

Review and Recommendations for the Development and Marketing of Norfolk's Screen Sector

Executive Summary Report by
Olsberg • SPI for Norfolk County
Council, New Anglia Local
Enterprise Partnership and
District Council Partners

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1.	Executive Summary	3
1.1.	About The Study.....	3
1.2.	About the Screen Sector Opportunity	3
1.3.	Research Methodology	3
1.4.	The Norfolk Screen Sector	4
1.5.	Insights from Elsewhere in the UK	7
1.6.	Key Overall Findings from the Research	8
1.7.	Investing in the Future of Norfolk’s Screen Sector	9
1.8.	Next Steps: A Staged Layered Approach	10
2.	Appendix 1 – Social Impact Case Studies.....	11
2.1.	October Studios Forging a Creative Industries Hub at Scottow Enterprise Park.....	11
2.2.	The Media Learning Company Providing an Innovative Approach to Screen Education.....	13
3.	Appendix 2 - Glossary.....	16
4.	Appendix 3 - About SPI.....	17

1. EXECUTIVE SUMMARY

1.1. About The Study

In January 2021, Norfolk County Council, its District Council partners¹, and the New Anglia Local Enterprise Partnership (NALEP)² commissioned international creative industries consultancy Olsberg•SPI ("SPI") to undertake a holistic and timely research project into the Norfolk screen sector (the "Study"). This includes film, television, animation, commercials, and related sector activity and businesses. Through seven work packages, this research has created an evidence base of the value, size and shape of the screen sector in Norfolk, and recommendations for its growth. The Study also draws from examples of approaches from elsewhere in the UK for how Norfolk can become a film location of choice for the national and international screen sector.

This document summarises the research undertaken and provides key recommendations.

1.2. About the Screen Sector Opportunity

In 2019, the UK's creative industries contributed over £115 billion to the UK economy and employed more than two million people. The size and value of these industries are growing. According to Nesta, based on current trends the UK creative industries could deliver close to £130 billion in Gross Value Added (GVA) by 2025, creating approximately one million new jobs by 2030.

Within the creative industries, film and high-end television (HETV) production spend in the UK increased from £2.1 billion in 2014 to a record £4.1 billion in 2019, before falling to £2.8 billion in 2020, largely because of the initial phase of the COVID-19 pandemic. However, the UK has already seen a very strong return to high levels of production and associated spend to meet the unprecedented global demand for screen content. The combined total spend on film and HETV production in the UK for Q1-Q3 2021 (January to September) reached £4.7 billion, the highest on record.

In addition to GVA and spend, the screen sector also: creates high skilled, productive employment that is less threatened by automation and artificial intelligence (AI); can create substantial net inward investment into local, regional and national economies; encourages valuable private sector investment into the supply chain and infrastructure; stimulates innovation; and connects and represents diverse communities and stories to audiences worldwide.

At a global level, the growth and strategic potential of the screen sector has meant that it is increasingly the subject of policy interventions designed to build sectoral capabilities and attract production.

1.3. Research Methodology

The Study was developed based on a programme of primary and secondary research.

The primary research consisted of:

- **40+ confidential consultations** with key stakeholders across policymakers, industry, sector support organisations, further education institutions (FEIs) and higher education institutions (HEIs), amongst others. These consultees were from both within and outside of the Norfolk region to gain an internal and external perspective

¹ Breckland Council, Broadland District Council, Great Yarmouth Borough Council, Kings Lynn and West Norfolk Borough Council, North Norfolk District Council, South Norfolk Council

² The Study was supported and guided by a Steering Committee made up of the commission partners, plus Hethel Innovation, Norfolk Constabulary and Norwich University of the Arts

- **A Norfolk Screen Sector Survey**, run between the end of July 2021 and end of August 2021. This survey assessed the size and shape of the sector, the impact of COVID-19 and the effectiveness of COVID-19 support packages, and future challenges and support needs. The survey received 58 valid responses. This is considered a good response given the number of nationwide sector surveys already undertaken causing 'survey fatigue' and the current lack of a fully comprehensive business directory for the sector in Norfolk. The survey also gathered further business data for the creation of a new database of relevant businesses, sole traders, and freelance individuals active in the Norfolk screen sector, which organisations supporting the screen sector in Norfolk can access, as well as potentially be used as a future public crew directory. This database is provided as a separate appendix to this document.

The secondary research consisted of:

- An in-depth review of a variety of relevant policy documents, industry reports, existing crew directories, and third-party market reports.

