Culture, Tourism, Europe and External Relations Committee

Scotland’s Screen Sector

Written submission from the Scottish Locations Network

Context

Response from the Scottish Locations Network, the network of local authority film offices and film liaison officers around Scotland. Film and screen offices are a local authority’s front line in assisting film & media production of all types working in the city / region, with guidance about procedures, locations, local crew and services, and the development of Production / Filming Charters and Codes of Practice that are benchmarked against the rest of Scotland and the UK.

The Scottish Locations Network and Creative Scotland Locations (now Scotland’s Screen Commission) have a strong and long-standing collaboration arrangement. Creative Scotland Locations sits at the centre of the hub providing a central point of reference for international productions seeking information about Scotland as a whole, and represents the whole of Scotland at international trade events. The Network provides regional location suggestions to Scotland-wide production enquiries, works towards common practices across the local authorities in Scotland, and provides local guidance and facilitation for productions shooting on location.

The Scottish Locations Network is pleased to have been represented on the Screen Sector Leadership Group and submits this response in the light of participation in the research and data group.

Leadership and Strategy

How can Scotland become a key destination for UK and international productions?

In answering this, we shall address the question of why Scotland should be trying to become a key destination for UK & international productions.

The Scottish Locations Network works with productions of all genres and all budgets, from high-end feature films and TV dramas, commercials, documentaries /factual TV, entertainment shows and corporate videos. Statistics compiled by the Scottish Locations Network demonstrate that the economic impact of film and TV production in 2016 was £69.4M.

Currently, 88-95% of production in Scotland, is factual TV, commercials, corporate promos, music videos, web broadcasts and short films. These productions give steady employment and opportunities to hundreds of film and TV practitioners in Scotland, and in fact the majority of independent production companies in Scotland make their living from these productions. Indeed, one could be forgiven for wondering why there is such a clamour for dedicated film studio space, given that these productions on the whole do not need such a facility. But when you consider that one film, Avengers: Infinity War, had an economic impact that more than doubled the average annual total of all production expenditure in Edinburgh, and then add to that the huge potential for international tourism, as exemplified by Northern Ireland and Irish Tourist Boards with Game of Thrones (GoT) and Star...
Wars, and you will understand why these high-value scripted dramas are so sought after.

Scripted drama presents huge opportunities and career development for hundreds of professional crew as well as new entrants on each production. Avengers hired around 50 local runners as well as Scottish locations & logistics crew, and also hired many of Edinburgh’s facilities companies for a period of two to three months. This, added to expenditure on local services and accommodation, meant that the immediate benefits of production were felt widely across the city region.

The Committee will be aware of the opportunities provided by Outlander since it created its own studio facility in an empty warehouse in Cumbernauld in 2013 and will have the opportunity to read about several such aspects with the evidence submitted at this time. It is important to recognise the impact that Outlander has had on Scotland’s production landscape, demonstrating that Scotland has the skills and infrastructure to accommodate a long-running production of this scale. Wardpark’s owners have been awarded financial support to extend the site by a further two stages. If this means that further large-scale productions can shoot simultaneously in the same facility, this will be an improvement. We shall wait to see.

Without further developments of dedicated film studios in Scotland every potential scripted drama is forced to look for empty warehouses that can be temporarily occupied, or they simply move to one of the other dedicated film studios in the UK / Ireland / Europe and further afield. Film and TV productions will shoot wherever it is cost effective to do so, and a large part of the cost is fitting out a warehouse to be used as a film studio.

Many of the papers have highlighted the jobs and economic impact derived directly from film and TV production, but it is also important to recognise the long term economic impact on tourism from a successful international feature film or TV drama, particularly in the light of Scotland 2020.

