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# Film Solent: growing South Hampshire's film economy

Report of seminar held at Fareham  
College on 23 September 2022

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### Background

Film is an important and growing part of our region’s creative economy (see table below). A thriving film industry brings with it many benefits: exciting careers for our young people, important direct and indirect economic benefits, and the opportunity to create a distinctive identity for our region. Whilst South Hampshire has much to offer - talented graduates emerging from our local Higher and Further Education institutions or the support provided by a thriving tech and digital community, for example – we are not seeing the impact film has in other regions. If we are to realise the opportunities the film industry can offer, then we must ensure it receives the support and encouragement it needs.

	Business Nos. (2019)	% Change Business Nos. (2010-19)	Employee Nos. (2019)	% Change Employee Nos. (2010-19)	Av. No. Employees/ Business (2019)
Hants & IoW	705	44	2000	60	2.8
Hants & Cities	680	45	1750	40	2.6
North Hants	155	63	400	100	2.6
Central Hants	335	46	500	43	1.5
South Hants	100	25	300	20	3
Solent LEP	325	38	1250	56	3.8
EM3 LEP	1235	51	2250	80	1.8

Table: Growth in the number of film, TV, video, radio and photography businesses and employees of those businesses 2010-2019 (source: HCC analysis of ONS data – based on VAT registered businesses)

The table above suggests film and related businesses are growing, with significant increases in both the number of businesses and number employed between 2010 and 2019. That is not evenly distributed, that growth is slightly greater in the North of Hampshire and EM3 LEP area. The data also illustrates that most businesses working in the sector are small, indeed and many of those working as freelancers will not be captured by the data above.

To understand how we can grow the film industry in South Hampshire Southern Policy Centre, Solent University and Fareham College brought together film professionals with those promoting the development of the creative economy across the region. Our seminar explored how we can support and promote our film sector: improving communication within the industry and across sector boundaries, building networks to stimulate collaboration, offering opportunities to develop local skills and resources, and accessing the funding to stimulate growth and innovation.

Our seminar began with presentations from colleagues at Solent University, Screen Cornwall, The Berkshire Film Office and the British Film Institute (BFI). These set the scene

by helping participants understand both local circumstances and initiatives taken elsewhere in England to support sector.

This note reports on our discussions and suggests next steps. Whilst the seminar began with a focus on South Hampshire (the area covered by the Partnership for South Hampshire – PfSH), we quickly realised that administrative boundaries do not reflect the nature of the industry. As the table above shows, businesses are spread over a wide area, and these businesses will collaborate with others without regard to those boundaries. For these reasons, this note discusses the ‘central South’, which encompasses a broader and deliberately loosely defined area running from Poole in the West to Portsmouth in the East and Winchester (and possibly beyond) in the North, whilst also including the Isle of Wight.

### **Scope**

For the purposes of our seminar, we saw film in its broadest sense as encompassing all screen industries – film, television (including children's, unscripted and high-end), VFX (visual effects), animation and games. In the central South the best opportunities may be in the area of feature film production and High End Television (HETV) production.

A successful production needs a wide mix of technical skills, as well as administrative and logistic support. These includes, for example, those providing lighting and other technical equipment hire services, postproduction, production design services, studio facilities and other essential resources. There are also opportunities for support services such as, accounting or legal services.

### **The Role of the Film Sector in the central South**

Our discussions began by exploring the roles the film sector plays in the central South. It is a complex sector, relying on a broad range of technical and other skills. Film, video or television productions will draw together a wide network of skilled professionals, for a short, intense period of activity before individuals move on to the next opportunity. These specialists are highly skilled, often working in high value, cutting edge digital and technological areas. In many cases their skills are transferable to other sectors, for example advanced manufacturing or marine technology. One participant spoke of the ‘cross-over’ between film, digital and gaming, and we could add design, graphics and a variety of other disciplines.

Participants in the seminar concluded the most important contributions the film industry can make to the local economy are:

- Promoting opportunities for SMEs and freelancers. As noted above, the majority of those working in the sector either do so on a freelance basis or are employed by small, specialist technical businesses. A thriving film industry will help grow high value, specialist businesses, thus supporting key sectors such as digital and tech., and we should not lose sight of the number of support trades and services needed Skills honed by working in film will have a wider application across other areas.