1.4. The Norfolk Screen Sector

1.4.1. The Size and Shape of the Norfolk Screen Sector

With regards to screen content production, Norfolk's screen sector businesses are characterised by several key players. These include October Studios, The Norfolk Film Company, Ember Films, Eye Film, Epic Studios, Genesis Pictures, Norfolk Locations, and Trett Films. Outside of key players, the county's screen content production sector is largely made up of freelancers and contractors supporting specific parts of the production process. There are a small group of businesses focused specifically on animation, video games design, and immersive reality in Norfolk, but not any of scale.

SPI's analysis of public databases operated by Creative England, Norfolk Screen and StartEast, as well as the Companies House FAME database and the Study's screen sector survey, found 672 relevant businesses and freelancers / contractors working within Norfolk. These varied from core screen content producers (i.e. film and television production companies) to auxiliary businesses which service the sector (e.g. those working in sound recording and music publishing).

These businesses were mostly based in or near Norwich and worked in screen production. Businesses are predominately micro businesses or sole-traders, with only 16 companies in the dataset having more than six employees, and only a further 24 employing 3-6 people. The vast majority (88%) work in film or television series, whilst also working across different sub-sectors (e.g. commercials and photography). They regularly work across district and county borders. Just 5% employed apprentices and 4% employed interns.

SPI's research found six production facilities in Norfolk that were hireable for productions of film, television, and commercials. Most of these were based in or near Norwich, and typically had 1-2 main studio spaces, with additional auxiliary space for set design, production offices and storage. Equipment hire and technical support was also provided.

1.4.2. Filming Activity in Norfolk

Norfolk has recently welcomed some large-scale film productions. These include *Yesterday* (2019), *The Personal Life of David Copperfield* (2020), *Spencer* (2021), and *Good Luck to You, Leo Grande* (2022). Such large-scale film productions are typically inward productions for Norfolk, meaning that the production company and majority of filming and editing was undertaken outside Norfolk, with Norfolk used principally as a filming location. While a number of Norfolk-based production companies create feature films and tv dramas, typically, local production

companies work on small scale productions focused on nature documentaries, corporate training videos and commercials for local businesses and schools.

Filming in Norfolk is currently at low levels. This is exacerbated by the fact that some current filming activity remains 'invisible', due to a lack of joined-up tracking and sectoral overview, as well as the fact that inward and local productions readily work across Norfolk's borders making it difficult to place within a discrete geography. For example, *Yesterday* was filmed in multiple locations across East Suffolk and in the Norfolk towns of Great Yarmouth and Gorleston-on-Sea. The Study's sector survey found that a quarter (24%) of Norfolk screen production businesses wholly work within Norfolk, with 76% engaging with the screen sector in London and other parts of the UK.

Inward productions typically bring their own crew with their own technical expertise, as Norfolk does not currently have a base of key technical "below-the-line" crew workforce capacity to serve these productions at a high level. This specifically refers to crew with technical expertise, responsible for day-to-day production activities, such as production staff, camera department and production design.

Sector professionals – from inside and outside Norfolk – noted a lesser challenge related to access to technical equipment, with studios reasonably well equipped and high-quality equipment available for hire from trusted vendors (e.g. Epic Studios, Ember Films).

SPI's research found 26 locations in Norfolk actively involved in hosting the production of film, television, and commercials. These were mostly historic sites, largely within the ancient city of Norwich, but also with many in Great Yarmouth and North Norfolk, as well as on coastal locations across the northern coast. These locations were owned and/or run by a mix of private landowners, district councils and heritage organisations (e.g. National Trust). In almost all cases the responsibility of marketing and managing the locations was a secondary role for those involved. For example, filming permits and management fall within the communications department of North Norfolk District Council. Norfolk Locations, a private location scouting and location management company acts as a valuable broker for inward and domestic productions, connecting them to facility and location owners, as well as crew.

Since Screen East closed in 2010, in large part due to the consolidation of the Regional Screen Agencies network into the new national sector support agency, Creative England, the East of England region has not had a dedicated screen agency or Film Office. Instead, various private sector organisations and district council departments provide services akin to a Film Office for local and inward productions (e.g. advocacy, permitting and sector development opportunities). The most active and prevalent of the organisations currently fulfilling Film Office functions is Norfolk Screen.

1.4.3. COVID-19's Impact and Effectiveness of COVID-19 Support Packages

The COVID-19 pandemic has had a significant impact on activity for those working within Norfolk's screen sector. That said, there is evidence of some gradual increase in business activity in recent months, especially those working in new digital media (e.g. video games), reflecting resilience. The supply chain and ability to create screen content were most negatively affected by COVID-19. This was particularly felt by those working in the photography sector, as well as those working on a freelance or contracted basis. Screen sector businesses accessed numerous support packages to mediate these issues, with the Self-Employed Income Support Scheme the most common.