According to the Northern Ireland Tourist Board, Game Of Thrones allowed them to connect Northern Ireland with a huge international fan base, introduce a positive image of Northern Ireland, and, importantly, led to an increase in local civic pride. The series is broadcast in 199 territories worldwide and has over 20M Facebook fans and over 3M Twitter followers. Tourism Ireland (the tourist board for the island of Ireland) worked with HBO to create campaigns that would speak to GoT fans. During Season 4, the number of visitors to Northern Ireland increased 11%, and visitors to GoT experiences grew tenfold.¹

Outlander meanwhile is already benefiting Scotland’s tourism industry, with visitor numbers to Doune Castle souring 110% in the past 4 years, with ‘Outlander-inspired’ tours and experiences generating business for the hospitality and retail industries across Scotland. VisitScotland research found that 14% of visitors to Scotland came because of a film or TV programme featuring Scotland, citing Outlander as one of the drivers. This is compared to 3% who visited having been inspired by marketing / PR / advert.²

It can be noted that members of the Scottish Locations Network also collaborate with VisitScotland’s Screen and Cultural Tourism service to support aims to maximise screen tourism.

To support the business case for more film studios, the Committee has been directed to several reports of economic & cultural success around the world following the development of film studios. Here are a few more:

- **Bristol** – Bottle Yard studios have had a dramatic impact on Bristol’s ability to attract production, particularly after BBC relocated flagship drama Casualty to Wales. This is a public/private partnership.³
- **Manchester** – The Space Project and The Sharp Project, studio and production office space respectively, have put Manchester at the centre of the ‘out of London’ production business, with further expansion of the Space film studios announced earlier this year. The Space Project & Sharp Project are Council-owned arms-length companies.⁴ ⁵
- **Cardiff** – government-backed private film studios have seen Wales win high-value production after high-value production ⁶
- **Belfast** – Titanic Studios and the new Belfast Quay studios, together with incentive finance and UK & Irish tax relief, make Belfast highly attractive to international production.⁷
- **Republic of Ireland** – well established Ardmore Studios and Ashmore Studios and the more recent Troy Studios
- **Atlanta Georgia (USA)**
- **Vancouver (Canada)**
- **Prague (Czech Republic).**

Of course, film studios alone do not automatically result in successfully attracting international production. We have already mentioned that film & TV productions are looking for attractive financial packages, and current tax relief in the UK for high end films and TV dramas has seen a marked spike in the amount of production in the UK, with 2016 statistics recording an economic impact from film & TV production in the UK of over £2B. 85% of this is derived from studio-based international feature films and high-end TV dramas. Scotland must therefore continue to benefit from same or increased levels of tax relief in order to attract scripted drama while at the same time develop film studios.

Why have film and TV producers selected Scotland in the past as a location for production?

- Finance – production finance / UK tax relief
- Locations
- Crew and services
- Local authorities that are willing to facilitate filming.

---

⁴ [http://www.thesharpproject.co.uk/sharp-project-contributes-32-million-local-economy/](http://www.thesharpproject.co.uk/sharp-project-contributes-32-million-local-economy/)
What is your view on the current network of regional film offices across the country?

Film offices are a local authority’s shop window for production, offering a triage service for productions, providing information and advice to productions of all levels about how to go about filming in a city region and, when a production has significant facilitation needs, working with Council services to support it. They prepare the ground for all potential film productions through research, local engagement and regional lobbying, ensuring that when a production decides to film in Scotland, the local authority is ready to support it, be that through implementing traffic management controls, clearing streets, cleansing, or allowing filmmakers to use a council-maintained location. It is worth noting that without local authority support for production, large-scale films and TV dramas which have demanding facilitation requirements could not take place. Film offices work intra-departmentally across Council services, in some cases with more than one local authority, with national agencies including Police Scotland, the National Trust for Scotland, Network Rail, Historic Environment Scotland, as well as with a wide and well established network of local contacts within the community including both businesses and residents.

