SILICON STOKE 2023

Developing Film, TV and Other Content Production in North Staffordshire

A report to identify areas for growth and approaches to levelling up the screen industries in North Staffordshire.

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Grow the Screen Industries. Build an Audience. Invest in Talent. Invest in the Future.

Executive Summary

Rigorously engaged with the history, culture, industries, and future of Stoke-on-Trent

This research charts and evaluates the current state of the screen industries in North Staffordshire to propose relative and proportionate routes to growth within the sector at a local level. Although the overall aim of the project is to propose ways to stimulate the growth of content production in the region, this cannot be achieved without the appropriate skills, talent, support, and infrastructure, or without a consideration of the audiences and stakeholders who are receptive to that content. Therefore, this report takes a rounded approach to the production and consumption of content from across the screen industries at both a local and national level. This report proposes a range of strategic and operational recommendations to increase production levels, and in doing so, increase the economic and cultural prosperity of the region. Growth in production and consumption will in turn will increase the gravitational pull of the region, making it a popular destination for established and emergent industry. By re-evaluating the recommendations of the 2009 report 'Developing the Screen Industries in North Staffordshire', and drawing together the perspectives of local stakeholders, national policymakers, strategic training providers, and adjacent industries, this research investigates how other geographical areas have developed their screen industries and pinpoints the potential of that learning for North Staffordshire.[1] The pragmatic and adaptable recommendations of this report will nurture growth in production levels, economic returns, as well as cultural, social, and civic engagement across the screen industries in North Staffordshire. Our recommendations – framed as Work Packages – focus on four key areas that will form the spine of development within the region:

> **There is a strong history of film engagement in Stoke-on-Trent [that] is complimented by an active cultural landscape of "makers"**

1) Work Package 1 – Growing the Screen Industries
2) Work Package 2 – Building an Audience
3) Work Package 3 – Investing in Talent
4) Work Package 4 – Investing in the Future

Findings

01 **Contextually,** there is a common history of film engagement within the social and cultural practice across the Six Towns of Stoke-on-Trent. Recently, the pandemic has disrupted the film and television industry, but the impact of Covid-19 on production and consumption at a commercial level is nearly eradicated, with 2019 levels projected to return within a year.

02 The challenge to growth in many sectors, from business to tourism, has been to diversify from **the industrial legacy and narrative of “the Potteries”,** which predominates in the reputational thinking around Stoke-on-Trent. While mitigating such challenges is one aspect of the Levelling-Up agenda, it is difficult to forge a new local narrative that translates at a national level.

03 Recent unsuccessful bids to become the UK Capital of Culture and a regional hub for Channel 4 reflect this difficulty. However, these bids demonstrate ambition and have led to gains that support a renewed investment in Stoke-on-Trent’s industrial and cultural diversification, as part of establishing a new narrative. This new narrative is encapsulated by the digital infrastructure of the Silicon Stoke initiative.

04 National Stakeholders, from the BBC to the BFI FAN, have placed **regional development at the heart of media expansion and diversification agendas** in the UK, in line with the Levelling-Up agenda that aims to recalibrate regional disparities in outcomes as well as opportunities.

05 Silicon Stoke represents a rare opportunity to propel the local screen industries and attract new business into Stoke-on-Trent through consolidating a USP of digital connectivity. However, the window to maximise this digital advantage is narrow because 5G and full-fibre connectivity is being installed apace across the UK and will be the norm in most cities by 2025.

06 There is much room to grow the local screen industries as it is represented by a very small base. However, these organisations are enthusiastic and produce a range of screen content **spanning feature films to animation and commercial projects.** There is also a strong vein of community engagement and support for new entrants into the industry from local organisations.

07 The majority of business secured by local companies is commissioned by clients beyond the Staffordshire borders. This illustrates one of the reasons why, **although many skilled graduates emerge from Staffordshire University (a renowned hub for digital, screen, gaming and immersive technology training), they are lost to larger metropolitan areas.**

08 The extant industry states that **robust local support in the shape of a Film Office is needed to fulfil production requirements and promote the region.** When a form of support was available via Stoke Film Office in the 2010s, **there was strong growth in content production and community engagement activities.** However, it took a decade and £2M in funding to achieve to that outcome.

09 Learning from other regions, different models of screen industry support and development have now shown alternative routes to growth. Any such route for Stoke-on-Trent should maximise the short-term benefits and strategic long-term potential of the Silicon Stoke infrastructure, the recognised quality of university training, and the local enterprises that develop talent and support start-ups.

10 **Establishing a USP, developing partnerships, and taking a broad, innovative, and culturally engaged view of the screen industries** (as promoted by the BFI, the national standard bearer) is the amalgamated route to both supporting the local industry in the short term, and building opportunities for regional and industrial growth in the long term.

Recommendations

Our recommendations are organised around four Work Packages:

Work Package One
Grow the Screen Industries

a) Establish Stoke Screen Office (SSO) - a hub for local industry, production facilitation, workforce networking, regional promotion, location management and exhibition, and a vehicle through which to shape Stoke-on-Trent's screen industry reputation.

b) Initiate a SSO Steering Group - a body to facilitate joined up thinking and a "film-friendly" ethos between different council departments and establish partnerships with other local authority and national stakeholders.

c) Engage the Local Industry – establish a biannual forum with local industry that updates data gathered in this report, communicates achievements, and shares constructive pathways to continued growth.

Work Package Two
Building an Audience

a) Employ a Screen Outreach Coordinator (SOC) to manage, promote, document, and coordinate community engagement events. The SOC would build partnerships with local stakeholders such as Film Hub Midlands on behalf of the local authority and the residents of North Staffordshire.

b) Purchase equipment to support screenings in diverse locations across the Six Towns and invest in studio space to enable community participation projects to be created.

c) Inaugurate a Medicinema hub in a local hospital and pioneer similar initiatives with local care homes to demonstrate the benefits of screen cultures to society broadly.

Work Package Three
Investing in Talent

a) Create strong partnerships between education institutions, industry, and the local authority to solidify and promote the highly marketable fact that Staffordshire University and Stoke-on-Trent College have an industry recognised excellence in producing highly skilled graduates in traditional screen production practices as well as digital VFX, animation, gaming, and immersive technologies.

b) Co-ordinate with educational providers to offer bespoke CPD courses for the local industry to maintain cutting edge knowledge in a rapidly evolving sector.

c) Develop alternative routes into the industry through vocational training and apprenticeships that support the pipeline development initiatives of local companies and educational institutions.

Work Package Four
Investing in the Future

a) Coordinate with SSO, its Steering Group, and SOC to ensure operational and strategic duties are equitably balanced between supporting the current industry and region, and long-term planning in the areas of digital media convergence.

b) Identify emergent organisations and initiatives that could be attractive to Stoke-on-Trent and the Silicon Stoke project for exhibition, innovation, creative partnering, and regional networking e.g. BFI's 'Expanded' Initiative.

c) Secure incentives and training for new business creation through partnering with the Innovation Enterprise Zone (IEZ) at Staffordshire University to support start-ups and emerging businesses in these areas of digital engineering.

About this Report

The whole video production industry is growing very quickly

Employing a historic and statistical overview of the regional and national screen industries, this report evaluates a range of contributory factors that influence sector growth. These include access to training provision, local and national policy, sub-sectors that may require different kinds of support, a consideration of similar attempts to grow content production across the UK, and the potential for partnerships to promote the screen industries of North Staffordshire.

Our methodological approach is two-fold. Firstly, we engaged in a critical analysis of the historic, cultural, social, and economic factors that have and continue to shape developments in the screen industries and cultural endeavours of the UK, with a specific focus on Stoke-on-Trent. Secondly, we documented, integrated, and analysed quantitative and qualitative data from a voluntary consultation with local industry. Taken together and supported by contemporary literature and recent reports from across the cultural industries of the UK, proposals are then made for how best to grow the local sector with a view to a holistic analysis of both the recent and long-term trajectories of the screen industries in the region.

The quantitative data offers a snapshot of the current base-level of the screen industries in the region, enabling the proposals of this report to be tailored and proportionate to the current levels of activity. The qualitative data gathered from individuals and organisations also gives a voice to a disparate community of highly skilled and committed practitioners who currently have no centralised forum or body to represent them within their local area. Due to the disparate nature of the community, and the interlinked nature of the region's different hubs, which sit so closely together, we have surveyed organisations across Staffordshire in order to bring together the most fulsome and productive range of high-quality data. While we endeavour to always focus and filter our results and findings through the prism of Stoke-on-Trent and North Staffordshire, it must be recognised that, as the Conservative MP for Stafford noted regarding Stoke-on-Trent's bid to become the UK City of Culture in 2021, 'what is good for Stoke-on-Trent is good for Stafford and the whole of Staffordshire' and we maintain this principle applies in reverse. [2]

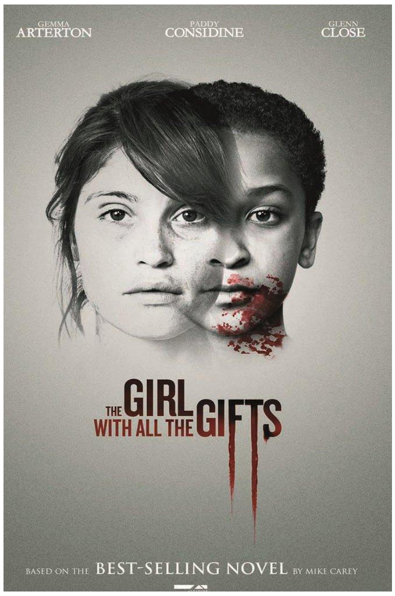
Two fundamental contexts underpin our approach to this report. The first, as the title suggests, is the Silicon Stoke initiative. The second is the current and historic content production from the local screen industries.

Silicon Stoke aims to transform Stoke-on-Trent into 'the most digitally advanced city in the UK', which the MP for Stoke-on-Trent North Jonathan Gullis suggests will enable the city to once again achieve 'the renown it already enjoys for ceramics'.[3] The infrastructure will not only enhance the operations of local companies but is designed to attract 'partnerships and investment into the city' from both national and international organisations.[4]

The infrastructure is already complete across large sections of the city, with over 100km of fibre cable laid by Fibre VX and investment of more the £40M into the project to secure both Full Fibre to the Premises (FTTP) across the city as well as fully integrated 5G coverage. As an early initiator of such infrastructure and positioning it as an investment that will help the region recover after the Covid-19 pandemic, Stoke-on-Trent is 'positioned superbly to have an early mover advantage' in multiple areas that can support business development through this infrastructure.[5] Indeed, the prospectus created to support the Silicon Stoke proposal sets out the opportunities for 'gamemaking and digital production' that will be afforded due to this technology.[6]

As highlighted later, several high-profile successes in content production during the 2010s demonstrate what is possible with the right support, advocacy, and determination from regional stakeholders in the screen Industries. In 2008, the TV documentary *Ben: Diary of a Heroin Addict*¸ screened by Sky, is noted as a breakthrough in local content production and it was swiftly followed by the locally film and produced feature *Soulboy* (2010). *The Great Pottery Throwdown* began in 2015, returning the ceramics history of the region to the spotlight, and this was closely followed by *The Girl With All The Gifts* (2016), which used a range of regional locations and attracted Hollywood A-Listers such as Glenn Close, Gemma Arterton, and Staffordshire-born Paddy Considine. In 2017, *Jawbone* starring Ray Winstone and filmed in Stoke was released, as was the Oscar winning short *The Silent Child* (2017), written and produced by Stoke born actor and producer Rachel Shenton. Unfortunately, the progress in content production has been lost due to a dwindling of support and activity. While many local companies excel in the production of content for corporate and commercial clients, with a healthy animation sector and several award-winning organisations in North Staffordshire, including Reels in Motion and Carse and Waterman, there remains a certain status connected to feature films in terms of building the reputation of the area, which is why they are focused upon in such contexts.

The history of content production success in the region demonstrates what is possible in the right conditions. The Silicon Stoke initiative has set new conditions for potential growth and development within a range of digital skillsets and initiatives, including, pre- and post-production, virtual production, VFX, gaming technologies, VR, technologically-immersive activities, wearable tech, e-sports, and the development of metaverse platforms.



The approach of this report is to learn from the history and current developments of the region and similar regions to produce recommendations for growth. These sectors of digital infrastructure and content production can support each other in developing and growing their respective sectors. This report seeks ways to develop each sector's interests, but also highlight the emergent areas of overlap and convergence, which is recognised by industry leaders.

In short, our approach is to learn about the local industry and find the maximum ways to support it, as well as look to the future and attempt to establish a route to support sustainable industry development that will lead to future progress being sustained and built upon, not lost.

Stoke-In-Focus

Overview

Stoke-on-Trent has a range of diverse cultural, historic, educational, and geographical assets that can help to grow the screen industries locally, including the region's recently upgraded digital infrastructure, its vibrant makers community, its prominent position as a crucible of training in digital production and gaming technologies, and its relative proximity to the established media hubs of Birmingham, Manchester, and Liverpool.