1.4.4. Key Challenges facing the Norfolk Screen Sector

As a rural county, **geographical distance** between customers, clients and/or market, as well as connecting to others working within Norfolk's screen sector is a significant challenge for Norfolk's screen sector businesses. While efforts are being made to connect parts of the sector

(e.g. Norfolk Screen’s programming), much business activity is still largely disparate and isolated across the county.

Attracting investment and productions from outside the region is also a significant challenge for Norfolk’s screen sector. This relates to a **lack of suitable infrastructure** (studios, crew, and funding), **absence of a central fully integrated Film Office function** to promote and manage inward screen production opportunities, and **competitiveness across the UK** drawing productions and investment elsewhere.

While there is evidence of invaluable skill development by FEIs and HEIs and production companies (as explored in the two appended social impact case studies: October Studios attracting and collaborating with other creative industries in Scottow Enterprise Park, and City College Norwich’s Media Learning Company’s training programme for young aspiring filmmakers), **a work-ready Norfolk screen sector workforce is still lacking**, especially within technical ‘below-the-line’ crew roles. This is chiefly due to a lack of crew, which is exacerbated by talent moving away to pursue stronger career opportunities outside Norfolk, caused by the lack of current sustainable opportunities in the county.

The two-tier local government system – county and district level – in Norfolk provides further challenges in aligning strategic sector support. Any strategically supported intervention within a two-tier system relies on sustained support by various bodies to deliver guaranteed funding and buy-in year on year. This is a challenge when the size and designation of individual council budgets fluctuate annually.

1.4.5. *The Economic Value of Norfolk’s Screen Production Sector and Screen Tourism Sector*

SPI estimated that there was around £3.8 million of screen production expenditure within Norfolk in 2019³. Overall expenditure in the region varies significantly year to year. HETV accounts for a larger proportion of this compared to film for 2019, but film contributed more to the overall expenditure in the two previous years.

This screen production expenditure translates to £10.0 million in GVA in 2019 within Norfolk – including direct, supply chain and induced economic impact (associated with an uplift in wages). Direct GVA is calculated to be £4.8 million in 2019. These calculations found that Norfolk has around 17% of all East of England jobs (excluding Hertfordshire) in the screen sector.

Screen tourism is increasingly recognised as a key ‘spillover’ benefit from film and television production activity. There is evidence from around the world that tourists are willing to travel significant distances to visit locations featured on screen. SPI’s calculations estimated the general value figure for Norfolk’s screen tourism sector of around £1.9 million a year indicating that screen tourism is a currently small proportion compared to Norfolk’s overall visitor economy. There are significant opportunities to build this value going forward.

1.4.6. *The Social Value of the Norfolk Screen Sector*

The Study looked at social impact from two angles. First, through the talent development and training opportunities available in Norfolk. Second, through case studies that illustrate how specific production activities and approaches are leading to social impact in Norfolk.

The research found there is a range of film education courses in Norfolk from FEIs and HEIs. These include Norwich University of the Arts (NUA), University of East Anglia (UEA), City

³ This approach uses the findings from the *Screen Business 2021* report and allocates the expenditure and economic impact according to available local and regional data. For a full explanation see Appendix 2. The economic impact in terms of GVA and employment includes direct, indirect (supply chain) and induced (wage) effects.

College Norwich (CCN), a provider of Level 1-3 courses, and the British Film Institute (BFI) Film Academy courses, run by Creative Nation. These provide a mix of practical and theoretical training.

To illustrate the social value screen production is having within Norfolk, particularly around skills development, SPI has appended two case studies in this Executive Summary. The first of these focuses on October Studios. **October Studios** is based in Scottow Enterprise Park in North Norfolk. During its tenancy, the company has successfully supported the development of other resident businesses, contributing to a creative industries hub on-site through a local supply chain, and stimulating collaborative innovation. The second case study is City College Norwich's **Media Learning Company** programme. This case study shows an innovative approach to screen education. The programme successfully opens up careers in the sector and opportunities in higher education for young people in Norfolk.

While there is evidence of education providers adding real value to those aspiring to work in the screen sector, there were two main challenges they face. First, identifying and providing regular industry placements, given the small size of the sector. Second, consultations underlined that there is a key challenge in Norfolk around the aspirations of young people. As the film and television sector is small and does not currently have a significant profile, it can be difficult for young people to identify it as a possible and viable future career.

1.5. Insights from Elsewhere in the UK

Currently, there is not a fully integrated official Film Office covering Norfolk. Instead, Film Office functions to support the growth of Norfolk's screen sector and promote it externally is being undertaken by local authorities, Creative England, as well as individual businesses and charities, such as Norfolk Locations and Norfolk Screen.

In assessing the cost-benefit of establishing a fully integrated official Film Office for Norfolk within the current context, the Study profiled Film Offices elsewhere in the UK. This considered how they support the growth of their local screen sector, as well as promoting it to inward productions; how the organisation is governed and funded; and ultimately what lessons can be learned for Norfolk.