Film offices are also the main source of data about the quantity and value of production to Scotland, providing annual statistics about all types of production in the region to the local authority in order to provide evidence as to why the local authority should continue to support production activity, and these statistics are shared with the Scottish Government via Creative Scotland to enable the creation of Scotland-wide figures. Most film offices tabulate value using national averages (produced by Creative England / Production Guild UK), having found it unrealistic to extract precise data about local expenditure from every production that shoots in the region, though local authorities which can invest in production ask for regional expenditure by way of return for investment.

Creative Scotland captures accurate data about the productions in which they have invested, but film offices capture not only feature films but also TV dramas, light entertainment, factual TV, corporate videos, commercials & even photoshoots – all of which make up the ‘film sector’ in Scotland. While the smaller-scale productions may not create such large headlines, nor have as large an economic impact as the likes of Avengers, they are nonetheless critical for the production eco-system in Scotland, being the majority stakeholder. These productions hire locations, skilled practitioners, they provide opportunities for new entrants, and they help to raise awareness of production within the community. Let's not forget that a TV show like Strictly Come Dancing, which has filmed links in Glasgow this year with two Glasgow-based celebrities, is watched by over 10M people in the UK each week, and Location Location Location dedicates an hour of programming to a city region with audiences of around 2M per episode.

However, the current film office provision is uneven. While Edinburgh/East Lothian/Scottish Borders, Glasgow, and Fife/Tayside have dedicated full-time officers, with in-depth knowledge of their regions and extensive locations libraries and local crew databases, the other local authorities around Scotland have part-time film officer provision due to budget constraints, with officers focused on other demanding remits beyond production facilitation.

Reviewing strategies for screen agencies and offices in key markets such as the USA, Canada and Europe, it is evident that best practice performance requires
responses within 24 hours for enquiries and 48 hours for production facilitation (excepting traffic controls), timescales which may not be achievable within a part-time film office role.

There may be mileage in making public funding available to local authorities, managed by the Screen Unit, to help local authorities provide dedicated film officer support and roll out a common Film Charter and Code of Practice within the local authority.

The network of film offices can be seen at www.scottishlocationsnetwork.com.

Talent Development, Skills and Training

*How can Scotland nurture and retain domestic talent?*

The development of film studios will allow for a more sustainable pipeline of production in Scotland, which will mean crew can consider working in Scotland as a career rather than something short-term.

An environment including broadcasters that encourages and supports the creation of more original content including drama and other genres that require crew and other services such as post-production and VFX, would also be advantageous to the Scottish production sector, and the Scottish Locations Network welcomes the announcement of the new BBC Scotland channel as well as the additional £10M investment in the screen industries that is to be available through Creative Scotland.

*Does Scotland have the requisite level of domestic talent to accommodate an increase in productions coming to the country?*

We believe there to be sufficient drama crew to service 2-3 large-scale productions at the same time. Our production crew base would therefore need to grow if we are to accommodate an increase in productions coming to the country, but an expanded crew base requires work if Scotland is to retain them. There are hundreds of students studying film, TV and media in universities and colleges in Scotland, but in the current climate there are insufficient jobs in production for them. Some would argue that university and college education does not deal with training for production crew.

In Atlanta, the growth of film studio provision led to the creation of film production training campuses. The New Entrants Training Scheme has been lauded as a model, though only training a small number of crew each year of its existence. We recognize the huge contribution made by *Outlander* and its trainee scheme and we welcome the commitment made by NFTS to open a focused training centre in Scotland for production skills which are not covered by the further and higher education establishments.

*What infrastructure, support & investment is required to ensure continuing development of talent in Scotland?*

Studio facilities, more training schemes for filmmakers taking filmmakers from short film to feature length productions. Currently SFTN offers a short film production scheme a year, while Scottish Documentary Institute has the *Bridging The Gap* scheme for up and coming creative documentary makers, but there is a lack of
career development programmes for new entrants to bridge the gap between their first short film and feature length film or TV broadcast.