Analysis

Between the 2011 and 2021, the population of the polycentric Stoke-on-Trent area (the clustering of the "Six Towns" of Hanley, Burslem, Tunstall, Longton, Fenton, and Stoke-on-Trent) increased by 3.8% to 258,400. A lower population increase than the national average of 6.6%, this increase was much larger than the neighbouring Staffordshire Moorlands area (1.3%). In addition to the local community, 3.1 million people live within a one-hour drive of the city, meaning that Stoke-on-Trent has both a growing population and the potential to draw a vast number of people from the surrounding areas into the orbit of its business and tourism sectors. [7]

The legacy of 'the Potteries' has been a convenient entry point through which to promote Stoke-on-Trent as a production location through vehicles such as in Channel 4's *The Great Pottery Throwdown*. While this example promotes the area for both tourism and production, it does so through a narrative that remains tightly woven to the legacy of the Potteries and the craft traditions of this industry. Through these historic foundations contemporary Stoke-on-Trent continues to forge a reputation for ceramic excellence as the World Capital of Ceramics, however, alongside this there is also a growing appetite and necessity for diversification of the city, its industries, and its reputation.[8] While not directly related to the screen industries, this vibrant and internationally significant industrial history of ceramics remains an attractive cultural and economic facet of the city-region. It connects and promotes a disparate range of creative entrepreneurs, who can influence work in other mediums, create vibrant cultural hubs and communities, and increase the desirability of Stoke-on-Trent as a place to live. Such endeavours work to promote Stoke-on-Trent as a viable location for the production of screen content and should form part of a wide-ranging promotion of the area that incorporates the latest digital infrastructure provided by the 5G and full-fibre rollout of the Silicon Stoke initiative to explore ways to rejuvenate this history while simultaneously showcasing contemporary skills. Indeed, as Dr Joe Hazzam (Staffordshire University) proposes, stakeholders interested in the promotion of a local area 'can influence visitors or investors attitude[s]' by collectively engaging in the promotion of as wide a range of opportunities as possible, particularly through the easy connectivity of social media accounts from 'heritage places, visitor attractions, [...] businesses' among other considerations.[9] Hazzam highlights how foregrounding a range of regional narratives can consolidate and inspire the wider community and increase business opportunities. Such an approach would be a viable first step for encouraging content production within the area because the typically high-level of infrastructure needed for establishing screen industries to settle and grow within the area will take longer to implement. In short, maximise all opportunities that currently exist while planning to build for the future. Such approaches to the "selling" of an area underpins the widely lauded *GO West! 2* (2022) report, completed on behalf of the film and TV industries in Bristol by the University of the West of England (UWE).[10] Despite the obvious benefits that the

> **The traditional ceramics legacy can be used as a complimentary history to the Silicon Stoke narrative of a new digital city.**

south-west area retains, such as the presence of BBC studios, the tradition and reputation of the Natural History Unit, and the animation tradition heavily influenced by the success of Aardman studios, the *Go West! 2* reportalso elevates the diverse and smaller gains that south-west can offer to the growth of screen industries in the region. Some examples include the promotion of diversity and inclusivity in content production and audience engagement from communities traditionally underrepresented in the screen industries. As such, in *GO West! 2*, the "anchors" of the south-west area represent obvious successes but also function as foundations from which to potentially expand the screen industries locally. Learning from the *GO West! 2* report, we propose that Stoke-on-Trent similarly views the advantageous aspects of its diverse cultural, educational, and geographical qualities as the foundations upon which to build the screen industries locally; these include the regions recently upgraded digital infrastructure, its vibrant makers community, its prominent position as a nexus for training in digital production and gaming technologies, and its relative proximity to the established media hubs of Birmingham, Manchester, and Liverpool. This broad approach does not preclude the marketing of the area from foregrounding a unique selling point (USP) specific to Stoke-on-Trent and North Staffordshire, but highlights the breadth of advantageous cultural and industry foundations within the city-region. Although each of these foundations inevitably present challenges, they also present opportunities. While proximity to other media hubs could be viewed as a problem, we suggest that it should be viewed as an advantage to the region as it enables networks and resources to be shared. Training provision is vital but graduate retention represents a fundamental challenge that could change the industrial landscape of Stoke-on-Trent if resolved. While the traditional ceramics legacy can be used as a complimentary history to the Silicon Stoke narrative of a new "digital city", if the greater Stoke-on-Trent area is to profit from the inward investment in its digital connectivity then swift capitalisation must be made of the Silicon Stoke investment in light of the UK Government's Project Gigabit. An initiative that aims to have at least 85% coverage nationwide of gigabit broadband by 2025, increasing to 99% by 2030.[11] In short, within the next decade the majority of cities within the UK will have the same cutting edge digital infrastructure as Stoke-on-Trent, so gains from this infrastructure need to be made quickly. The window of opportunity is narrow, and though these technologies are fundamental to the growth of the screen industries and the digital industries more broadly, in three years this infrastructure, which is currently a USP, will increasingly be standard across the country

Takeaway

A range of initiatives must be promoted in respect of the historic and contemporary foundations of the greater Stoke-on-Trent area to support and grow the extant screen industries in North Staffordshire. Swift action and focus must also be dedicated towards leveraging the Silicon Stoke Digital City infrastructure as a defining feature of "selling" Stoke-on-Trent as a location for screen content enterprise.

Regional Screen Industry History

Overview

The value and purpose of cinema-going and screen content engagement in the wider Stoke-on-Trent area retains a quality of social and cultural cohesion as well as presenting opportunities for economic and sector development.

Analysis

Stoke-on-Trent has a proud history in film, which continues to this day. In 1910, when the Six Towns were federated to form the County Borough of Stoke-on-Trent, the first purpose-built cinemas were opened and established cinema-going as an 'important leisure activity'.[12] Within four years, 25 cinemas existed within the Potteries and solidified not only the legitimacy of this pastime but also offered a cultural and social common-ground between the Six Towns when Stoke-on-Trent was just emerging as a unified city.[13] By the 1930s and 40s, with the advent of the "talkies", the increasing number of cinemas, the rate of film production globally, and the relatively low-cost of attendance, cinema-going was the 'dominant leisure activity' in largely 'working-class' industrial areas such as the Potteries. The wider Staffordshire area has a particularly rich tradition in documentary and archival film, documenting the everyday lives of Staffordshire residents and the industrial history of the region. This includes: the workings and impact of the Potteries on the region and nation; the importance of local transport infrastructure such as canals and steam railways; biographies of notable residents such as Edward John Smith (Captain of the HMS Titanic), George Barber (proprietor and filmmaker for Barber's Picture Palace in Tunstall, opened in 1896), and Reginald Mitchell (designer of the Spitfire aircraft).[14] This documentary tradition is a local phenomenon that extends to an internationally renowned theatre history. The pioneering work of director Peter Cheeseman at Stoke's New Victoria Theatre in the 1960s and 1970s translated local stories and testimonies into artistic products for the consumption of residents.[15] Reflecting the cinematic trend to document the lives of individuals in and around the Potteries, in Cheeseman's work there is a foregrounding of working-class lives and their relationship to wider society. In 2024, the Stoke Film Theatre will mark its 50th anniversary, and although the theatre has not yet reopened following the Covid-19 shutdown, it will be reopening soon and will continue to be a symbol of the centrality of screen industries at Staffordshire University's city centre campus. This stalwart of community engagement and viewership within North Staffordshire sits alongside Staffordshire University's recent infrastructure developments including The Catalyst building and redeveloped studios housing cutting-edge hardware and software for the technical training of university students. Such locations can be new centres for growth in screen content as well as spaces and places for cultural exchange if the local authority, educational institutions, and key stakeholders from industry can develop ways to support the communities and businesses in developing new talent and engaging with new industry developments. In modern day Stoke-on-Trent, several cross-medium initiatives for cultural, social, and artistic exchange exist, and are already bringing together disparate creative industries within networks of support and business creation; these include hubs within Spode Works, Stoke Creates, and the Exchange Forum at Middleport Pottery in Burslem, the Production House at Tunstall, and the soon to be developed Goods Yard adjacent to Stoke Train Station. The local council has already established the importance of these cultural hubs as drivers of both community engagement as well as economic and sector development, and a ten-year strategy has been implemented to support these hubs. [16]

The wider Staffordshire area has a particularly rich tradition in documentary and archival film, documenting the everyday lives of Staffordshire residents and the industrial history of the region.

Takeaway

Support and help develop the expertise of cross-medium cultural hubs and creative business endeavours that exist throughout the Six Towns to promote links between local authority, industry, and educational institutions.

© Cineworld entrance, Hanley © Phil Greig 2017.

Technological Change and its Impact on Screen Industries

Overview

The seismic technological change witnessed within the UK screen industries since the 2000s has highlighted an increasingly interconnected yet diverse sector.

Analysis

In the last decade, the increased access to high-end film and photographic equipment, propelled by the introduction of the iPhone (2007) and subsequent generations of smart phones, has led to rapid change in the production and consumption of screen content. Simultaneously, a decline in traditional linear television viewing has been heralded by a growth in Streaming and Video-on-Demand (SVOD) services. This shift in the production and cosumption of screen content is most notable in younger generations and led to the BBC removing BBC3 from linear broadcasting in 2016. Although it returned in 2022, this example illustrates what Graham Meikle describes as the increasing 'convergence of established media companies, software services, user-generated content platforms, social networks and new communication devices built around ubiquitousconnection'.[17] Such convergence has been foregrounded and legitimised within the traditional film industry by the 2022 BFI London Film Festival's (LFF) 'Expanded' initiative. The 'Expanded' initiative scheduled events and exhibitions in 'immersive art and extended reality', which the LFF's literature defines as a 'new dimension of storytelling' within an increasingly broader conception of the notion of film. [18] This is a significant intervention in the traditional landscape of a film festival, because it encourages audiences, artists, and producers to engage with the emerging opportunities to innovate with screen technology and experiment with new kinds of screen cultures.

These developments around programming and production present opportunities for increased freelance work, suggest the removal of some of the barriers to entry for individual content providers, and highlight new avenues for training and upskilling. Wider access to better quality hardware and software also democratises short film production, but this does not necessarily translate into an economic return. Even digital avenues for distribution can present problems for the independent producer, when the sheer abundance of materials being uploaded can actually become a barrier to success because it means that marketing and visibility (through either traditional or non-traditional means) remains the main hurdle in attracting an audience.

Takeaway

While there is a democratisation evident in the access to equipment for production and increased access to channels for digital distribution, the major winners within this new viewing model for production and consumption are still major content producers and distributors, especially those shaping the streaming landscape, such as Amazon, Netflix, and Disney. However, media convergence is a vital new facet of screen content production and it offers opportunities for swift capitalisation.

Covid-19 Impact and Legacy: Production and Distribution

Overview

Covid-19 almost entirely shut down film production in the UK. However, when protocols were swiftly introduced to improve working practices and manage infection control, production quickly restarted supported by central government funding. The impact of the pandemic on distribution and cinema going is still being felt but the bounce-back has been strong.

Analysis

Covid-19 had an unprecedented effect on all aspects of society. In relation to the screen industries and content production, self-employed and free-lance labour was hit particularly hard as lockdowns meant that only "essential" broadcast services continued. This meant that while news and journalism services remained active, by April 2020 93% of film and television freelance labour was unemployed. [19]

The working practices of many industries have changed since Covid-19, with a greater acceptance of the viability and profitability of remote working. Many companies remain open to the shared approaches that integrate aspects of remote working where appropriate. While this is not advantageous for many trades within the freelance cohort of North Staffordshire screen industries, it is interesting that stakeholder feedback in a similar report commissioned by Bristol City Council notes 'a reduced sense of Londoncentrism' through the requirements to focus on local productivity and to be based in areas outside of the traditional metropolitan hubs of the screen industry. [20] This may prove a particularly productive shift in perspective for pre- and post-production work, as well as for game and software development.

The primary channel for government sponsorship for the re-opening of production projects was a UK-wide £500 million Film and TV Production Restart Scheme (PRS) that has now closed to new applications. Demonstrating the sense that a return to lockdowns is highly unlikely, and the lack of any further direct financial support from central government means that, from their perspective, Covid-19 is no longer a significant impediment to film and TV production. Nevertheless, a number of reports recommend the implementation of good working practice adopted in the wake of Covid-19.[21] Locally, because there is no central record of active companies or individuals within the area, it is impossible to know the full effect of the pandemic on freelancers and screen industry professionals in the region. Addressing the lack of an active database should from part of the operational tasks of a Film Office.In relation to the distribution of screen content, the legacy of Covid-19 remains most tangibly felt in cinema-going attendances and, consequently, the number and variety of films receiving full cinematic releases – including those with simultaneous SVOD releases. Cinema attendances in the UK have remained within a 15% variance across the two decades of new millennium, between roughly 156-176 million ticket sales per year. During the first year of the pandemic, with the most stringent and longest lockdown protocols in place, cinema revenues fell from £299 million to £55 million.[22] Since then, industry experts and reports cite a 20% to 30% decrease on cinema attendance in 2022 (projected forward) in comparison to the pre-pandemic attendance in 2019.[23] That rapid level of response has emboldened 'almost every advertiser' to return to the cinema, suggesting that the level of attendance is due to return to pre-pandemic levels in the near future. [24]

Chair of Universal Filmed Entertainment Group, Donna Langley OBE, states that the move to SVOD releases during lockdowns, and then the simultaneous SVOD and cinematic releases in the early periods after lockdowns were a necessary decision in order to sustain the viability of completed productions.[25]

Addressing the lack of an active database should from part of the operational tasks of a Film Office

However, some releases, such as *No Time To Die* (2021), were held back until available for a full cinematic release and, in 2022, *Top Gun: Maverick* was likewise held from streaming services for 120 days in order to maximise the cinematic impact and revenue of the production. Langley's view of such decisions, in a global context, corresponds with the Digital Cinema Media's UK report that an increased level of discernment within cinemagoers now governs certain market trends and decisions concerning what productions gain a cinematic release.