Three case studies were chosen. The first, **Screen Cornwall**, is at the very early stages of its establishment, working across a similarly rural part of the UK as Norfolk. Despite being formed in March 2019, Screen Cornwall has already managed to secure notable funding and strategic buy-in from regional and national bodies, attracted big budget productions, as well as help connect and scale local screen production companies. The second, **Screen Yorkshire**, is one of the oldest and most established screen agencies in the UK. The focus with this case study is the journey Screen Yorkshire undertook scaling their operations and overcoming two decades of changes within the political and funding landscape. The third, **Screen Suffolk**, is based in neighbouring county Suffolk. The focus here is how a Film Office may operate within a two-tier local government administration (i.e. district and county councils), as is the case for Norfolk.

While at very different stages and scales of their development, Screen Cornwall, Screen Yorkshire and Screen Suffolk provide valuable insights and lessons for a potential Film Office within Norfolk. These include the need to:

- Work closely and consistently with public and private sector partners. Through dedicated executives, officers, and boards, it is critical to ensure all parties have the same vision and mission. This means sustaining existing connections, as well as building new ones. This is reviewed formally on a quarterly and/or annual basis through governing boards, as well as through annual accounting and reporting. This ensures transparency and accountability. This is particularly important in the case for Norfolk, as a Film Office will need to work in

collaboration with the industry but also with Norfolk district councils, who have an existing engagement and financial stake in fulfilling Film Office functions

- Remain reflective and responsive to how the sector's size and shape has changed. This includes regularly reviewing what current and potential critical gaps emerge, what support is needed, what activities they want to engage in, and what will have greatest impact
- Entrepreneurialism is another shared characteristic between the three Film Offices. Where public funding remains highly competitive, it is critical that the Film Office itself constantly explores additional revenue streams. For example, by running or investing in training programmes, a Film Office will open itself up to additional funding streams, income, as well as taking a proactive role in skilling the local sector.

1.6. Key Overall Findings from the Research

- Norfolk's screen sector businesses are characterised by several key players. Otherwise, the sector is largely made up of freelancers and contractors supporting specific parts of the production process. These businesses and individuals are largely based in or near Norwich but often work in across Norfolk and in other parts of the UK
- While notable large productions have taken place within Norfolk, these are typically inward location productions. While several Norfolk-based production companies create feature films and tv dramas, local productions instead typically focus on smaller budget productions, including commercials and branded videos
- There are currently relatively low levels of screen production crew in Norfolk, with the county struggling to attract, develop and retain talent long-term
- While digital connectivity has improved, Norfolk still suffers from challenges in physical transport – both inter-regional and intra-regional. Challenges of distance are likely to persist and hamper the ability of the region to be competitive in certain screen sector segments
- There is a willingness to collaborate, but networks need to be formed and further strengthened
- Norfolk offers some Unique Selling Points (USPs) that are building a local screen sector, as well as being appealing for inward productions. These include the presence of three leading training providers (NUA, UEA and CCN) providing valuable practical skills, as well as a rich mix of heritage and natural locations, which are currently being under-utilised by screen productions
- COVID-19 lockdown measures had significant impact on business activity. However, there is evidence of some gradual increase in business activity in 2021, in part due to the COVID-19 support packages provided
- In 2019, the screen production sector spent £3.8 million into the Norfolk economy, which created £4.8 million in direct GVA in that year, and £10.0 million when indirect and induced effects are included. This accounts for around 17% of all East of England jobs (excluding Hertfordshire) in the screen sector
- Only very low levels of screen tourism currently taking place. A Film Office would help support its growth
- Norfolk district councils, landowners and private companies currently undertake Film-Office-type functions. To maximise Norfolk's screen sector opportunities and be viewed as 'film friendly', there is a perceived need among industry professionals and a number of district councils that a more evolved and joined-up operation is required. However, it is important the location owner / authority retain the revenue they already receive through permitting, have the final say on the rate and suitability of each production, as well as clear accountability and transparency around decision-making
- Norfolk faces competition from other parts of the UK that already have Film Offices, studio facilities and significant local bases of crew and production services.

