	West London Economic Prosperity Board **26 May 2021**
Title	**West London screen industries opportunity**
Report of	David Francis – Director, West London Alliance
Status	Public
Urgent	No
Enclosures	N/A
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Summary

The film and screen industries have an established and growing presence in West London and are one of the sub-region's key growth sectors, currently employing an estimated 100,000 people both directly and through supply chains. There are substantial benefits to West London in encouraging the development of a thriving screen industry sector as one of the sub-region's key growth sectors.

Globally, more film and TV content is being produced than ever before, driving demand for film and TV production. This has benefited UK-based screen industries, 75% of which is based in London. The projected increase in UK inward investment in film and high-end TV is from £2.4bn in 2018 to £4.2bn in 2025[1].

This report presents work underway – as part of the focus on growth sectors through the Build & Recover plan – to scope how best to address two key constraints to the future growth of this sector: the availability of suitable space and a pipeline of skilled workers.

[1] Department for Culture, Media & Sport, British Film Commission, 2019.

The work is being undertaken by the WLA and West London Business, working with the GLA, London & Partners[2], the Department for International Trade, and the industry itself, to better understand the two constraints and develop actions as part of supporting West London's economic recovery.
Recommendations
Leaders are asked to: • **Note** and **comment on** the work underway to address two key constraints to the growth of the screen industries in West London and the proposed actions and interventions in development.

1. WHY THIS REPORT IS NEEDED

1.1 The Build & Recover plan's focus on developing West London's growth sectors has the potential to bolster not only the sub-region's economic recovery but also contribute to that of the UK more widely. The creative industries – and the screen industries specifically – has been identified by both the Dept. of International Trade and London & Partners as particularly buoyant for the sub-region in inward investment terms.

1.2 West London already has a competitive advantage in this industry. Our Sub-region benefits from superior connectivity – through its strategic location close to Heathrow and central London - and a major studio base (e.g. Ealing, Osterley, West London and nearby at Elstree, Pinewood and Shepperton), presence of international players (e.g. Sky, Discovery, Paramount, Vue, Pokemon and QVC) and a flourishing supply chain of smaller businesses also linked to key industry players based outside of West London such as the BBC.

1.3 This report presents work underway – as part of the focus on growth sectors through the Build & Recover plan – to scope how best to address two key constraints to the future growth of the Film and Screen sector in West London: the availability of suitable space and a pipeline of skilled workers

2. UNDERSTANDING THE KEY CONSTRAINTS FACING THE SECTOR IN WEST LONDON: SKILLS

2.1 In November 2019, ScreenSkills – the industry-led skills body for the UK's screen-based creative industries – in its latest quarterly 'skills barometer' survey of key industry players, found that nearly 60% of those surveyed considered recruitment difficulties a very serious or serious problem. The same survey also described dozens of different types of roles considered 'difficult to recruit to', pointing towards a skills shortage.

2.2 Further research is required to understand the scale, nature and detail of the challenge at the West London level and to inform any response. However, initial investigations suggest that, while there is established training provision relating to the screen industries across West London (spanning higher

[2] London & Partners is the Mayor's official promotional agency for London.

education, further education and specialist providers), only a small element of that provision is currently accredited by industry bodies such as Film London's London Filming Partnership or Screen Skills' 'ScreenSelect' course endorsement scheme.

2.3 The nature of many roles within the screen industries – including those seen as hard to recruit to (detailed at Appendix One) – is such that learning is often undertaken 'on the job', suggesting plentiful opportunities at the entry level and a potential role for apprenticeships as part of the broader skills development picture.

3. UNDERSTANDING THE KEY CONSTRAINTS FACING THE SECTOR IN WEST LONDON: SPACE

3.1 There is currently an estimated 500,000 sq ft in stage space in studios across the seven West London boroughs. While there is demand for an additional 1.9m sq ft across the UK, there is only some 800,000 sq ft in the pipeline. Given the industry's interest in London – and specifically West London – this suggests there is a considerable opportunity to seize.