While the age profile of the average cinema-goer in the UK has decreased post-pandemic, it is believed that an 'older' audience will return 'for the right film'.[26] Although concerns about contagion within spaces where individuals are required to remain for a number of hours might obviously dictate that older populations would be less likely to return, the viewership of *No Time To Die* not only testifies to this discerning quality of older audiences, but also speaks to the wider gravitational pull of such long running franchises. Likewise, it is the Marvel/DC franchises that are leading to the more general decrease in cinema-going age.

Although cinematic release is not aided by the fact that, in the UK, cinemas take a larger portion of the ticket sales than in other territories making cinematic release always a fraught endeavour, it remains that major content producers and distributors envisage a strong future for cinema attendance after the pandemic, dependant on the content. As Langley argues, the 'joy' of the 'theatrical experience' is both as a social occasion and in the cementing of an artistic product within a 'cultural zeitgeist'.[27] However, the reality on a commercial scale is that it is the productions with highest levels of franchise marketing, visual effects, and pre-established audiences that gain the most regular cinematic releases, and with more theatrical releases due in 2023 than 2022, that trend is likely to continue and increase.

Takeaway

The communal aspect of the cinema-going experience has historically been an important draw for audiences in Stoke-on-Trent and national and international trends suggest it is showing a strong and welcome return to pre-pandemic levels. The impact of Covid-19 on employment levels and content production within the local screen industry is difficult to define as little evidence exists locally for pre-pandemic levels of activity. This lack of knowledge should be addressed at a local level, not only in case of another shock to the industry, but to gain data that informs local authority support the building of a network that can sustain, support, and monitor the growth of the local industry.

UK City of Culture Bid and Links to Regeneration

Overview

The UK City of Culture 2021 (CoC) bid, which immediately precedes the implementation of UK Government's Levelling Up initiative, needs to be considered for its impact on the regeneration, cultural growth, infrastructure developments, and rejuvenation of the perception of Stoke-on-Trent.

Analysis

In March 2017, Stoke-on-Trent announced it would be competing for the 2021 UK CoC, in what the then Labour MP for Stoke-on-Trent North called the city's attempt at 'stepping out of the long shadow of its neighbours' – namely, Manchester, Birmingham, and Liverpool.[28] The thrust behind the bid was to ensure that the World Capital of Ceramics was adapting to meet the challenge of the post-industrial economy and proactively reshaping the 'outdated perceptions' that were 'holding [Stoke] back'.[29] Defining the key characteristics of the City as 'creative, skilled, practical, innovative, ambitious, and rough-edged', during the course of our research we have found a number of businesses that were specifically drawn into the area during this period of campaigning based on the recognised shift that was taking place within the creative industries.[30] That shift presented a vibrant and positive outlook to creative enterprise in the area and demonstrated an increased recognition of the economic, social, and cultural benefit of the region's creative industries. Although the failure of the bid was confirmed in December 2017, the legacy of the bid continues to have an impact through regeneration projects and cultural hubs across the city – not least that of the Spode Works, the location of one of the businesses that was attracted to the city in the run up to the CoC bid.

The Spode Works and the surrounding area is one such cultural hubs, being a home for digital businesses, screen industry stakeholders, retail, and leisure pursuits. Both small and medium sized start-ups have taken up residence in the cavernous and somewhat ramshackle setting of this 230-year-old former ceramics factory Spode. The history and nature of this location establishes a synergy between its residents and the modern face of Stoke-on-Trent's legacy as a city that makes 'art from dirt'.[31] Behind the Spode Works is The Bank at 1 Campbell Place that houses the registered offices of a number of film and screen-based organisations, although only Carse and Waterman have a presence in the building, while on the other side of the city's ring-road from Spode sits the central train station and surrounding areas which are already benefitting from massive inward investment and earmarked for an increase in connectivity.
The station will be part of the integrated HS2 route linking the north-west and south-east, from Manchester through Birmingham to London.[32] This development will not only improve links regionally and nationally, but it will also draw investment into the region. The train station currently backs onto Staffordshire University and is flanked on its east side by the Capital and Centric Goods Yard development. Alongside Staffordshire University's investment in high-end teaching facilities such as the new £40 million Catalyst building and associated gaming and production studios, the Goods Yard will also be a space of creative artists and small organisations as well as living and retail premises.

Cumulatively, this small area stretching from Spode to Staffordshire University, a 5-minute walk across the A500, will be a hive of transport, education, business, culture, retail, and investment primed to take advantage of the new digital infrastructure of the Silicon Stoke project. The area also comprises several diverse organisations surveyed by this project as part of the screen industries, from training video providers, to feature film producers, and screening venues. Therefore, this location would be a prime area to establish a focal point for the screen sector in and around North Staffordshire, offering easy

> Businesses were specifically drawn into the area [...] based on the recognised shift that was taking place within the creative industries.

rail and road access as well as provision for training, meetings, and networking.

Investment in culture and leisure activities that can be actively seen in the development of the Spode Works, and its northern sister project in Smithfield, are markers of regeneration - revitalising the area in a manner sympathetic to its history and in line with the perspectives of residents and businesses. Typically, cycles of regeneration create a strong potential for gentrification to occur, wherein a change in the resident and business demographic of an area attracts and caters for a more affluent clientele. While seemingly positive in terms of introducing increased spending power into the local population, gentrification must also be recognised for the threat that it poses to current residents (both business and residential), with the potential to drive up rent prices that can force-out existing residents and business. This kind of exodus can have a detrimental impact on the vibrancy of community initiatives and cohesion, with niche sub-sectors particularly at risk of being impacted by such activity, potentially leading to missed opportunities for emergent companies.

Takeaway

Despite failing in the bid for CoC 2021, investment and growth from that bid continues to have an impact on the direction of the creative arts in the city-region. Building on this, developing cultural areas to help grow content production should be carefully managed in consultation with occupants. Networks should be built, and data gathered to establish the current level and scope of industry activity. Only then should specific proposals to support and grow the sub-sectors present in those areas be initiated. An area should not succumb to incremental changes that remove the cultural and social mix upon which a location's appeal was first established. [33]

Levelling-Up Stoke-on-Trent

Overview

The UK Government's Levelling Up paper (2022) sets several 'medium term mission' statements a completion date of 2030, suggesting that the issues attempting to be resolved by the Levelling Up agenda will take many years to resolve.[34] This demonstrates that a sustained strategic approach and leadership is required in order to recalibrate regional inequalities and the financing available for Levelling Up will fall very far short of the impact of austerity measures.

Analysis

David Etherington, Martin Jones, and Luke Telford (2022) summarise Levelling-Up as an agenda 'to raise living standards, opportunity, and prosperity across the UK' and they highlight that Stoke is 'identified as a priority area' due to a 'structural cocktail of disadvantage including low paid jobs, welfare erosion, indebtedness, destitution, and food insecurity'.[35] This cocktail of disadvantage and the relative prosperity of metropolitan areas, has lead to Stoke-on-Trent becoming characterised as a "Left Behind" area. Such areas are defined by ' social and economic decline' and often see densely populated areas suffering from numerous indices of deprivation, including 'high prevalence of poorly paid employment opportunities, crime, poor mental and physical health, political dissatisfaction, as well as lower than national average rates of educational and skills attainment'.[36] As Martin et al (2021) highlight, these are entrenched issues that riddle the Stoke-on-Trent social and cultural landscape and will require long-term, sustained, and responsive actions, which cannot be outsourced to "the market":

Levelling up is not a one-off policy challenge, but an ongoing process that will take many years, even decades, to achieve. Just as the current problem of left behind places has been long in the making, so it will be long in its resolution.[37]

The Government's 2022 paper states that to level-up means 'giving everyone the opportunity to flourish' by 'living longer and more fulfilling lives, and benefiting from sustained rises in living standards and wellbeing'.[38] This opportunity to 'flourish' can be considered in multiple ways and the advantages that a thriving screen industries sector would bring to North Staffordshire would undoubtedly fulfil an aspect of this levelling up agenda. However, previously nationwide initiatives including Regional Development Agencies of the late 1990s, Local Enterprise Partnerships, and the Northern Powerhouse concept, have all attempted to bring together 'regional stakeholders to try and drive economic growth and prosperity'.[39] Yet these initiatives and a decade of austerity in the 2010s has done little to address Stoke's 'cocktail of disadvantage'. Indeed, as Etherington et al highlight, 'Levelling Up fund does not come close to offsetting the money lost through austerity', because 'austerity in the North amounted to around a cut of £413 per person; while the investment provided by the Levelling Up fund to the North in 2021 amounted to a mere £32 per person'. [40]

It is clear then that structural inequalities have deeply affected the region, its communities, and its business activities. Indeed, drawing on the House of Commons' (2020) findings,[41] Etherington et al note that 'Stoke-on-Trent now regularly features in the bottom 10 UK cities for business start-up rates; number of businesses; residents with high qualifications; low property values and housing affordability. However, successes in the short term have been evident in the city-region.[42]

In October 2021, Stoke-on-Trent secured three funding pots for regeneration projects in the first round of the Levelling Up fund - the most for any UK city. One of those was £60m for the Good Yards redevelopment noted already. This 'gateway to the City' is located next to the train station and will enhance the vibrant urban quarter encompassing 174 apartments, restoring the Vaults Warehouse, establishing a water taxi via the canal, as well as a new "Pavilion" building for work and leisure spaces and a 150-bedroom hotel.[43]

> An easing of business rates for companies engaged in the screen industries, could go a long way in attracting businesses to the area and supporting Start-Ups, especially when combined with the appeal of the full-fibre gigabit network.

As Etherington et al state, the aim is to 'encourage inward investment to create higher paid jobs, stimulate economic growth post COVID-19 and steer the city-region into a new age of enhanced opportunity and relative prosperity'. [44]
While this regeneration plan is clearly defined, it is broad in its scope, susceptible to some of the challenges of encroaching gentrification, and not entirely focused on developing one specific industry or sector within its remit. As a contrasting example, developers Capitol and Centric have recently been engaged by Liverpool council and the Liverpool Film Office to redevelop the city's Littlewoods building into state-of-the-art film and television studios. As this report will highlight later, at this stage such endeavours would be high-risk within Stoke-on-Trent, and are not a recommended course of activity for the city-region. However, that does not negate other opportunities and specific proposals that should be considered to encourage clusters of content producers and developers to populate premises within vibrant new developments if the city-region is to promote itself as a supportive location for content production. For example, an easing of business rates for companies engaged in the screen industries, could go a long way in attracting businesses to the area and supporting Start-Ups, especially when combined with the appeal of the full-fibre gigabit network.

Takeaway

Cumulatively, "Levelling Up" should be considered as a starting point for growth and future investment. Within this, productive developments can be made to begin the process of developing the screen industries and its sub-sectors over the short term, with a view to a concerted and sustained effort being made to support sector development in the mid to long term.

Policy Frameworks of Key Stakeholders (BFI)

Overview

Understanding the concerns of national stakeholders can help shape local initiatives. Consideration of the policies, initiatives, and national trends is vital to develop content production levels in the city-region, with media-convergence offering an emergent area for swift development.

Analysis

In 2022 the BFI announced *Screen Culture 2033*,[45] a strategy that was designed to build on the work of its predecessors, BFI 2022 strategy, *Supporting UK Film* (2017-2022)[46] and the *Film Forever* project (2012-2017).[47] The core principles across these initiatives have remained consistent. In 2012 they were:

- **Expanding education and learning and boosting audience choice.**
- **Supporting the future success of British film.**
- **Unlocking our film heritage.** [48]

In 2022, *Screen Culture* more rigorously engages with the same territories:

- **Growing and caring for the BFI National Archive, the world's largest film and television archive.**
- **Offering the widest range of UK and international screen culture to audiences through our online and in-venue programmes and festivals.**
- **Using our knowledge to educate and deepen public appreciation and understanding of film, TV and the moving image.**
- **Supporting creativity and actively seeking out the next generation of UK creators.**
- **Working with the government and industry to ensure the continued growth of the UK's screen industries.** [49]

The main development of the most recent report is the recognition of the internationally significant position of the British film archives, the need for environmental and social sustainability, and an expansion of the traditional boundaries of "film" – that is, an appreciation of "screen" as encompassing diverse engagements with film and filming in various forms. Combined with the 'Expanded' initiative's broader approach to "film" at the BFI LFF 2022, this is an important step forward in industry-wide recognition of media-convergence. North Staffordshire initiatives should be sensitive to the this internationally recognised new direction in terms of what film and screen content relates to, specifically, how the region can maximise this industry development alongside the newly established fibre and 5G infrastructure of the Silicon Stoke initiative.