1.7. Investing in the Future of Norfolk's Screen Sector

Investing in a Norfolk Film Office or Film Officer

To develop and grow the Norfolk's screen sector, SPI's overarching recommendation is that the Study's Steering Committee consider investing in the creation and operation of a Norfolk-wide Film Office or standalone film officer. The Film Office or film officer's remit would broadly be to:

- **Market Norfolk** as a location to decision-makers based outside of the county, including by liaising with national agencies, such as the British Film Commission (BFC), the BFI, and Creative England, and maintaining a website and databases of crew, locations, and production services. This would provide an active voice in attracting investment and productions from outside the region, which is key when competition is strong across the UK
- **Act as an intermediary** between screen productions and county authorities, providing expert advice, guidance and additional resource where required. This intermediary role is particularly valuable with Norfolk's two-tier government system, in aligning strategic sector support across district and county level
- **Collect and track data** on Norfolk's screen sector (including re-running the Study's sector survey annually). This data would evidence sector needs when applying / making the case for future sector support funding and investment
- **Organise networking and other industry insights and training events** for the Norfolk screen sector, enabling a more connected and 'work-ready' screen sector
- **Attend relevant national and international events** that allow for the promotion of Norfolk.

Such an intervention would enable Norfolk to take a more organised and cohesive approach to attracting and servicing screen production, and would generate a range of benefits. An effective Film Office would aim to increase production levels in Norfolk, which would lead to increased direct income to local authorities through revenue sources, such as permitting fees. However, it is not recommended that local authority revenue generation be the primary driver for such an intervention, as permitting fees must be competitive. Instead, consideration should be given to the broader strategic impacts that increased production levels would deliver for Norfolk overall. These include economic impacts, consisting of direct, indirect and induced effects, job creation, skills development, branding and increased screen tourism potential.

This said, the Film Office will not be able to address and solve all the structural issues identified, such as transportation links and connectivity. Instead, it will provide Norfolk with an invaluable *first step* in taking the key learnings from the Study and aligning existing efforts to greater effect.

The figure below details the key distinctions between the preferred option of investing in a Film Office versus the lower investment option of investing in a standalone Film Officer.

Recommended Options for Developing Norfolk's Screen Sector

Preferred Option (1) Film Office	Lower Investment Option (2) Standalone Film Officer
<ul style="list-style-type: none"> • Film Office with dedicated office and marketing budget • Two full time staff, acting as a Film Officer and Production Coordinator • Handling production queries on a day-to-day basis, and liaising and advising producers • Liaising with county services and landowners on specific production matters • Attendance at national/select international events to represent and promote Norfolk, including other digital marketing • Responsible for organising familiarisation trips for producers, and local industry events in Norfolk • Managing a locations, production service and crew databases • Facilitate sector training, networking and insights events • Engaging with Film Offices elsewhere in the UK to share best practice • Track data related to production enquiries, filming, spend and impact 	<ul style="list-style-type: none"> • One full time staff member (Film Officer) • Small marketing budget • Attendance at national events to represent and promote Norfolk • Responsible for local industry events • Responsible for working with district councils and landowners to negotiate and agree on suitable terms for filming

1.8. Next Steps: A Staged Layered Approach

SPI recommend the next step for the Study is for the Study's Steering Committee partners to explore a staged 'layered approach'.

First, the Study's partners commission a **full business case into investing in a Norfolk-wide Film Office or film officer based on SPI's research** within this report, including determining an operational model that aligns with SPI's key Film Office roles and responsibilities specification, and options and a recommendation for funding the Film Office. This would typically take 12 weeks to complete.

Alongside this, the district councils **commit to a 6-month pilot of tracking key production information within their jurisdiction**, including number and type of enquiries, spend or filming days of productions that take place in Norfolk (if and where data are available), associated administrative costs, and direct income the council received. This should then be collated together at the end of the pilot phase. At this point the partners would discuss what they learnt and what resources were required. This collated data will act as a valuable baseline for levels of screen production across Norfolk, which is currently lacking.

Next, pending the recommendation from the full business case that a Norfolk-wide Film Office or film officer is to be progressed, **issue a competitive public tender** for organisations (or individuals in the case of standalone film officer) to bid to be awarded the contract, if the decision is to have an external appointee.

2. APPENDIX 1 – SOCIAL IMPACT CASE STUDIES

2.1. October Studios Forging a Creative Industries Hub at Scottow Enterprise Park

October Studios is a television production company based in Scottow Enterprise Park in North Norfolk. During its tenancy it supported the development of other resident businesses, contributing to its creative industries hub, local supply chain and stimulating collaborative innovation

Scottow Enterprise Park is North Norfolk's largest business park. Based near Coltishall, the site stretches over 600-acres, forms part of the LEP's Space to Innovate Enterprise Zone and is home to more than 150 businesses. It has grown substantially since Hethel Innovation took over management of the space in 2015, as the landlord for a variety of tenants, mainly with innovation and STEM-focused services and products, ranging from a specialised aircraft manufacturer to a DNA testing facility.

Among the variety of businesses is October Studios, an off-shoot of October Films, an independent production services company based in both the United States and the United Kingdom, which took up residence in Scottow in 2015. The addition of the production company highlighted the business park's move towards the inclusion of creative industries.