3.2 Given the lack of large, available sites across the West London boroughs, it is likely that the greatest opportunities lie not in the major film studio spaces, rather in the mid-size studio spaces of between 30,000-100,000 sq ft.

3.3 Intelligence gathered from the sector to date suggests that West London has remained competitive as a location for the screen industries through making available temporary space - e.g. warehouses or factory space – for periods from 12 months up to 3-5 years, for specific productions.

3.2 There are, however, challenges in accessing such spaces e.g. change of use from industrial to film use typically requires planning approval and approaches to 'meanwhile' uses for sites awaiting redevelopment which might be attractive to the screen industries are not consistent across boroughs.

4. DEVELOPING AN APPROACH TO ACTIONS AND INTERVENTIONS

4.1 To improve understanding of the constraints outlined above and to generate momentum in identifying and implementing solutions to them, two roundtables were convened in April 2021, one on skills chaired by Cllr Curran in his capacity as Chair of the West London Skills and Employment Board and one on space chaired by Debbie Adler, Head of Creative Industries (North America) at the Department for International Trade.

4.2 Attendees at the skills roundtable included senior representatives from various elements of the screen industries, industry bodies and skills providers (further and higher education and specialist providers). The space roundtable included senior representatives from industry bodies, landlords, developers, temporary space agencies and boroughs' planning leads.

4.3 On skills the emerging areas of focus, to be developed further, are likely to be:

- Undertake a detailed audit of existing screen industries skills provision in West London to identify gaps and opportunities, building on the WLA's recent
- Explore how best to make prospective new entrants to the sector 'set ready', addressing any gaps in current skills provision in partnership with industry.
- Connect the current offer from further and higher education closer to the industry in West London, ensuring it reflects the sector's needs.
- Consider an awareness-raising strategy for young people to better understand the nature of opportunities within the sector and routes into them

4.4 On space the key areas of focus, to be developed further, are likely to be:

- Continue facilitation of introductions between developers and studios;
- Explore opportunities for identifying sites for smaller, flexible studio and incubator space for screen industries businesses;
- Improve understanding among local authorities of the sector's space needs and of the local economic benefits of studio developments;
- Explore the possibility of a structured approach across boroughs to temporary and 'meanwhile' use of sites for the screen industries;
- Work through the Department for International Trade to ascertain how central government could help unlock barriers to inward investment.

4.5 Leaders are asked to note the areas above as the broad basis for future work to address constraints to the growth of the screen industries as a key asset in West London's economic recovery. Officers will work with the partner organisations mentioned above to develop the identified areas into fuller programmes of work and will explore the merits of an event to launch the programme as part of this.

5. REASONS FOR RECOMMENDATIONS

6.1 As a key growth sector for West London the screen industries are an important part of the wider growth sectors focus of the Build & Recover plan and an important component in driving economic recovery. There is also wider interest from London government, industry bodies and skills providers in addressing the two identified constraints to its development in West London. The approach above provides a basis for addressing those constraints and helping to ensure benefits to West London's communities from the sector's success.

6. ALTERNATIVE OPTIONS CONSIDERED AND NOT RECOMMENDED

6.1 N/A

7. POST DECISION IMPLEMENTATION

7.1 Subject to Leaders' input at this meeting, officers will work with partner organisations to develop the approach above, reporting back to this Board on progress at a future meeting.

8. IMPLICATIONS OF DECISION

8.1 Corporate Priorities and Performance

- This report relates directly to the development of the agreed West London Build & Recover economic recovery strategy, specifically its focus on growth sectors and on skills and employment.

8.2 Resources (Finance & Value for Money, Procurement, Staffing, IT, Property, Sustainability)

- It is anticipated that the WLA's contribution to the work outlined above will be met from existing, funded officer time, working in partnership with the various organisations detailed above.

8.3 Social Value

- The potential to secure local employment opportunities - including accessible roles at the entry-level with progression opportunities – and to generate supply chain benefits for local businesses from a successful screen industries sector suggests there should be social value benefits from this work.