Alongside this expanded new direction of screen content, which aligns with the BFI consistent core principle of supporting production across a varied portfolio of screen activity, there are two other core principles that link this last decade of BFI strategy proposals to the sustainable and long-term growth of the screen industries:

01 Heritage
Celebrating heritage at both local and national levels.

02 Audiences
Developing audiences from early years education to community projects.

> **North Staffordshire initiatives should be sensitive to this internationally recognised new direction in terms of what film and screen content relates to, specifically, how the region can maximise this industry development alongside the newly established fibre and 5G infrastructure of the Silicon Stoke initiative.**

The BFI has established several sub-initiatives that support these core principles. Of note is the BFI Film Audience Network (BFI FAN) whose strategic mission is to develop audiences and celebrate film heritage. The BFI FAN is an umbrella initiative that encompasses a nationwide partnership of Film Hubs – the local hub for North Staffordshire is the Film Hub Midlands (FHM). The BFI states that 'film hubs are centres of expertise and support that connect cinemas, festivals and creative practitioners', and that they 'help people across the UK to access a broader range of films and use local knowledge to help film exhibitors'. [50]

The FHM have identified Staffordshire as prime for investment in the development of audiences and community initiatives. An application is already underway and has been submitted to the BFI FAN funding network by the FHM to initiate community development projects and establish several local facilitators. A decision on this funding application is expected in the first half of 2023. If successful, it represents a potential partnership for building an inclusive screen culture within North Staffordshire, which can also help facilitate new avenues for content production.

Takeaway

The BFI is the national standard-bearer for the film industry and an internationally recognised body of high esteem. Their policies and strategies are encouraging a diversified and expanded notion of what "film" means, how it is engaged with, and what communities can do to support local and national engagement with the screen industries. This recognition of the importance of media convergence and of building audiences to support content production and distribution should be strategically incorporated within Stoke-on-Trent's attempt to grow the screen industries.

Policy Frameworks of Key Stakeholders (BBC)

Overview

The defining institution in the media industries of the UK has plans to de-centralise its operations from London, but the major winners are established hubs in other metropolitan areas, such as Birmingham and Manchester. An increase in screen industry activity on the borders of Staffordshire will have a "trickle-down" effect, but direct investment in the local area is unlikely.

Analysis

As 'an essential part of the UK's culture, democracy and creative economy', it is important to consider the impact and role of the BBC's policies and strategies in terms of local and national development and support for the screen industries, particularly in broadcasting.[52] Despite the rise in SVOD, non-linear viewing (which includes the BBC iPlayer), and the rise in subscription services,[53] the BBC remains 'one of the most-used UK public services' and a cultural and civic lynchpin with 'over 90% of UK adults and 80% of young adults us[ing] the BBC on average per week', and 'almost 100% of adults [...] every month'.[54]

Significantly, in 2021 the BBC published a strategic proposal designed to further de-centralise programming and provisions from the organisation's hubs of London and Media City in Salford, Manchester. This proposal - 'The BBC Across the UK: 2022-2027' - frames the post-Covid media landscape as a challenging one characterised by an accelerated 'decline in local media business models', but one that conversely offers increased focus on local opportunities due to a strengthened 'need for local news and information'.[55] The BBC suggest that 'getting closer to audiences across the UK, its Nations, regions and communities' as well as 'stimulating the UK creative sector' are two of the central pillars of its forward planning.

The benefits of these initiatives in relation to the screen industries of North Staffordshire will primarily be a "trickle-down" effect. The BBC will consolidate projects in the metropolitan areas adjacent to Stoke-on-Trent, which may have a positive impact on either the industries or the availability of work for freelancers from North Staffordshire. A centre of excellence in production is to be developed in Birmingham, consolidating the BBC's presence in that area into one creative hub in Digbeth – similar but on a smaller scale to their Salford campus. Alongside the production facilities in both these areas, which sandwich the Staffordshire boundaries to the north and south, the BBC will also expand the 'Writersroom' in Salford, which could be a useful area of interest in developing local talent from North Staffordshire as part of a pipeline of content developers who will tell stories from and about Stoke-on-Trent and North Staffordshire.

In their 'new "Pan-UK commissioning model" that situates more decision-making outside London', the BBC is attempting to rebalance TV commissioning power across the UK. While the corporation is keen to show its increased presence and

> Our programming across all genres will portray stories from all corners of the UK, including current commissions over the next few years set in Birmingham, Belfast, Bolton, Bristol, Cardiff, Cumbria, Cornwall, Coventry, Edinburgh, Faslane, Gateshead, Halifax, Liverpool, Leeds, Manchester, Middlesbrough, Mansfield, Newcastle upon Tyne, Nottingham, Norwich, Port Talbot and County Down.[51]

'BBC Across the UK' establishes a commitment to support hinterland regions between metropolitan areas, by initiating 'talent, skills and development opportunities at a local level – especially in the North and Midlands'.[56] BBC Three is singled out as the driver of this commitment by building on its 'Northern Voices' scheme, enabling and supporting 'Midlands producers to champion local companies who want to tell young, unique regional stories and to develop a talent pipeline from the region'. [57] As a local example, although Birmingham has long held links to the BBC through its historic Pebble Mill studios and later its Mailbox location, it is the commercial and critical success of *Peaky Blinders* that has done more to shift the image of this deindustrialised city as a place of interest and expertise in television and film production. Such examples, although not easily repeatable, show the value of nurturing writers and creative storytellers (Steven Knight for the *Peaky Blinders*) and the impact that can have if successful. Much like *Doc Martin* does for Cornwall, *The Country* does for The Cotswolds, or *The Responder* does for Liverpool, in terms of marketing of an area as a destination for tourism and for production, the value of storytelling to the growth and development of the screen industries in an area should not be underestimated. Supporting talent in terms of content development can help to drive content production and shift the reputation of a location – it should, therefore, also form part of the plan to grow the screen industries in North Staffordshire. *The Great Pottery Throwdown*, as noted, is an example of high-end production based on the specificities of Stoke, that draws exclusively on a historic idea of the region – new generations need find new stories and narratives to tell that drive interest and production activity in the area.

Takeaway

The BBC's de-centralisation strategy suggests that the corporation is looking for regional voices. This openness to stories from and about underrepresented groups in the media landscape is an opportunity to promote storytelling about Staffordshire. Supporting such endeavours on a local scale is best done through initiatives that engage with people not already established within the industry, and audience building is part of this as it offers the opportunity for new entrants to engage with screen content production. North Staffordshire's two Universities could contribute to developing a pipeline of local storytellers alongside several local film festivals.

© Vivid Flow, Interview with Nadège Rochat - cello soloist

Policy Frameworks of Key Stakeholders (Channel 4)

Overview

The ambition of several bids by Stoke-on-Trent to further the cultural industries in the area should now be repurposed towards locally attuned endeavours that seek to build the area and its industries from within, drawing learning from previous bid experience.

Analysis

In 2018 and after the failure of the City of Culture bid, Stoke-on-Trent lost a second opportunity to bring a large cultural boost to the city when the bid to bring a Channel 4 creative hub to the city. Channel 4 was moving out of London and establishing a new HQ and two regional hubs. Leeds won the HQ bid, with Bristol and Glasgow chosen for regional hubs.

While this was a second disappointing blow to the city as a place that could grow to compete with larger cities in terms of their screen industry influence, it was perhaps to be expected. Stoke-on-Trent had not made it into either of the final short-listing phases where detailed negotiations were undertaken with the national HQ options of Birmingham, Leeds, and Manchester, or with the three cities vying for the two Creative Hubs - Bristol, Cardiff, and Glasgow. Taking an objective view of this, all six cities on these shortlists represent long established or highly marketed locations of screen industry production in both reputation and activity, and as we have suggested elsewhere in this report, pitting Stoke-on-Trent against some of these major metropolitan cities was an ambitious move.
Channel 4's transparency highlights this. They state that Bristol was chosen for one hub in part due to its proximity to Cardiff, meaning that Cardiff could also benefit and Channel 4 could still profit from the talent available in South Wales. Bristol also offers 'the opportunity to build on a thriving television production sector in the city, which has world-renowned factual producers and also has strengths in areas such as animation and digital production'. [58] Likewise, Glasgow was chosen for its 'incredibly well-established and vibrant independent production sector' and to 'help develop the production and creative sector across Scotland'.[59] However, losing out to media saturated metropolitan areas and cities that offer gateways into whole nations within the UK should not stifle Stoke-on-Trent's ambition. Indeed, the ambition in applying for these lucrative and prestigious prizes is to be commended and success in either venture would have undoubtedly secured rapid growth in the local creative sector in a diverse and far-reaching way.
Similarly, we can learn from Channel 4's rationale for their decisions about where the organisation believes innovation, growth, and development will occur in the coming decades.
Leeds was chosen because its locality is 'extremely well-positioned to be a base for collaboration with producers and creative talent across other cities' as well as establishing 'partnerships with other organisations and educational establishments'. Alongside this, Leeds has a 'thriving digital industry and a strong digital talent pool' to support Channel 4's new Digital Creative Unit. Bristol offers the opportunity to 'accelerate the growth of the creative cluster around South West England', while Glasgow presented a favourable opportunity to 'work with the sector and the region's educational establishments to grow the pipeline of new talent into the production and broadcast industries'.[60]

> the future of creative and screen industry developments will be marked by partnerships between organisations at regional levels that form clusters or hubs of mutually supporting activities based around the industrial specialities of that locality.

Takeaway

Channel 4's decisions suggest that the future of creative and screen industry developments will be marked by partnerships between organisations at regional levels that form clusters or hubs of mutually supporting activities based around the industrial specialities of that locality; the establishing of productive ties between education providers and industry; and the recognition of a convergence and necessary integration of digital and computing skills within varied spheres of production, distribution, content management, and promotion. These future avenues of sustainable growth and development should guide strategies in North Staffordshire, and in these partnerships, the proximity to larger metropolitan areas becomes a benefit and not a hurdle to overcome.

Revisiting the 2009 Report

The Findings of the 2009 Report

The 2009 North Staffordshire Television and Film Report findings stated that:

The regional base-level of activity was low, but ambitious.

There was a disconnect between industry stakeholders and the local authority, which some could be remedied via a Film Office that would supersede Screen West Midlands (the Regional Screen Agency at the time).

Infrastructure positives included a wealth of diverse locations and excellent transport connections.

Recommended infrastructure improvements included screening facilities.

The region produces a wealth of skilled graduates but cannot retain the due to a lack of industry and the pull of larger metropolitan centres.

Many of the issues highlighted in 2009 persist in some form, however, it is difficult to compare in detail the findings of the 2009 report due to the length of time that has elapsed. The quantitative and qualitative data gathered in 2009 has since been deleted, in line with responsible Data Protection and Privacy practices. Therefore, this report cannot illustrate in detail the regional trajectory of the local screen industries across this period, particularly in terms of the companies' growth, turnover, employees etc. We can reflect on the information gathered through our own data collection and trends noted at national levels. Some consolidation of screen industry activity does occur through other neighbouring organisations, notably through Film Hub Midlands (in cooperation with Birmingham's Flatpack Film Festival). However, the level of data gathered through such bodies will be specific to projects they have helped to fund. Therefore, such data is also a partial picture and risks missing industry activity in the wider Stoke-on-Trent area. This is a fundamental issue to resolve in terms of demonstrating the trajectory and performance if the screen industries within the city-region.

Takeaway

To understand, track, and aid the development of economic and demographic aspects of production and access within the local screen industries, regular reviews must be undertaken by a central body (be that a Film Office or other body) to log and report on these matters. This will track regional development and give stakeholders and policymakers the ability to recommend and enact initiatives that can drive growth and access within specific areas, be that sub-sectors of the screen industries, or in the support of diversity in the training and new entrants to the industry.

Evaluating the Recommended Actions of the 2009 Report

Overview

Evaluating the previous activities designed to grow the screen industries locally, in order that terms of developing growth within the screen industries sector going forward, because of centralised local authority support.

Analysis

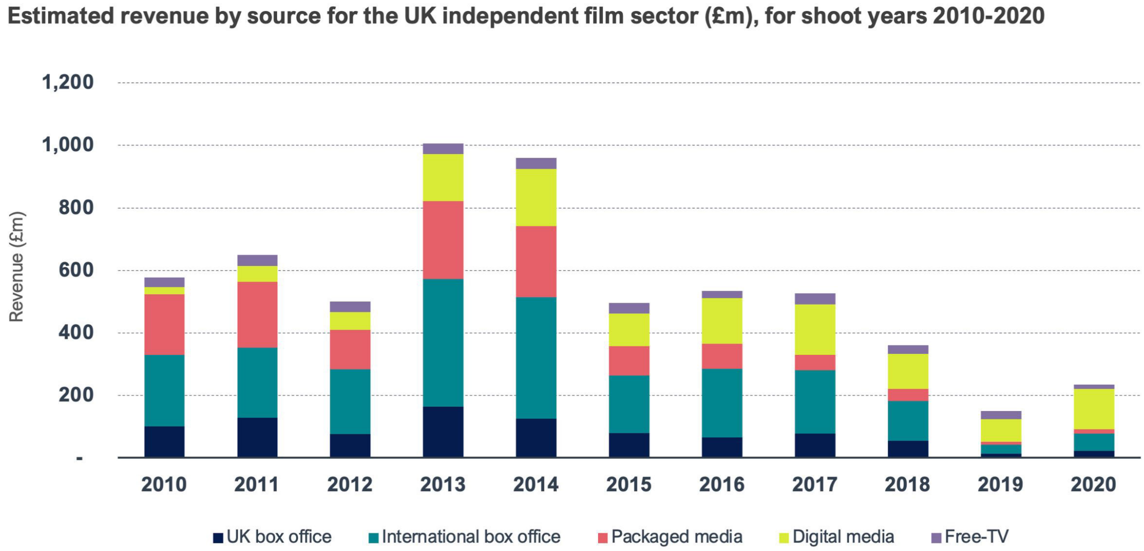
The primary recommendation in 2009 was to establish a North Staffordshire Film Office. It was proposed that the right blend of 'long-term' action in 'support services', as well as 'the creation of financial and in-kind incentives and an entrepreneurial approach to promoting and encouraging film production' could rectify the challenges identified in the report's findings.[61] This was a responsive and appropriate recommendation. Indeed, our recommendations call similarly for a long-term commitment to regular engagement with the local industry. However, while initiatives were implemented before and after the 2009 report in a range of production support and engagement initiatives as part of the Stoke Film Office, as explained below, their longevity was not secured and these activities slowly ceased.