As with many production houses, October Films is based in Central London but needed additional space to grow capacity, while still maintaining its ability to efficiently tap into the London network of people and resources. Since its launch, October Studios has facilitated an impressive list of international projects for the likes of Anomaly Entertainment and Talos Films, becoming a link between complementary services for the film sector in Norfolk and both domestic and international producers. The expansive buildings at Scottow Enterprise Park are particularly attractive to producers looking for large spaces to build workshops, house department offices, as well as construct filming sets. In addition, the park has a studio housing the only Oval Office replica outside of the United States. Outside the buildings, Scottow provides a good base for utilising Norfolk's variety of locations, including suitable backdrops for period drama, coastline and farmland.

The location of October Studios at Scottow has had a significant impact on sector development and has supported the development of the supply chain. October's presence at Scottow attracted a visual effects company called Lexhag to establish a base on site. Lexhag is an independent visual effects (VFX) studio that was started in Soho, London in 2009 with past credits including BBC's *Poldark* (2015-2019) and Netflix series *The Innocents* (2021). The company covers both on-set effects and post-production effects. With this expertise, the company is uniquely positioned to cover multiple stages of a selection of genres.

In 2021, Lexhag successfully secured £25,000 in funding through the New Anglia Growth Innovation Fund to develop and pilot a project with October Studios, supported by 8oSix and Epic Studios, which involved building a virtual production stage on site. Jodi Curtis, Brand Manager at Lexhag, talks about how the move fostered a stronger relationship with October Studios, as well as giving the creative practitioners on site the space to be creative and conceptualise on a bigger scale, in keeping with the grant's aim to drive innovation throughout local enterprises for Norfolk and Suffolk.

"The success of the pilot project helped us win our first commissioned virtual production shoot with October Studios. With this experience we aim to bring this cutting-edge method of filmmaking to a broader range of mainstream TV productions" - Lexhag, 2021

As well as attracting Lexhag, October's presence in Norfolk has contributed to the establishment of a new catering company, Crazy Pineapple Catering. Established four years ago by Scott and Clare Heapy, Crazy Pineapple was originally envisaged as a high-end private dining company. However, through Scott's previous work in film and television production in London he got to know the team at October and was persuaded of an opportunity to cater for productions at Scottow.

Today, Crazy Pineapple is partnered with October, providing catering for groups between 15 and 100 people for up to 3 meals a day on productions lasting between one and six weeks. October is the company's largest client, accounting for around 80% of its catering company business. In addition to this, Crazy Pineapple also runs a private dining company utilising high-quality local produce and are opening a vegan butcher in Norwich. Other local suppliers have seen the benefit of October's presence, especially over the timeframe of the pandemic, with spend between June 2020 and May 2021 for taxi services estimated at £15,000, off-site location fees estimated at £86,000 and local equipment hire at an estimated £181,000 growing from £145,000 the previous year.

The ripple effects of October's residency in the business park extends beyond the production sphere. October has been working with other businesses, commissioning them to provide goods and services for production. Included in this are blacksmiths and electricians who are adapting what they do to be able to meet the needs of the production sector. The agile and sprint nature of the production process has provided an opportunity for learning for these firms that can be applied to work outside the screen sector.

Co-location within a multi-sector business park provided an unexpected benefit during the COVID-19 lockdowns, when October worked with medical laboratory, Anglia DNA on site who provided rapid testing during their productions. To date, October has utilised the lab for over 3,000 COVID-19 PCR tests.

October and subsequently Lexhag have a good relationship with NUA, providing regular opportunities for work experience both on set and in post-production roles. There are a number of NUA graduates who went on to successfully secure contracts and permanent positions with both entities. Through June 2020 to May 2021, October had 81 local freelancers under contract, 18 of which were graduates or current students from NUA. Given the relative lack of work opportunities in Norfolk compared to the south east for people starting out in the sector, October has carved a pathway into the industry for those wishing to stay in Norfolk, working on both regional and international projects.

2.2. The Media Learning Company Providing an Innovative Approach to Screen Education

City College Norwich's Media Learning Company is an innovative approach to screen education. It aims to open up careers in the sector and opportunities in higher education for young people in Norfolk. It has significant social impact through its direct impact on young people and through the socially engaged projects that it works on.



The Media Learning Company (MLC) is a one-year, intensive education programme run by City College Norwich (CCN). The model for the programme is based on giving learners an experience of working in a production company – a project-based, client focused environment. The students work on a wide range of client projects as teams and as individuals. By the end of the year, they not only receive a Foundation qualification (Level 3/4) but also experience that puts them in good stead for higher education, employment in the sector, as well as setting up their own business or working as a freelancer.