8.4 Legal and Constitutional References

- This work falls within the following sections of the WLEPB's Functions and Procedure Rules:

    - Representing the participating local authorities in discussions and negotiations with regional bodies, national bodies and central government on matters relating to economic prosperity for the benefit of the local government areas of the participating authorities.
    - Representing the participating authorities in connection with the Greater London Authority, London Councils and the London Enterprise Panel, for the benefit of the local government areas of the participating authorities, in matters relating to the economic prosperity agenda.
    - Representing the participating local authorities in discussions and negotiations in relation to pan-London matters relating to economic prosperity.

- The Joint Committee's role and purpose on behalf of the Participating Boroughs relates to ensuring appropriate, effective and formal governance is in place for the purposes of delivering the West London Vision for Growth and advancing Participating Boroughs' aspirations for greater economic prosperity in West London, including promoting "the Economic Prosperity Agenda", in partnership with employers, representatives from regional and central government, and education and skills providers.

- The purpose of the Joint Committee will be collaboration and mutual co-operation and the fact that some functions will be discharged jointly by way of the Joint Committee does not prohibit any of the Participating Boroughs from promoting economic wellbeing in their own areas independently from the Joint Committee. The Joint Committee is not a self-standing legal entity but is part of its constituent authorities. Any legal commitment entered into pursuant of a decision of the Joint Committee must be made by all of the Participating Boroughs.

8.5 **Risk Management**

- This report will support the West London Economic Prosperity Board to oversee successful delivery of the Build and Recover plan and its aims.

8.6 **Equalities and Diversity**

- The Build and Recover plan focuses on ensuring that West London's economic recovery is an inclusive recovery, benefiting those most impacted by the economic impact of the pandemic. The proposed approach to securing skills and employment benefits from a successful screen industries sector can assist in promoting equalities and diversity across the sub-region.

8.7 **Consultation and Engagement**

- The roundtables undertaken to date informing this work – and the stakeholder engagement undertaken outside of those sessions – has involved a wide range of stakeholders from industry, industry bodies, London government and skills providers – in addition to West London Business/Creative Enterprise Zone West, co-leading the work, working with FilmLondon, London & Partners and the Department for International Trade.

9. BACKGROUND PAPERS

N/A

APPENDIX ONE

Screen industry roles defined as ‘difficult to recruit to’[3]

Quarterly ScreenSkills Barometer – November 2019

Figure 8: Jobs hard to recruit for[3]

Film	
1st assistant director	Guest services manager
Art director	Line producer
Assistant accountant	Location manager
Assistant coordinator	Marketing officer
Assistant location manager	Post-production supervisor
Cinematographer	Production accountant
Edit assistant	Production coordinator
Editor	Production manager
Financial controller	Project manager
Gaffer	Training manager
	Unit production manager

VFX	
Compositor	Experienced environment technical director
Creature FX technical director (all levels)	Head of production
Executive producer	Graphics software developer
Experienced digital matte painter	Virtual production manager

High-end TV	
1st assistant director	Line producer
Accounts assistant	Location manager
Assistant production accountant	Post producer
Director	Post-production supervisor
Editor	Producer
Electrician	Production accountant
Finance controller	Production manager
Grip (all levels)	Prop hand
	VFX supervisor

Animation	
Animators (2D traditional high-end)	Layout artist (2D traditional high-end)
Assistant animators/clean-up artists (2D traditional high-end)	Pipeline technical director
Character FX artist	Previz
Creative director	Production coordinator
Creative producer	Rigging technical director
Head of production	Story artist
	Storyboard artist
	Writer

Unscripted TV	
Casting researcher	Production assistant
Editor	Production coordinator
Edit assistant	Production manager
Production accountant	Production secretary

Children’s TV	
1st assistant director	Location manager
2nd assistant director	Production accountant
Assistant editor	Production coordinator
Assistant production accountant	Production secretary
	Prop buyer

Severity of recruitment difficulties

More than half of respondents aware of the issue (57%) considered recruitment difficulties a serious or very serious problem that very often or always limits activities, while a further 30% of the sample perceived it as a moderate issue (figure 9).

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[3] ScreenSkills, *Quarterly ScreenSkills Barometer*, November 2019