*How do we address the problem of inconsistent work for employees in the Scottish screen sector?*

Film studios, more crew trained, continued investment in production both indigenous and international.

**Infrastructure, intelligence and maximising benefit to Scotland**

*What improvements to the current infrastructure are needed?*

More studio infrastructure. Currently one fully-fitted studio in Cumbernauld, the remainder of spaces used are warehouses that come and go.

*How might this be achieved?*

Public sector could take a lease or buy a space or two. Or the private sector could do so.

*What kinds of facilities are needed and where?*

Large-scale film studios to support the high-value feature films and TV dramas that recruit several hundred crew at a time. We need these, at the very least, near the largest cities of Edinburgh and Glasgow.

*How can we ensure the productions leave a positive legacy after filming?*

This is crucial. Filmmaking is a demanding process, and we should be aware of overkill unless there are benefits returned to the country. Legacy could be ensuring location fees include monies ring-fenced for the development of the location being used, as happens already at the National Trust for Scotland.

There should also be a culture shift that sees appropriate credits, access to publicity materials at the time of a film’s release and permission to conduct publicity, especially where there has been public funding and/or facilitation by public bodies. This is a standard request by the likes of Network Rail, National Trust and many locations and film agencies in England. A country which can see the benefits of production beyond the end of filming is one in which public support, both financial and moral, will be forthcoming. Therefore, an understanding on the part of Production Companies and Distribution Companies that sharing publicity materials with locations used and destination marketing agencies in order to help promote the film and the locations used therein is mutually beneficial. See Ireland and Northern Ireland re Game Of Thrones.

There should also be a requirement to take on Scottish trainees. The *Outlander* trainee programme stands out as a success story.
Data gathering

The need for more reliable data about the sector and how it might be collected.

Data used by the Scottish Government about the value of production in Scotland comes from the Scottish Locations Network whose film offices provide regional statistics to Creative Scotland. As mentioned, in 2016 the value of production was £69.4M.

The data includes only the productions that have contacted the film offices: those that are filming on location in the region or which need assistance. But not every production contacts the local film office. For instance, documentaries which do not need any assistance or are filming entirely on private property or productions filming in-house / only in studios. This means that the figures do not include much of BBC Scotland’s local output (news, River City, etc).

Most film offices in Scotland now collate data using recognised national averages, widely used by the film offices in England, Creative England and Production Guild UK. It has proved unrealistic to ask production managers to separate regional expenditure from the budget, at least in the case of productions which have not received funding from that region. Use of national averages allows film offices to record not only scripted drama but also factual TV, commercials, entertainment, corporate videos, and other small-scale productions which have no need to contact Creative Scotland. Where a city /region has made a financial contribution to the production budget, it is expected that the production supply budgetary data on what has been spent in the region as part of the terms & conditions, in the same way as productions which have received national funding from Creative Scotland will provide budget data at the end of production.

PACT also collates & analyses data from its Annual Financial Census and Survey, and this includes data from Scotland. Their most recent figures from 2015 put the value of Scottish original production at £190M. However, this data is about company turnover rather than Scottish expenditure, and therefore includes budget spent outside Scotland, and our understanding is that it derived only from PACT members in Scotland who responded.

The difficulty lies in creating a true picture of the value of production when not every production contacts a public agency, be that Creative Scotland or one of the film offices in the Scottish Locations Network. It goes without saying that concrete and sturdy data about the industry is obligatory when making policy decisions that effect it, in order not only to assess where we are and identify areas for improvement, but also thereafter to assess impact.

The Scottish Locations Network would call for all productions of every scale to make contact with the film office in the area in which they are filming, even just to let them know that there is filming taking place, in order to create an accurate report demonstrating the quantity and value of production in Scotland.

Paper compiled by Rosie Ellison of Film Edinburgh, with contributions from Julie Craik of TayScreen/FifeScreen, Jennifer Reynolds of Glasgow Film Office and Caris Pittendreigh of Highlands Film Office.