The idea for the MLC originated with Frank Prendergast, the founder of Norfolk production company Eye Film. Frank wished to run a trial training programme with a group of Norfolk students to show what could be achieved with practical training in a short period of time. This was based on the insight that many graduates coming out of film and media education at the time were academically strong but lacked employability and practical skills necessary to be successful in the industry. CCN were the partner who expressed interest in taking this forward. The MLC officially started in 2012.

The MLC programme is full-time and structured like a conventional production working environment, with students expected to be in the college base nine to five, five days a week. Students work on real client briefs, budgets and work to real production deadlines. The students start by spending two weeks branding their production company, after which it is straight into live client briefs. Over the space of the year, the students work on up to 40 group and individual projects as part of the core curriculum as well as additional briefs. Students are involved in all aspects of the production – from idea development and pitching, to client engagement, production and post-production.

The pathway to a career in the creative industries can be unclear, particularly for those who have no existing connection to it. This course tries to address this problem head on by providing

a practical introduction to all the different roles within the film and television industry, as well as coaching and career contacts.

The nature of the project and roles students take on change over the course of the year, as they gain experience and confidence. The first term usually consists of whole company projects (where all the cohort work together), carefully overseen and managed by the course leaders. The second term, students often take on small individual briefs, which give them experience working in a freelance capacity. Students have increasing responsibilities in the whole company productions. For larger projects, local production company Eye Film mentor students. The students cannot be paid for their work through MLC, but as they gain experience, they often begin to undertake paid freelance work alongside the programme.

The choice of projects and clients is very important to the model's success. The course leader, Lorraine Sutherland, highlights they only take on projects where the course tutors feel there could be a genuine exchange of ideas - where students will have an opportunity to learn, stretch their skills and develop key material and experience for their CVs. Most referrals are word of mouth from previous clients or other production companies locally and clients who are simply looking for a cheaper way to deliver projects are not taken on.

Working with the Norfolk community

MLC has a long list of previous clients, including Norfolk Wildlife Trust, Norfolk Constabulary Norfolk County Council, Norfolk Museums Service, Norwich Film Festival and local charities, such as The Magdalene Group, Benjamin Foundation, Nelson's Journey, and It's on the Ball. The county has an active calendar of events and festivals which offer many opportunities for MLC to be involved including Norfolk and Norwich Festival (MLC working in conjunction with Eye Film), music festivals and previously also fashion week. The MLC offers these clients a unique opportunity, not just for a high-quality output, but also a route to engage with local young people, to hear their voices and gain their perspectives. Clients need to be willing to engage and collaborate with the students; they attend pitches, provide detailed feedback during and after production, and contribute to the students' learning.

In 2016 and 2017, MLC worked with Norfolk Constabulary to produce training films on key issues affecting young people. The Constabulary wanted to work with MLC as it provided an opportunity to engage with young people to provide a deep and authentic portrayal of their perspective on issues such as domestic abuse, child sexual exploitation and human trafficking. Norfolk Constabulary worked closely with the team at CCN to set a wide-ranging brief and ensure students were safe and supported to develop their ideas.

"It was like we were working with a focus group of young people as well as film makers" - Project Lead, Norfolk Constabulary

Students were asked to come up with ideas for films based on a brief and a budget provided by Norfolk Constabulary. Initially there were three ideas which were chosen. These covered hard hitting, yet important social issues: child exploitation, people trafficking, neglect and domestic violence. The films used a variety of approaches (including animation and slow motion) to highlight warning signs for police officers to be aware of. The domestic abuse film required the use of advanced equipment that needed to be hired in, as well as paid actors and mentoring for the students from local production company Eye Film.

All the films have been well-received and are described as 'hard hitting' by the Constabulary. The films have been shared with senior leaders within the police force and have been used in training for officers. The overall experience of working with MLC was positive for the Constabulary, not just because of the quality of the output. The learning during the process went both ways and the commissioners indicated the students were professional, thorough and did thorough research to inform their work.

"It was a really good way to work with a group of young people and it opened my eyes to the opportunity for film in policing. It is definitely something I would like to revisit" - Project Lead at Norfolk Constabulary

At the core of the MLC is the students. Each year between eight and fifteen students join the course: they are a mixture of 18 year olds coming from full-time education (A-levels and the CCN Level 3 course) and mature students returning to education after a period of work. The students report that the course helped them develop technical skills, confidence and given them insight in the range of opportunities in the creative industries and useful connections.

