeships and more work experience opportunities.
- Support the creation of creative safe spaces where people are able to fail.
- Better marketing to young people as well as those seeking to switch career paths about the opportunities available to them.
- Go out into the community and engage with diverse populations through outreach programmes.

PRODUCTION

- Support independent productions and create success stories by funding film production for; short films, tik toks, mobile filmmaking, features, in drama and documentary that support the telling of different stories representative of the diversity of the local population.
- Provision of Solent wide locations services that provide information on locations, services, crew, and other supply side resources.
- A Solent Media Village.
- Sustainable production planning advice and support.

EXHIBITION

- Support for independent and community venues/cinemas to screen a greater range of films.
- Build screening rooms.
- Create and support local and regional film events.

- Work with the BFI and WSFA to promote film heritage and make heritage collections more accessible.

SHOWCASING

- More pyrotechnics, more visibility, we need embrace an identity as a creative region.
- Create a mechanism for local people to screen their films in local venues around the Solent.
- Create an online showcase for local filmmakers and media creatives.
- Stage events where local productions can be screened.
- Organise opportunities for local films to be screened nationally/internationally.

BUSINESS SUPPORT

- Found a central hub promotes collaboration and partnership.
- Identify funding opportunities that can support talent development from early years to late stage careers.
- Develop partnerships between schools, colleges, and universities (providing access to existing resources).
- Generate partnerships with sector skills councils, national and regional funding bodies and other sector organisations.
- More/better mentoring and access to knowledgeable experts that can provide advice and support at all levels and stages of a career.
- Support for businesses to provide new entrants opportunities for on set experiences, internships, and work experience.
- Better access to data that evidences the need for change and evaluates impact.
- Better links to talent agents, producers, production, and location managers to ensure crews are sourced locally.
- Agent finder for script writers.

NETWORKING

- More networking events, after school clubs, festivals, career fairs and opportunities for learning about the film industry.
- Regular networking events that are accessible, inclusive, and focused on career and personal development as well as business development.

CONCLUSION

There is a need to:

- develop a talent pipeline that supports and nurtures talent in an inclusive manner through all stages of a career, through the provision of workshops, classes, training, and mentoring, and to increase opportunities for people living in the region to participate in media making activities.
- create more opportunities for young people to meet employers and industry people through work experience and on-set opportunities, along with better links to talent agents, producers, production, and location managers to ensure crews are sourced locally and to provide a central point for sharing information about jobs and opportunities that could be accessed by learners, teachers, and careers advisors.
- support independent productions and create success stories by funding film production e.g. short films, tik toks, mobile filmmaking, features, in drama and documentary that support the telling of different stories representative of the diversity of the local population.

- support the provision of a Solent wide locations services that provide information on locations, services, crew, and other supply side resources that supports commercial as well as independent production.
- promote the visibility of the region as filmmaking destination through creative place making, the showcasing of locally produced media and the staging of festival style events both online and in the real world.
- stage regular field configuring events to enable those in the industry to connect with each other and to provide support for the growth and consolidation of the creative sector in the region.
- better support independent and community venues/cinemas, to support the screening of a greater range of films that represent local stories and make better use of heritage collections.
- develop a business case that establishes the value of the creative and cultural sector for the region, this could be done with support from the regional Universities if access could be provided to the data and resources (time) to do the research and create a report. This needs to be led strategically and not just be another side project.

Clearly there is also a concomitant need to found a central hub or organisation that can deliver a long term strategy for the achievement of these objectives. One that represents the regions film industry cluster, that can identify funding opportunities to support talent development from early years to late stage careers, develop partnerships between schools, colleges, and universities (providing access to existing resources) sector skills councils, national and regional funding bodies and other sector organisations, and develop more/better mentoring and access to knowledgeable experts to better support all levels and stages of career progression. Such an organisation will need to be fully integrated the with Solent region’s strategic plan for the creative economy, be engaged with ACE, BFI, Screenskills and others sector organisations to ensure there is a plan for growth that includes community building, as well as recognition of the value of inclusivity and diversity, and which supports enterprise development.

A fundamental question that now needs to be asked is where is this sort of thing already being done well, and can existing models be replicated in order to address these objectives?

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APPENDIX I

1. Experiencing stories on screen

Everyone can experience a great range of stories on screen

1.1 Greater opportunity for young people to engage with and enjoy film and the moving image including in education

1.2 More people can overcome social, economic or geographical barriers to access film and the moving image

1.3 People across the UK can access a wider choice of film and the moving image including stories that reflect their lives

1.4 More people can engage with heritage collections that better reflect the diversity of the UK

2. Creativity and storytelling

Anyone can create original screen work, from first-time creators to world-class professionals

2.1 More young people understand how to express their creativity through stories on screen

2.2 Emerging and established creative talent is supported and nurtured

2.3 An environment and culture that better enables people to innovate and experiment creatively

2.4 A wider range of stories on screen are told that otherwise wouldn't be

3. A skilled and representative workforce

The UK screen sector workforce is skilled and reflects the population

3.1 Equitable and more visible routes into the sector, from school age onwards

3.2 People from under-represented groups across the UK can access the support they need to develop their careers and skills

3.3 Workforce retention is improved by the creation of inclusive, flexible and supportive workplaces

3.4 Vital skills for the sector that cannot be delivered by the commercial market are developed

4. Success in a changing landscape

Independents and cultural organisations can adapt and thrive in a changing landscape

4.1 Better support available for small and medium-sized enterprises and independents to develop their businesses

4.2 Evidence-based insight and analysis of the screen sector is readily available to all to better support organisations and activities

4.3 An increase in the international engagement and reach of the UK screen sector

4.4 Screen organisations have significantly reduced their carbon footprint