Stoke Film Office

By the time that Stoke Film Office (SFO) was initiated, there were already several screen successes within the city-region, not least the feature film Soulboy (2010) and the Sky screened television documentary *Ben: Diary of a Heroin Addict* (2008). This shows that even without a formal Film Office successes are achievable but also that for those successes to be built upon and for the benefits to cascade through the local region, industry-focused investment and development must follow closely.

Unfortunately, there is little documentation available regarding this first iteration of the SFO. The primary trace of the SFO is a Facebook page active between 21 May 2012 and December 2017, which directs visitors to a government website - http://filmoffice.stoke.gov.uk.[62] However, internet archives yield no images or screenshots of this website. The Facebook page states that 'Stoke Film Office is run by Stoke-on-Trent City Council with the aim of promoting the city as a filmmaking location and to maximise opportunities from incoming film and TV production enquiries'.[63] The activity on that Facebook page supports this summary, but there are also a number of instances where community projects and engagement are also highlighted. Our research, gratefully supported by the Creative Industries Development Manager at that time, Mr Marc Wootton, has discovered a trove of varied activities were undertaken by the SFO during its existence, activities that were facilitated by Mr Wootton and a team of council co-workers. This is vital information in terms of growing the screen industries because lessons must be learnt from the previous iterations of centralised local authority support.

By the time the SFO activity dwindle, the region had produced more than 10 productions that aired on the BBC or Sky as well as a number of feature productions. The highpoint of the SFO appears to be around 2017, with the Facebook page particularly highlights the premiere of local feature film *Jawbone* (2017) starring Ray Winstone as well as the opening of a newly developed £250,000 studio space at The Production House (home of local production company Reels in Motion). However, our research suggests that, with the production of feature films occurring in a period two years prior to release, the levels of production had already started to dwindle in the period from 2014-2016. This is support-



ed by testimony from Mr Wootton and echoed by An Economic Review of UK Independent Film – a BFI commissioned report).[64]

Although Figure 1 refers only to independent films and does not account for TV or features supported by major companies, a clear decline sets in at 2015 and, in the long-term view, serves to evidence a trend-bucking spike in 2013 and 2014.

Specific to Stoke on Trent, the lag-time between production and distribution of some major successes like *Jawbone*, *The Girl With All The Gifts* (2016), and the Oscar-winning short *The Silent Child* (2017), was coupled with *The Great Pottery Throwdown* beginning in 2015 and a local fervour from the Capital of Culture and Channel 4 relocation bids, to create a sense of cultural propulsion within the city-region. However, the large-scale investment in the cultural economy of the city-region from these broad initiatives were, according to our accounts, propping up the features sector of the screen industries at this time. When these two large bids failed, then a swift decline in cultural fervour was tangible across many sectors, and is demonstrated by the relative lack of content production in the features sector over the last five years (notwithstanding the pandemic).

The relative success though of the period from 2009-2015, should be recognised for its diverse approach to engaging local and national stakeholders. Managing an EU Funded Creative Development programme 'Factory' (circa £2m), Mr Wootton and his team initiated a number of vehicles to engage local industry, highlight the viability of the local area and talent, and bring the uniqueness of Stoke-on-Trent's architecture and history to the attention of large production companies and producers. These initiatives included support screenings from film premieres and the Stoke Your Fires (SYF) Film Festival to community based "Secret Cinema" initiatives, as well as physically touring producers around the city's distinctive venues, and compiling the catalogue of architectural images that remains to this day on the Filming England website. This range of credible activities clearly led to the development and professionalisation of screen-industry support from the local authority within the city-region. The momentum of these events, alongside the recent production of Jawbone being filmed in Stoke-on-Trent's Spode Works, led to the city hosting Creative England's first #BeMoreCreative conference outside of London in March 2018, entitled Be More Stoke.[65]

The range of duties being undertaken by the Creative Industries team within Stoke-on-Trent City Council was not, as Creative England mandate of their Film Offices, solely focused on the support and development of productions in the latter period of the SFO's most active period. A "perfect storm" of decreasing activity and the collapse of the CoC and C4 bids negatively impacted various areas of the cultural ecology, and the screen sector, which was likely to already be in some form of decline, was no less affected. While the continued presence and success of The Great Pottery Throwdown is welcome and important to maintaining Stoke-on-Trent within the national media consciousness, it is no panacea to

> [The activity of Stoke Film Office went] far beyond the remit of simply issuing permits and answering queries from production companies - it was [...] building business and film-focused networks.

this decline. The task going forward then, is what can be learned and drawn from this history.

A range of materials from the SFO should be available within the archives and data stores of the local authority, including image surveys of production locations, marketing materials, previous permit costings, contracts, agreements with suppliers, and records of initiatives that were started. This data has a vital part to play in informing any future support and re-energising the marketing of North Staffordshire as a viable film location. Indeed, as Mr Wootton commented in terms of the successes during his time with SFO, it was "not about income, but about partnership development", be that with property managers, production companies, or local creatives. It was establishing and enhancing partnerships in the 2010s that led to the period of most success in local screen content production, and as much learning as possible should be drawn from that period in an attempt to re-establish that success. However, considering the progress that has been lost, which took almost a decade to grow, the question must be asked if there is a specific focus or sub-sector that can be targeted to swiftly deliver growth for the local industry? Or is there a unique selling point that can promote growth and the specificity of the Stoke-on-Trent city-region? In either case, it is unlikely that a level of funding mirroring the previous European Regional Development Fund will readily be available to compensate for the progress lost at the end of the 2010s and so an exact replica of that previous model cannot be instigated.

Takeaway

While the Facebook page offers only a glimpse of its activities, the SFO was going far beyond the remit of simply issuing permits and answering queries from production companies - it was advocating and building business and film-focused networks across communities, much as the 2009 report recommended. While this progress has since been lost, some consideration must be given to reigniting a version of the SFO and protecting the asset that a thriving Stoke Film Office could develop into, particularly because in the vacuum since its abandonment local individuals have taken it upon themselves to tentatively re-establish a Film Office in Stoke. However, consideration must also be given to how the media production and engagement landscape has changed in the last decade and to important local developments such as the Silicon Stoke project in order to define a USP that can single out North Staffordshire from neighbouring metropolitan hubs.

Platform

Following on from his 2009 report, in 2016 Peter Rudge established Platform, which was the Moving Image Cluster for Stoke-on-Trent and Staffordshire.[66] The cluster's focus is 'on the core areas of Film, TV, Animation and Games' and through 'an innovative support and advocacy structure' Platform aims to 'advance the whole of the Moving Image economy' within the region.
Establishingan executive board that spans industry, education, local government and national bodies, Platform has over-seen a range of activities including gathering a range of industry partners to help promote opportunities and advocacy for the region, as well as overseeing city-region visits by the Creative Industries Council sub-group on Regions and Clusters, helping orchestrate feature film premieres in the area, and commissioning an external report on the impact of its activities.Platform demonstrates that there is already a nascent recognition of the convergence between screen industries with gaming and immersive technologies in Stoke-on-Trent. The opportunity presented by Silicon Stoke's digital infrastructure necessitates building upon this if the distinguishing quality of the region's high-speed connectivity is to be maximised. A combination of long-term strategic goals alongside short-term swift actions needs pursuing simultaneously if Stoke-on-Trent is to optimise its position as a digitally interconnected city. The newly proposed Video Game Cluster, as part of a Video Games Enter-prise Zone,[67] and *Press Start*, a recently completed report by TIGA for Stoke-on-Trent City Council suggest similar courses of action. [68]

Takeaway

Post the 2009 report, the progress made within the local industry was impressive. However, this progress has been lost due to the stretching of human and financial resources leading to reduced proactive support for production and engagement. This occurred against a backdrop of reduced activity in some screen industries on a national scale.
Although this report seeks to re-evaluate industry development at both a local and national level, particularly focusing on trends for developing content production, the usable data from the 2009 report would have vitally enabled patterns to be observed between then and now. Therefore, regular appraisals of the local industry should be a fundamental consideration going forward. Not only can the local authority learn more about activity in its region, but this can also strengthen partnerships with local organisations.
Going forward, Stoke-on-Trent is well-positioned to capitalise on the digital revolution over the next five years due to the Silicon Stoke infrastructure and the wide-spread recognition of media convergence within the screen industries, but swift and direct action is needed to facilitate this.

Industrial Analysis

> We moved to Birmingham [...] because it's a bigger market so we hope there will be a chance for more local clients. To be honest, we had more clients from the USA than from Stoke in those six or seven years.

Overview

Starting with very little information, a database of active industry stakeholders has been compiled and was utilised to gather quantitative and qualitative data regarding the working patterns, business returns, local authority support, training needs, and aspirations for the local industry.

Analysis

We have gathered and consolidated a database of local companies registered within the industry and surveyed as many of those as possible. Our intention was to offer a voice to the freelance community based within the area, however, it has proved difficult to encourage freelance individuals to participate. We suspect that this is for the following reasons:

- As noted in the 2009 report, there is a perceived lack of benefits to them personally and a risk that sharing information with potential competitors might jeopardise their ability to secure regular future employment.

- Many of the organisation surveyed did not have contact information online, suggesting they are still working within employment patterns that are governed by "who you know" rather than showcasing their ability and projects on a website – this meant that contacting many organisations was not possible.

The number of active film, TV and other screen content producers within Staffordshire is relatively small and even smaller when focused on the Stoke-on-Trent city-region. While feature films and television play a part, the bulk of business is driven by commercial and corporate work in producing advertisements and training videos. However, there is a strong sense from the industry of Stoke-on-Trent's viability as an area for film and HETV production and that this could be realised if a Film Office was implemented. There is also a clear recognition of the value of digital production skills in the future of the industry and the necessary role that regular as well as university training must play in supporting this important area for the future of content production.

Approach to Data Analysis

Our statistical starting point incorporated the entire Staffordshire area because there would inevitably be shared benefits from any investment in North Staffordshire for South Staffordshire, as there would be vice versa. Similarly, obstacles and opportunities were likely to be echoed across the county, as opposed to shared by similar organisations in the nearby metropolitan hubs of Manchester, Birmingham, and Liverpool. Therefore, we identified several Standard Industrial Specification (SIC) codes for this survey and filtered the relevant data from the appropriate organisations with an "ST" postcode. Our chosen SIC codes focused specifically on the 'production', 'recording', 'distribution', and 'activities' of 'video', 'television' or 'motion picture' production and post-production, as well as attending to media convergence by including games 'development', 'distribution', and other digital related 'activities'. This SIC code-based data was then added to with related businesses that are part of an economic multiplier effect on the local area, such as equipment hire services and caterers.

Takeaway

As the first attempt in thirteen years at developing centralised statistical knowledge and understanding about the local industry, there is much regular updating and improving of this data capturing exercise that can be done. This should be undertaken by the local authority at regular intervals.

Participation and Results of Consultation

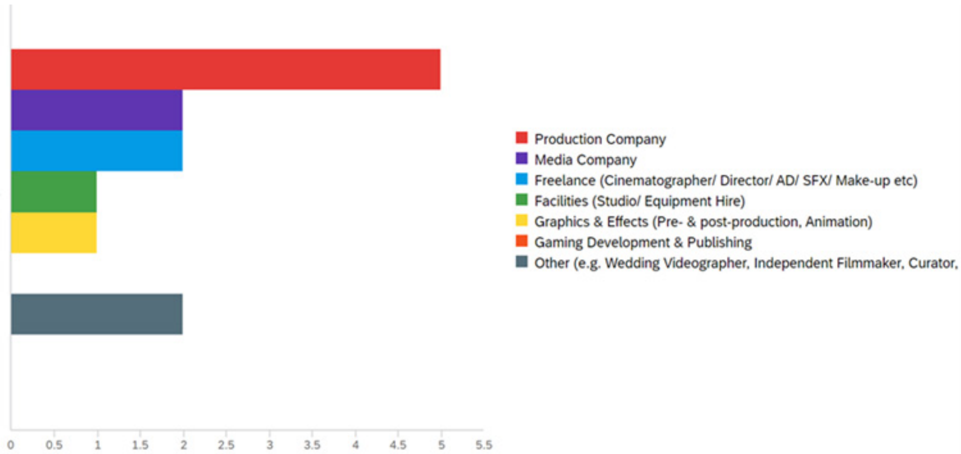
In numerical terms, our initial SIC search yielded over 400 potential organisations and companies within the relevant industrial codes in film, TV and screen content production. After evaluating and cleansing this data, we were left with 140 potentially active organisations. Of those 140, only 44 had an online presence that offered an email contact address. Other routes were employed to contact organisations that had not made an email address available but were largely unsuccessful.