"The MLC helped me so much with my career because it gave me a change to try out lots of different things in the industry and see which ones I liked the most" - Former student

"The course was a great way of learning what I wanted to do in film. I found my love for cinematography" - Former student

There is a strong group of alumni who keep in touch with the course leader. Many students go on to higher education – sometimes skipping the first year of a BA course due to their level of practical experience. Others go into employment in production companies within Norfolk and elsewhere. Graduates have recently worked on productions such as *Cruella*, *Casualty* and *The Voice UK*. There are five local companies set up by course graduates that have been going over three years – including Trett Films, Jo Harrington Productions and MP Productions. Many others go on to do freelance work locally. Some students apply the professional skills they have learned in other creative sectors, such as fashion and digital games.

"My favourite part of the course was when we got to make our own TV show. When we did that I was like – I want to work in TV. And now I do! I'm a production secretary at ITV" - Former student

COVID-19 unsurprisingly has affected the MLC. The 2020 intake was eight, rather than the usual 12 and much of the project work had to take place online. Despite that, this year's students worked on 17 live projects during their course. These included another documentary made and hosted by students about the increase in child sexual exploitation during lockdown for the Magdalene Group charity. They created a short form documentary for a local children's bookshop recovering from COVID-19 (*Bookbugs & Dragon Tales*) and worked with *Unfinished Business*, exploring the role of feminist history in Norfolk through moving image in conjunction with Norfolk Library Service.

3. APPENDIX 2 - GLOSSARY

BFC

British Film Commission, an agency responsible for supporting productions located in the UK and for attracting further international productions to locate in the UK

BFI

British Film Institute, responsible for supporting the long-term growth and development of the British film and moving image industry

BTL

Below-the-line, all crew of a technical nature and non-key cast members, usually considered to be all cast and crew except the director, producer(s), screenwriter(s) and principal cast

Creative England

A not-for-profit organisation that supports the creative industries in England

Content Financing

Discretionary investments in specific screen productions, as opposed to organisations, businesses or individuals

FTE

Full-time equivalent, a unit to measure nonstandard employment, where 1 FTE is equivalent to the average annual workload of an individual employed full time

GVA

Gross value added, a monetary measure of the goods and services provided in a geographical area, industry, or sector of the economy

HETV

High-end television. This is defined as a production made at £1m or above per broadcast hour and a broadcast timeslot of at least 30 minutes

Inward Productions

A screen content production where the production company and majority of filming and editing is undertaken outside the locality. In the Study, Norfolk's county borders defines the locality

Production

The process of filming raw footage for a screen project

Post-production

The process of editing raw footage from the production stage

Production Soundstage

An area of a film studio with acoustic properties suitable for the recording of sound, typically used to record dialogue

Standard Industrial Classification (SIC)

A methodology for classifying industries, using a four-digit code

SVoD

Subscription video on demand, a digital rental model for video content

ScreenSkills

A non-profit organisation working to invest in skills and talent in the UK screen sector

UK Shared Prosperity Fund

The UK government's post-Brexit fund replacing EU 'structural funds', focused on reduce inequalities between communities across the UK. Scheduled to be launched in April 2022

Virtual production

Combining live footage and computer graphics at once to get real-time feedback using software tools

VFX

Visual Effects

4. APPENDIX 3 - ABOUT SPI

Olsberg-SPI ("SPI") is an international creative industries consultancy, specialising in the global screen sector.

SPI provides a range of expert consultancy and strategic advisory services to public and private sector clients in the worlds of film, television, video games and digital media. Formed in 1992, it has become one of the leading international consultancies in these dynamic creative screen industries.

The firm's expert advice, trusted vision and proven track record create high levels of new and repeat business from a diverse group of companies and organisations, including:

- Multi-national public authorities
- National government bodies, including culture and economics ministries, film institutes and screen agencies
- Regional development agencies for the creative industries
- Film commissions and offices
- Independent companies involved in all aspects of the screen business value chain, including studios and infrastructure supply chain companies
- National and international broadcasters
- Trade associations and guilds
- Training and skills development organisations
- Publishers and conference organisers.

With expertise in all areas of the fast-moving global creative sector, SPI offers a wide range of services, including:

- Analysis and strategic advice for building healthy and sustainable national and regional industries, and recommendations for public policies to support this
- Mapping and assessment of physical infrastructure, services and workforce
- Delivering economic impact studies of whole sector activity or of incentives
- Advice on the creation of fiscal incentives for screen productions
- Helping businesses and governments interpret the strategic implications of digital media innovations
- Business development strategies for content companies
- Feasibility studies, marketing and business strategies for small and large-scale studio facilities
- Evaluations of publicly-funded investment schemes
- Acquisition and divestment advice for owners or managers of SMEs
- International cost comparisons for small and large film and television productions
- Strategic advice on inward investment and exports for national and regional public bodies
- Analysing and explaining the links between growth in tourism and a nation's film and television output
- Providing strategic advice for screen commissions, including business and marketing plans
- Keynote speakers at industry event.