- Developing and retaining local skills and talent. Our regional universities produce high numbers of graduates in creative and digital disciplines, complemented by a strong offer in these areas from local FE Colleges. It would benefit the region if these skilled individuals could have the opportunity to grow their careers in the local economy post graduation – too often they are forced to move to London or areas such as the Thames Valley to work in their chosen field. Importantly, there are opportunities to ‘level up’ by offering opportunities to those with non-traditional educational backgrounds, or who have struggled with formal learning, indeed local VCS organisations are already promoting such initiatives.
- Opportunities to attract investment. Colleagues from Cornwall and Berkshire spoke about the value film adds to the local economy. That may be direct, for example through investment in businesses and facilities: the Thames Valley has seen major investment in studios and other facilities by multi-national media companies. Benefits may also be indirect such as encouraging tourism: for example the impact of *Poldark* on visitor numbers in Cornwall or *Game of Thrones* in Northern Ireland. Participants agreed that a thriving film industry helps promote tourism and inward investment.

## **Risks**

As the growth in businesses across the central South attests, there is a lot of film-related activity in the region. However, film in the central South suffers from a low profile, both within the wider national industry and with local decision-makers: the central South, South Coast, Solent or South Hampshire, whichever term you prefer, is not mentioned in the same breath as the Thames Valley, London or other areas with a strength in film. Nor is the case for supporting the industry recognised by local LEPs and Councils, and national bodies such as the BFI do not have our area on their radar.

Participants identified a number of risks to this low profile:

- Activity is fragmented and uncoordinated, hampering development of film as a key part of our creative economy
- We are missing opportunities to attract both public and private investment to grow film and support the businesses it depends on
- The region loses talent to other areas, notably London. Often, that talent will not return because we are not seen as an area where film is recognised and thrives
- Lack of a thriving film industry means we miss opportunities to develop supporting sectors, notably digital and technology

## **Supporting film**

Presentations at our seminar explained how other regions supported the local film industry. Naturally their approach reflects local circumstances, but in broad terms they aim to assist film-makers in accessing support (financial and other), advise on developing sector skills, advocate for the industry and co-ordinate resources and facilities across their patch. Many participants spoke of these arrangements as ‘Film Office’, and much of the discussion was

about how to establish a Film Office for the central South – with a part of that debate being about the appropriate geography.

Participants identified three priorities for support:

- Build the business case for a ‘Film Office’ in the central South. In doing this we should seek to understand the nature of the industry in our region and determine how best it could offer support for film to grow, including exploring what skills, facilities and resources are needed. A number of suggestions were made as to what the role of a Film Office should be:
  - Co-ordinate a database of regional facilities to support film-making: people, digital and tech specialists, locations etc.
  - Identify gaps in facilities and resources and plan how they are best filled
  - Develop a talent pipeline, working with HE and FE to identify needs, mentor early-career professionals etc.
  - Help establish a ‘cluster’ of digital, tech and other support businesses, to help facilitate growth and innovation
  - Identify funding opportunities, including facilitating private sector investment
  - Promote and raise the profile of the area, including identifying regional assets which may be attractive to the industry, eg. airports, ports, locations.
  - Promote a regional film festival
  - Provide a focus for collecting and sharing data on the film industry
- Attract, support and develop aspirational film, technical and digital businesses and practitioners to the central South. As part of this, we need to understand the emerging talent coming out of our local HE and FE institution and determine how best those people can be supported to establish and grow relevant businesses.
- Identify and take advantage of funding opportunities. There are a range of programmes which could help support film, including funding offered by the BFI, as well as more generic programmes run by LEPs and others which could help develop skills and businesses. However, the lack of a co-ordinated approach to film in the region means these are not always identified, as well as hampering our ability to make coherent, persuasive submissions.

Note that the second and third priorities can be addressed by realising the first.

There is also a case for maintaining a loose, informal network of those interested in the film industry, much as that which attended our seminar. They would be a useful sounding board for a Film Office, and a forum for discussing the ongoing development of film.

### **Next Steps**

The seminar demonstrated the real enthusiasm for and commitment to building a successful film industry across the central South. There was widespread agreement that the foundations for that – skilled people, a strong digital/tech sector, great locations – are

already in place, what is needed is to up our game in co-ordinating activity, identifying need, nurturing talent and promoting our offer.

The key next step is to maintain the momentum the seminar has generated. We suggest one immediate and three further actions:

- This note is shared with participants and their comments invited. Any corrections or additional thoughts can be included before it is finalised.

And subject to that:

- Key local leaders – including local elected Members, LEP colleagues and HE/FE leaders – be contacted with a short letter outlining the opportunities the film industry offers, and enclosing a copy of the final report. This should be signed by key proponents of the industry, including, we suggest, the BFI.
- A short ‘blog’, based on the final report, be prepared and published on SPC’s website and those of other appropriate hosts, and promoted through Twitter and other channels to demonstrate the region’s commitment to film.
- A small working group be assembled to discuss the preparation of a proposal for establishing a Film Office in the central South. That should include colleagues from the Solent LEP, with 3-4 representatives from LAs, HE/FE and a ‘voice’ from the film industry. That group will need to address, *inert alia*, funding for that preliminary work.

**Simon Eden**

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