The first finding in relation to this statistical data is that the "base-level" of the industry across the Staffordshire region is low. Research with individuals who have been active in the promotion of the screen industries over the past decade suggest that even the figure of 44 is inflated and that it is likely some of those organisations are relatively inactive or ancillary operations to other businesses. It has been anecdotally suggested that 30 would be the maximum number of companies active in and around the North Staffordshire region.

At the writing of this report, our survey software (Qualtrics) states that of the 44 organisations invited to be part of this consultation 13 invitation emails remain unopened. This correlates with the suggested figure that locally there are about 30 proactive members of the film, TV and screen content production industry. If we take the accurate figure of 31 organisations who are an active part of the sector, we can conclude that 39% of the industry have fully completed their questionnaire prior to the deadline for this research. Added to this, we have 6 organisations who have partially completed the questionnaire, taking us to 18 organisations, or 58% or the active local industry participating at some level with consultation. This second figure, particularly, shows an encouraging level of proactive engagement with attempts to understand the sector and propose ways for the local industries to grow content production. The Qualtrics website supports this by stating that typical participation levels are between 20% and 30%, while 'a good survey response rate is anything above 50%'.[69]

Takeaway

The performance of this consultation is above typical expectations and should be considered a success. We can conclude that the majority of the active industry stakeholders in the Staffordshire region are highly engaged with initiatives to improve the sector, its opportunities for growth, and their engagement with the future of their respective sectors. Such initiatives are also clearly valued by the industry, as key local stakeholders have developed strong associations with other organisations, such as Inspired Films support to Staffordshire University students' producing new content, and Daniel Waterman's (Carse and Waterman) engagement with new routes into the industry for Staffordshire University students as well as younger students as well.[70]



Variety of Business

Overview

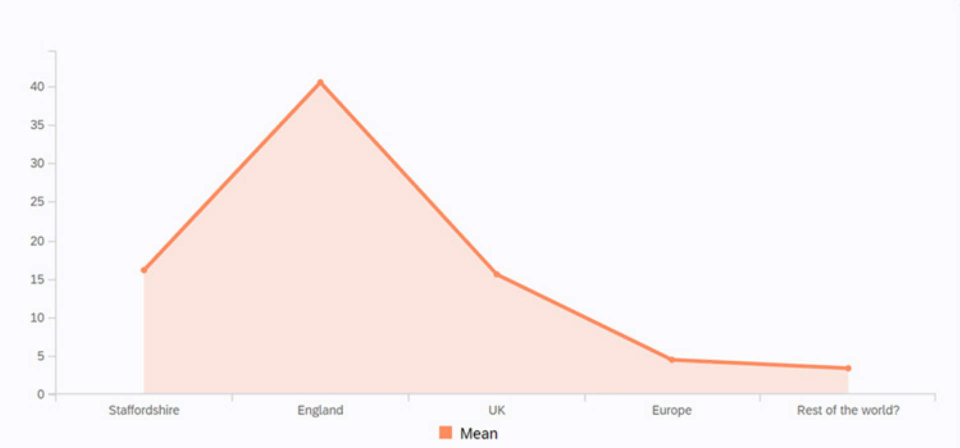
Beyond its rate of industry engagement, another success of this consultation is the cross-section of business activities represented and how this demonstrates a vibrancy within the local industry.

Many organisations identified themselves simply as production companies. Future consultations need to gather a detailed breakdown of business activity in this category. That is, what proportion are feature films, short films, or television productions, and what percentage is business to business (B2B) activity, through training videos, social media content, and marketing materials. There is no "second-class" status between these two kinds of content produced but identifying the balance between these types of activity can inform future initiatives and projected requirements. For example, permits to manage traffic and residents are more likely to be required for feature film and HETV production than B2B content, but the availability of different equipment or specialised skills in set-dressing and lighting might be needed quickly in relation to B2B and marketing activity.

It is notable that no organisation that expressly identifies themselves as a Gaming Developer completed their survey in full, but this does not preclude an overlapping of the skills from that sector into the traditional film and television sector. Indeed, the overlapping of skills with other industries has also been recently identified by games industry experts as the viable and sustainable future for its graduates and new entrants.[71] Added to the variety of the business activities that have participated in this survey, we have also successfully captured data that demonstrates the diversity of companies operating in the region.

- **Company age** ranges from those incorporated in 2022 to those established in the late 1990s, with an equal spread across the first two decades of the 2000s.
- **Primarily clientele** of the surveyed organisations spans the entire gamut from 'individuals' and 'medium to large businesses' to 'large charity organisations', 'all major broadcasters and independent production companies' as well as 'public bodies'.
- **Turnover** measured annually for the most recent full year begins at £40,000 with the highest response registering £250,000. The average is just over £100,000.

Areas of Activity



To balance out the peaks and toughs from companies that had all or none of their business activities in certain geographic areas, and give a closer to average representation, the graph above highlights the spread of business activity geographically across the survey participants. This information was asked for as an estimated percentage and due to using a mean calculation, the percentages will not equate to a combined 100%. Alongside the international reach of some companies, which is impres-sive and highlights the value of excellent digital connectivity facilitated by the Silicon Stoke infrastructure, the business in other UK nations (beyond England) mirrored the level of local activity. It is within England that we see the biggest spike. As a relational representation we can conclude that on average, more than double the business activity of participants occurs beyond the Staffordshire borders. The primary areas of activity beyond the Staffordshire Borders are no surprise: they are London, Birmingham, and Manchester, with a faint registering in the results of Media City, Salford. Although often equated with Manchester, or having Manchester used as a shorthand for it,Salford is a separate local authority and, importantly, have given express and repeatedly-positive affirmations of their ability and willingness to support and prioritise the needs of the film and HETV industries when shooting on location. Discussions with industry experts have made clear that such open and proactive marketing of the area as a "film-friendly" location is a clear expression to the industry of the continued marketability of Salford within the sector – albeit, the new infrastructure, studios, and build spaces of the Media City campus are also a major draw.

Takeaway

The ability of Staffordshire companies to export their skills and expertise around the different regions of the UK demonstrates their high-quality work. However, a desire to increase local activity and draw more businesses and clients into North Staffordshire was repeatedly expressed in our consultation. This desire to grow the screen industries locally from companies already successful outside of the area is encouraging and should be supported fully.

Employment, Training and Digital Upskilling

> **The training has to be something that is separate from your typical Three Year University BA/BSC.**

Overview

A varied landscape of employment exists, from freelance and short-term contractors to sole-traders, and fully-fledged organisations employing multiple permanent staff members. While this variety of employment conditions is likely to persist, training to develop, support, and upskill the different kinds of workers within the screen industries is something the local authority should keenly support.

Analysis

One third of the respondents do not employ anyone directly or via freelance or short-term contract arrangements. These, presumably, are sole trader companies who can supply and fulfil their contracts entirely by themselves. This gives an indicative snapshot of the presence of these smaller organisations within the wider sector. Within the other eight respondents who directly employ or contract labour, two overwhelmingly employ freelance contractors to complete their projects, one is a 50/50 split between directly employed and freelance labour, and one employs freelance labour infrequently to support the delivery of their service. That leaves four organisations who have a majority (80-100%) of directly employed staff members.

If we take this as an indication of the regional industry activity, while cautioning that at times of intense production freelance labour would no doubt increase, it appears that the distribution of labour is in recognisable thirds – one third sole traders delivering their services independently, one third production companies with the financial security and business pipeline to directly employ staff, and one third in the middle-ground, running at varying levels of freelance reliance in order to fulfil their projects.

As noted already, we cannot be certain of the influence that Covid-19 had or continues to have on the industry. Likewise, our data does not shed light on the demographic distribution of who is working in the industry, at what level, and from what backgrounds (in terms of class, education, ethnicity, language, disability etc). Such questions would be the work of future research. However, our research has highlighted several factors that industry representatives believe are important for the sustained and successful development of talent within the industry.

The digital infrastructure installed as part of the Silicon Stoke project is recognised as an important, forward-thinking initiative that will help all screen industries from film, HETV, and game-related sectors. As one respondent stated, 'as a film maker we typically deal with large files so faster connections are always a good thing for data transfer'. In relation to the advancements in both software and hardware that this connectivity can support, it was described as 'extremely' important to secure continued professional development and training locally within the sector. From one respondent who described themselves as a 'hardware operator' to another describing technology as 'the base of everything we do', the need to develop the right skills is recognised as a 'crucial' and perennial issue within the local industry, with a specific focus on two areas voiced: the first is 'industry-relevant short courses' to continually supplment the traditional university pathways; the second is investment in entrepreneurial 'education' specific to 'the right way to employ people'. This facet has implicit correlations with other elements of the day-to-day operations of an organisation, suchas leadership, marketing, finances, and human resources.

Takeaway

The local industry wants to see a range of support delivered, including infrastructure, equipment, centralisation of production facilitation and industry networking, and support for content development, all of which will increase the pull-factors attracting new business to the city-region.

Appraisal of Barriers to Growth and Support Required by Industry Stakeholders

Overview

The digital infrastructure implemented through the Silicon Stoke initiative has been welcomed by the local industry as a vital foundation upon which to build business and to upskill employees. However, a centralised body or hub of industry support has also had a highly vocal presence within our consultation.

Analysis

Of the twelve respondents to the survey, seven specifically answered the question regarding the establishing of a Film Office in North Staffordshire. All seven stated that they thought North Staffordshire would benefit from a Film Office; the other 5 survey respondents did not answer in the negative but rather abstained from answering. It is possible that these five respondents, or a portion of them, are unsure of the role and potential opportunities that a Film Office could offer - this rationale is supported by the fact that three respondents noted that they had 'No' experience of working with a Film Office. With no respondent answering negatively towards the potential benefits of a Film Office, we can state that the industry response to this idea is positive where there is familiarity with Film Offices; those benefits include attracting 'work from larger clients' and 'supporting location searching for live-action productions'.

The topic of a Film Office ignited a passion in the respondents with all commenters suggesting that it would 'bring more work to the area' by promoting 'more high-end film production projects', which would be help demonstrate the 'many amazing backdrop' within the city-region. From small to medium-sized production companies, 'they would all benefit from a centralized and dedicated Film Office' that could enable companies to 'gain access to areas for filming and to support arrangements for production work'. It would also be 'a shoulder to lean on' that could support new entrants into the industry and an avenue to pinpoint training and development opportunities or network and connect between organisations. In short, the local industry perceives that a Film Office would 'bring everything under one roof'.Barriers to growth highlighted in our consultation include a deficit of 'good quality content creators' and a lack of 'production freelancers' in the area as well as a dearth of 'creative and collaborative working spaces' with access to 'facilities such as studios for filming' that might make attracting new business 'affordable for smaller freelancers' and sole traders. While a Film Office is suggested as the antidote to these issues, it would more readily accomplish the networking of freelancers for production work than the development of 'content creators', which is a longer-term task to accomplish and has been noted in relation to the decentralisation of media production by national stakeholders such as the BBC.

A cursory overview of successes that are intrinsically tied to local geographies highlights flagship examples that foreground the physical and cultural specificities of their respective areas: from *Peaky Blinders* recently in Birmingham, to the historic successes of *Bread* (1986 - 1991) in Liverpool, and *Queer as Folk* (1999 - 2000) in Manchester. Similarly, in feature film terms, the East Midlands benefitted greatly from Shane Meadows' *Dead Mans Shoes* (2004) and the *This Is England* (2006) film and subsequent TV series (2010). These examples are a blend of critical and commercial successes both nationally and internationally, but the only "formula" that links them is that they tell stories from and about a specific area and the lives of people in that area. As highlighted in BBC Three's Northern Voices initiative, development of content based within a locality is a vital avenue to support a local screen industry, as tying content production to an area can be a both a financial and cultural boon. Indeed, one respondent highlighted this point specifically when noting that 'the more productions [that] shoot locally, the more potential work there is to be commissioned locally for companies like us, and it[']s another small change to the narrative of the city to being a thriving digital city'.

Conclusion

There is a small core of active, passionate, engaged, and ambitious companies and organisations that supports a relatively vibrant and diverse level of activity in the North Staffordshire screen industries. Currently, much talent migrates away due the level of activity elsewhere, even though the reach of the region's organisations is broad. This means that training and upskilling those who remain is vital for local companies in terms of generating new business and creating cutting-edge content. The barriers to growth and areas for development are represented by a range of supportive measures that the local industry feel would benefit their businesses and the level of creativity and content production in the area. Some well-established organisations want support to upskill their employees, increase funding into their companies to support prodution, and through these measures drive the reputation of the area to support high-quality content production. Smaller organisations want infrastructure support with access to equipment and studio space, as well as support in managing business and marketing pressures. All organisations would like to have a clear, concise, dependable, and swift avenue to resolve all location filming requests and issues, as well as an outwardly mobile representative or representative body for the local area that can promote the unique selling points of North Staffordshire and increase the levels of business interest, client engagement, and content production.

Looking Forward

Upping the quality of content produced mean[s] we all up our game to drive creativity.

The identified high growth areas from our consultation focus on digital production skills in real-time production, VFX, and editing, as well as opportunities arising from media convergence and interactive entertainment systems. Therefore, the need to stay current with technological advances is a pressure for organisations and they would like more direct funding and support in accessing ongoing technical training. Added to this, start-up funding for productions, organisational development, studio space, and access to equipment are also paramount concerns at a local level, while advocacy for tax relief is also highlighted as a vital component that could help grow a number of local organisations, particularly in relation to a lack of international competitiveness within the animation sector, which impacts a number of high-profile companies are based across Staffordshire including Carse and Waterman and Tentacle.

Grow the Screen Industries. Build an Audience. Invest in Talent. Invest in the Future.

Cultural Investment

Overview

Cultural investment offers a myriad of benefits to societies and nations, and in times of crisis cultural investment can have its most pressing and measurable impacts.

Analysis

The value of cultural investment has a long history and importance. The 1948 Universal Declaration of Human Rights (UDHR) states that ‘everyone has the right to freely participate in the cultural life of the community, [and] to enjoy the arts and to share in scientific advancement and its benefits’.[72] The recent global shock of the Covid-19 pandemic was ‘a powerful reminder’ of how ‘people reach for culture in times of crisis, as well of those of joy and celebration’.[73] 2023 marks the 75th anniversary of council spending on the arts, and the independent Commission on Culture and Local Government, established by the Local Government Authority’s cross-party Culture, Tourism and Sport Board, have recently published a report designed to evaluate and plan for the next 75 years and to ‘celebrate the role councils play in binding together culture, communities and place’.[74] *Cornerstones of Culture* (2022) highlights that much has changed across 2022 – from the war in Ukraine, to inflationary rises from below two percent to over ten percent, and associated increases in food and energy prices. The report highlights ‘an expected in-year deficit in council budgets of around £2.4 billion’, and that ‘difficult choices about what and how we deliver in the future’ are swiftly approaching.[75] However, *Cornerstones of Culture* was commissioned to work across cultural fields and test a range of benefits to the social, civic, health, and economic fabric of regional localities. The report makes the case that, tempting though it may seem to reduce cultural spending in difficult times, ‘culture, heritage and creativity’ help to:

- Build resilient, adaptive, networked communities in place, supporting civic pride and revitalizing town centres.
- Promote local economic growth, supporting levelling up through the development of creative clusters, an experiential offer on high streets and providing a foundation for the wider visitor and night-time economies.
- Develop creative thinking, build cultural capital, and provide local economies with high quality jobs that are resistant to automation.
- Support better health and wellbeing, particularly addressing challenges of loneliness, isolation and mental ill health arising from the pandemic.[76]

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A strong local cultural offer improves quality of life and supports the health and wellbeing of communities, it enhances learning, builds cultural capital and opens up opportunities.[77]

Cornerstones of Culture prioritises a strategic approach that builds upon similar investigative analyses like Darren Henley's concept of "the arts dividend". Shaped by his first year as Chief Executive of Arts Council England travelling England and engaging with cultural organisations, Henley published *The Arts Dividend* in 2016, and a second edition in 2020 - The Arts Dividend Revisited - to reaffirm his case in light of the Covid-19 pandemic. Here, Covid-19, the cost-of-living crisis, global geopolitical turbulence, and supply-chain difficulties forcing up prices of many goods and services are not glossed-over, but rather are the vital context within which cultural investment can have its most pressing and measurable impacts. Cultural benefits are not vaguely framed through the simplistic notion that "culture is good for you" – an idea scrutinised by Brook, O'Brien, and Taylor (2020) – but rather these impacts can be measured across a myriad of social, civic, economic, and personal health benefits that contribute to individual growth and to the identity and successful development of place.[78] As Henley writes, reflecting on *Let's Create*,[79] a ten-year strategy proposal for creativity and culture in England from 2020 to 2030, 'a sustained, strategic approach to cultural investment pays big dividends in all of our lives'.[80] For Henley, there are seven _dividends for which he offers brief overviews – below

The Creativity Dividend: 'Creativity changes a place and the people who live there for the better. When people are creative, they are more inventive, imaginative and innovative. They [...] see and do things in new ways that remake the world around them.'[81]

The Learning Dividend: 'Investment in cultural education will deliver long-term dividends to the UK's talent pipeline. [...] The benefits are wide ranging, developing [...] knowledge, understanding and skills.'[82]

The Feel-good Dividend: 'Scientific evidence shows that taking part in cultural activities can improve health and wellbeing. Participating in arts and culture can make us feel happier, and can offer clear medical benefits in the treatment of a range of conditions.'[83]

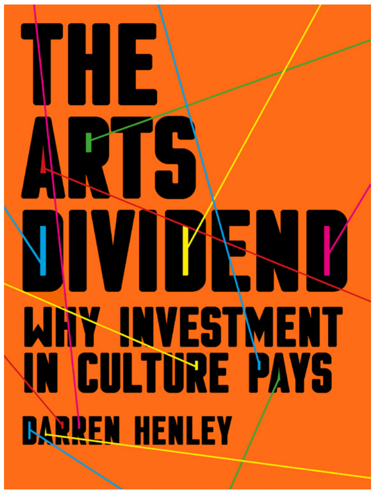
The Innovation Dividend: 'Technology enables us to create, distribute and market cultural products and services in new and exciting ways [...] Public investment in this area helps to ensure that our artists [and creative industry employees ...] are trained in the skills to make the most of it.'[84]

The Place-shaping Dividend: Arts organisations 'have the power to regenerate, define and animate villages, towns and cities. [...] Some of this country's most notable regeneration programmes have culture at their heart.' Alongside the importance of local authority investment in arts and culture, 'increasingly, universities are major investors in arts and culture in their local areas'.[85]

The Enterprise Dividend: 'Investment in arts and culture pays out economic benefits, including creating jobs and driving commercial success in related industries. [...] Our creative industries are renowned on the international stage and this pre-eminence relies on continued investment to enable the UK to carry on innovating and exploiting its intellectual property to its full potential.'[86]

The Reputation Dividend: 'Towns and cities that enjoy creative and economic success can point to the presence of cultural infrastructure and artistic output as a significant part of their success story. These places have also developed a narrative that shows the importance of art and culture in building their reputations.'[87]

The notion of a dividend is important because the structure of arts funding in England is, sometimes, misconstrued. Henley notes that art and culture in Britain is 'funded by a network of public and private investment, including local government, central government, the National Lottery, higher education institutions, philanthropists, business sponsors, charitable foundations and ticket-, book- or artwork-purchasing public'.[88] The vital aspect to understand, as Henley stresses, is that 'these funders do not "subsidise" the arts'.[89] It is never a 'one-sided transaction' according to Henley, 'there is always a return'. That 'return' or dividend can be 'in terms of artistic experience, or the support of creativity and talent. Or there may be a clear economic payback, the promotion of acompany's commercial interests, or an interest in supporting the life of a community'.[90]



Takeaway

Henley's dividends highlight how growing and developing an expanded screen industries sector can benefit North Staffordshire. A diverse range of multiplier effects, or cultural dividends, from investment in the creative industries can cascade through local communities, business, educational institutions, localities and related organisations. Cumulatively, this can also consolidate Stoke-on-Trent's reputational balancing-act between being a centre for artistic innovation based on an industrial past and an epicentre primed to maximise the opportunities of digitally driven economies, as highlighted by the national Levelling Up agenda and Stoke-on-Trent's 'Powering Up' prospectus.[91]

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Supporting Content Production and Screen Industries

Overview

Local industry states that a Film Office would benefit North Staffordshire. However, industry bodies, such as Creative England, question the current viability of a Film Office in this area, suggesting that existing production levels don't necessitate the implementation of a Film Office, and that the area would struggle with the studio space and the crewing requirements of larger productions. How do we satisfy both positions and ensure that local industry is supported while growing production to levels recognised by Creative England as warranting a Film Office? To answer this, we need to rethink the remit and role of a "Film Office".

What is the Role of a Film Office?

It is the role of a Film Office to provide a link between the local authority and industrial stakeholders concerned with content production. According to Film Offices: UK (FO:UK), the remit is to 'provide a single point of contact with industry knowledge' and to build 'a network within and between the authority and the local area', managing incoming inquiries and proactively promoting a vibrant, viable, and accessible community for production and the development of talent.[92]

Duties can include authorising permissions to film, close streets and manage traffic, liaise with stakeholders and residents, gather data to help increase activity in the local area, manage and maintain location lists, set location fees, increase awareness of the region as a film-friendly location, and manage operational issues in response to location challenges. In short, being both an operational coordinator in the support of productions as well as an advocate for the viability of projects being fulfilled within a locality.

Most UK Film Offices, after establishment through Creative England, tend to gain membership of FO:UK. This network was established in 2013 as a forum through which independent Film Offices can share information, advocacy efforts, and best practice. The twenty current members consist of: Bath; Bradford; Bristol; Cardiff; Birmingham; Edinburgh; New Forest; Torbay; Isle of Wight; Glasgow; Kent; Liverpool; the North East; North Somerset; Cornwall; Manchester; Yorkshire; Surrey; Fife and Tayside; and Thurrock.[93] Importantly, in terms of implementation, a Film Office under the FO:UK banner is 'a not-for-profit service wholly or partly funded by local and/or combined authorities with a dedicated member of staff resourced to support film and TV production of all types proactively and reactively without prejudice'.[94] These various Film Offices, even seemingly larger ventures like Manchester's Film Office, require relatively little office space and have a small team of dedicated, knowledgeable, and supportive advocates for film within their locality. Some, like Film Bradford, also take advantage of hubs for creativity and training by being based within a local University.

Minimum Requirements

Before membership of the FO:UK can be certified, Creative England must be satisfied in the establishment of a Film Office through their protocols – this requires one full time employee or several employees fulfilling a full-time equivalent role (FTE). The sole purpose of this role, so Creative England guidelines suggests, is to be responsible for the operation of the Film Office and it would be inappropriate for the employee(s) to be concerned with events, communications, or anything that is not fully focused on supporting and developing production. An estimated expenditure on that FTE role should be in the region of £25K.

The obvious difficulties in establishing such a role within North Staffordshire are clear:

- If the city-region does not currently have the level of production to support the full-time employee in the administration and operational oversight of filming and production, then the monies invested in the role are not being efficiently spent over the short-term.

- Furthermore, if the limitations of their duties prohibit them from engaging in the diverse ways required to build a broad and inclusive screen industry sector within North Staffordshire, then sub-sector areas of development will continue to be marginalised, and potential growth areas will not be supported.

If the full potential of the Silicon Stoke project, Powering Up Stoke initiative, and the Video Game Enterprise zone initiatives are to be maximised, then any forward-thinking Film Office in North Staffordshire must look to support the diverse range of digital content production that exists within the North Staffordshire portfolio.

Takeaway

A Film Office would be welcomed by local industry and offer support for regional production. However, structural issues and currrent activity levels suggest a somewhat hampered start should be expected for such an initiative if following typical Film Office guidelines. While this may be a justifiable medium-term aspiration, there are opportunities to establish a unique style of structure that could also support and develop extant industry as well as elements of North Staffordshire's screen industries that operate outside of traditional film and TV projects.

Establishing a Viable Film Office

Overview

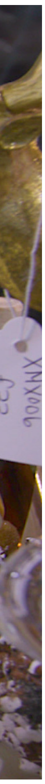
Typically, Film Offices have been established (or morphed into existence) in response to the needs of industry within a local area.

Analysis

Through consultation, we have concluded that it is very difficult to drive demand in a way that quickly legitimises a newly established Film Office – such ventures have historically been justified almost before it has been formally established. Therein, if a Film Office were to be established in Stoke-on-Trent, in line with the Creative England parameters outlined above, it should be expected that very little return or activity would begin in the first 12 months. Consultation also suggested that a moderately busy Film Office might be able to attract mid-size drama productions to an area, with *Peaky Blinders* frequently used an example

Such a production would typically employ about 50 people as part of the crew and spend an estimated £16K a day when on location. These levels of return are attractive, and the "trickle -down" effect of such spending would be a major boost for the local economy in terms of hospitality and catering. However, whether Stoke-on-Trent can currently attract that level of production work quickly is uncertain, due in no small part to the numbers of local crew required for this level of activity and a lack of commercially accessible studio infrastructure locally.

A solid infrastructure comprised of a wide-ranging local, experienced crew, combined with studios or build spaces for sound stage and set construction would be an attractive incentive to stimulate growth in the region. However, it is difficult to know whether this infrastructure would entice production outside of the larger metropolitan areas of Birmingham, Manchester and Liverpool. Similarly, in crewing terms, there is no central database of talent, so no way of knowing whether productions of this kind could be staffed by local talent. While these roles could be fulfilled by people from further afield, such as Birmingham or Manchester, this will have consequences for production-budgets in terms of costs for crew travel and labour. In terms of studio space, although there are in-house production facilities, they are limited in size and number. Compounding this, an investigation of potential locations to develop into build spaces would need to be undertaken to ascertain the viability of any such proposed premises.



Takeaway

The challenge then, in light of this learning, is not investigating if it is right to open a Film Office in Stoke-on-Trent but rather answering the question, what kind of Film Office can most appropriately support the local industry in its current state in order to realistically grow production, while also driving forward a long-term strategic direction for the screen industries in North Staffordshire?

Learning From Others

Overview

Differing locations across the country have taken a range of pathways in developing and building their Film Offices and local screen industries. Here we briefly highlight three directions of travel to assess what might be important and productive in plotting a strategic direction for a Film Office-like body in North Staffordshire.

Liverpool

Liverpool Film Office has developed a large influence within the HETV and film production landscape - Lynn Saunders, Head of the Liverpool Film Office claims that 'Liverpool is the second most filmed city in the UK'.[95] The slick operations of Liverpool Film Office present a highly active area in north-west England, bursting with talent and content production. From historic successes based on the location of Merseyside, such as *Bread*, *Boys from the Black Stuff*, and *Brookside*, to modern day success stories such as *Help* and *The Responder*, Liverpool has developed from telling stories about its area to being a prime location for all sorts of productions, from *Peaky Blinders* and *The Crown*, to more recently doubling as Gotham City in the *Batman* film (2022).

In 2019, on the 30th anniversary of Film Office Liverpool, the single most substantial initiative in cementing and growing Liverpool's reputation as a content production hub was unveiled. The Production Fund for films, TV drama, animation and comedy series shooting in the Liverpool city area was announced by the newly appointed fund manager Chris Moll, who previously managed the development and production funds at Creative England.[96] The fund 'will typically invest up to 20% of a production's budget' with a cap of £500,000 per project. The investments 'can be combined with other public and private money as well as with the UK tax credits' to maximise all avenues of support and 'an initial £2 million capital for the fund has been provided by the Liverpool City Region Combined Authority through its Strategic Investment Fund'.[97]

This significant step in ring-fencing investment was building onthe success of the BBCs *War of the Worlds* filming in Liverpool in 2018, as well as following a recent announcementof the redevelopment of the Littlewoods building into purpose-built film and HETV studios. This redevelopment stands adjacent to The Depot - two new purpose-built sound stage build spaces available for hire from 2021. Enhancing this clustering of infrastructure, in December 2022 Supplier2LocationGroup,aprovider of logistics services and location support for UK HETV and film production, has opened a new depot in Liverpool increasing the availability and attractiveness of the area by being able to provide swift access to location services such as equipment and support.

Takeaway

This mix of funding, industry activity, local crew, and physical infrastructure has made Liverpool a thriving centre for film and TV, with Paramount+ recently announcing it will take up a seven-month residency at the flagship new Depot development to film a TV spin-off based on British London gangster film *Sexy Beast* (2000). However, it has taken 30 years and significant investment to grow the industry to this stage.

Bradford

Bradford has a similar profile to Stoke-on-Trent, a tight proximity of urban and rural areas, undergoing a process of post-industrial diversification, neighbouring major metropolitan areas such as Leeds and Sheffield, as well as a strongly aligned history with specific industries (clothing and cloth production). However, in comparison to Liverpool, Bradford has a distinctive marketing strategy.

While the homepage of the Liverpool Film Office website acts as a newsfeed, highlighting the benefits of the area from The Depot to the stream of productions that are in production, airing, or winning awards, the Bradford Film Office homepage draws immediate attention to the range of distinctive locations available within the greater Bradford area. Therefore, while Liverpool focuses on recent successes and studio infrastructure, Bradford's focus is its cultural and film heritage, its local natural landscapes and historic architecture, the diversity of location, and its wider ecology of creativity. This heritage and focus have led to Bradford's successful and permanent establishing as the world's first UNESCO City of Film in 2009 – there are now 13 such cities, including Bristol and Galway within the UK and Ireland. A brief overview of the nexus of creative endeavours related to the Bradford Film Office highlights how this balance between heritage and content production supports the Film Office's endeavours within Bradford but also broadens out its sphere of influence into educational, social, and cultural activities.

The Bradford Film Office is one branch of a four-pronged 'family' within this "UNESCO Creative City", which comprises:

- **Bradford Film Office -**
  The hub for all TV and Film production facilitation and inquiries.

- **Bradford Big Screen -**
  A large city-centre screen designed to 'belong to the people' and provide 'national and local news, sport, arts, culture, entertainment and events', as well as broadcasting 'film, photographs or other content' shared by local residents that 'enlightens, inspires, [and] entertains'.[98]

- **Bradford Film Heritage -**
  A project that 'aims to showcase Bradford's contribution to film and television since the dawn of the moving image in the late 1800s' and to 'expose this exciting aspect of Bradford's past to the public, allowing both residents and visitors to explore an oft-overlooked side to the district's local history'.[99]

- **Bradford Film Literacy**
  A programme designed to 'engage and inspire teachers and their students to use film and moving image to create, develop and enthuse young people's interest in literacy through the medium of film'.[100]

This highly detailed and integrated partnership of cultural and social activities that are centred around the different offerings that film-focused events can support is an example of the multiplier effects and cultural dividends that a broad investment in film-focused activities can support. The Film Heritage project is as much about film tourism as it is about knowledge exchange and the marketing of the area for future productions. Indeed, despite the hosting of the Bradford Film Literacy website falling into inactivity in late 2021, this programme had been active for over seven years and supported a diverse range of projects including a PhD investigation into how the emotions that films can provoke in school-aged children can support the development of their writing skills.[101] Such educational tie-ins are one aspect why the Bradford Film Office is positioned within the University of Bradford. This location aligns with the Screen Yorkshire 'Connected Campus' initiative, which partners with ten Higher Education (HE) institutions across Yorkshire (including the University of Bradford) to forge 'closer links between TV and Film professionals, production companies, broadcasters and the students trying to break into this competitive industry'.[102] In addition to training and knowledge exchange schemes, links to HE institutions also create new opportunities for innovation, creative diversification, and funding streams that can benefit partnerships between civic partners and cultural organisations. This aligns with the suggestions of one company within the Stoke-on-Trent area surveyed by this research, who stated that a movement away from a solely "Film Office" enterprise to a "Creative Office" would help create partnerships across different creative sectors and institutions.

Takeaway

Any Stoke-on-Trent offering to establish a hub for screen content production should follow the Bradford example of engaging broadly in partnerships between different endeavours and creative opportunities, in both traditional and modern technologies, to support content production as well as investing in screen industry diversification, innovation, and community engagement.

Sunderland

Sunderland comes under the umbrella of the North East Screen (NES) regional screen agency - formerly Northern Film and Media – and, as such, shares a dedicated Film Office with other cities and the wider region. Established in 2002, after the UK Film Council's review of film infrastructure led to the initialisation of eleven Regional Screen Agencies (RSA), the NES is what has evolved from that period when the RSA network closed in 2011. As noted, Stoke-on-Trent is part of the Film Hub Midlands (FHM) region, which was formed in the vacuum left by Screen West Midlands. While the FHM is concerned with supporting the exhibiting as well as the making of films in the Midlands, their role is somewhat superseded by a Film Office when larger scale productions are concerned with areas within which a Film Office is established, such as Birmingham.

In November 2022, a proposal to regenerate the 'existing mega-structures' of Sunderland's derelict Pallion Shipyard buildings into 'the largest covered "water studio" in the world' was announced.[103] In a swift process overseen by Sunderland City Council, permission for the change of use was granted in December 2022 meaning that only the permissions for new and remedial construction work are now required before work can commence. Although it will be one of three tanks for filming under water in the UK, it will be the only one in the North East and the development will also accommodate traditional studio spaces, and other venues for performance and art installation. It is estimated that requirements for studio space exceed '2m sq ft more than currently available and rising, thanks to increasing demand from streaming services such as Prime and Amazon constantly needing to keep refreshing their content', and such demands are fuelling developments like Sunderland's Shipyard and Liverpool's Depot.[104] The unique selling point though of Sunderland's project is not only the size of the under-water filming tank that will form part of the studio infrastructure, but also the symbiotic alignment with the North East's coastal geography. The development of local infrastructure that uniquely offers the ability to film in controlled underwater environments has the potential to further cement production in respect of its coastal locations as well as be a draw for international productions that require both coastal and under-water filming opportunities. In short, this project and Sunderland's aim, within the NES agency, is to promote, invest, and develop opportunities around a USP that is not easily replicable by other areas. This global investment project links a North American production company, a British engineering firm, and a Japanese development corporation. It is a project that will run to many millions of pounds in investment and yet follows-Sunderland's failed bid in 2017 to become the 2021 UK City of Culture. This shows that such setbacks are not prohibitive to innovative and ambitious development within regional creative industries, albeit this is a privately financed development but one that has received swift local support. Despite some protestations from locals who suggested a rejuvenation of shipbuilding might be more suitable, Sunderland City Council are supporting the development of a new industrial pathway for the future of the area, its economy, and its population.[105]

Takeaway

Liverpool is an example of long-term investment, incremental infrastructure development, and capitalisation upon increasing success in the capture of production contracts. Bradford demonstrates a civic and social application and integration of the screen industries across a regional area driven by the specificities of that area. Sunderland's focus is on maximising a USP through major infrastructure investment and development.

Summary

It may not necessarily be prudent to pump financial investment into North Staffordshire, or a sector of the screen industry within the region, when established major production centres sit at the region's borders. However, the transferable learning from Sunderland's example is that the defining and surging of support and development behind a USP can offer a way to distinguish a locality from others. Considering those major metropolitan hubs bordering Staffordshire, the logical step forward to secure the future of content production is to establish North Staffordshire distinctiveness within the media landscape.

In North Staffordshire, we suggest that the Silicon Stoke project, its digital and fibre connectivity, and its integration with forms of media convergence including the rapid growth of the gaming technologies sector can be a USP for the wider city-region. This USP does not marginalise the extant and emerging film companies because it offers additional routes to build on, develop, and diversify existing and future expertise in pre- and post-production, VFX, and digital effects.

Work Packages
At a Glance

01
Growing the Screen Industries

Recommendation

- Develop Website and App for Stoke Screen Office (SSO).
- Establish "Stoke Screen Office" (SSO) Steering Group.
- Develop partnerships with regional and national stakeholders.
- Enrol employee(s) on Film Office training initiative with Creative England,
- Introduce a fund that ring-fences all fees for redistribution to support production.

Impact

This short-term package is designed to make swift gains in establishing the mechanisms of support for varied sectors of the screen industries in North Staffordshire. Successful and sustained enactment of this package will begin to shift the reputation of Stoke-on-Trent towards a new digitally connected, film-friendly, cultural hub.

02
Building an Audience

Recommendation

- Establish a Screen Outreach Coordinator to promote participation in screen events.
- Work with Film Hub Midlands to develop a community engagement scheme.
- Secure space and equipment to help grow interest in screen based media.
- Invest in methods to screen based projects across the Six Towns.
- Support national initiatives that highlight the benefits of screen based culture.

Impact

Building an Audience is focused on giving back to the local communities through both leisure, participatory, and health and wellbeing initiatives. To successfully achieve this, a specific Screen Outreach coordinator (SOC)) needs to be established to manage, pro-mote, document, and coordinate public events and industry engagement.

03
Investing In Talent

Recommendation

- Establish a "Training" branch of the Stoke Screen Office (SSO) and its website.
- Contribute to the development of vocational education routes into industry.
- Advocate for a range of vocational as well as traditional education routes into industry.
- Encourage innovative and diverse employment avenues for graduates.
- Consolidate the region's position as a leader in digital media training.

Impact

The region benefits from Staffordshire University's (SU) and Stoke-on-Trent College's recognised excellence in producing highly skilled graduates in traditional screen production practices. There are opportunities to create stronger partnerships between educational institutions, industry, and the local authority that can solidify this highly marketable facet of the region

04
Investing In the Future

Recommendation

- Create a suite of tax incentives that support extant and emerging organisations.
- Work with SU to support digital Start-Ups within the creative industries.
- Support and establish initiatives that foreground media convergence.
- Promote opportunities such as SU's E-Skills & Entrepreneurship Gateway programmes.
- Network with the BFI to establish a satellite "Expanded" screen media festival.

Impact

This final Work Package requires that the local authority be alert and reactive to shifts and opportunities within the landscape of media convergence, while also being proactive in forging ahead with the ambition to make Stoke-on-Trent a hub for digital pre- and post-production skills that link gaming technologies with screen content productions.

Work Packages One and Two: Growing the Screen Industries and building an Audience locally.

Invest in skills and culture

The Role of the Local Authority

The support of the local authority is paramount to the success of growth and development in screen content production and in developing local screen industries. This extends not simply to the formation of a formal support hub like a Film Office body and in the production opportunities that it can attract to an area, but also via a solid commitment to supporting production in tangible ways, particularly around the closure of areas and management of traffic and other risks to productions. Salford is a notable instance of this, where a film "Charter" has cemented the local authority's commitment to industry and is demonstrative of the level and kind of support that will be afforded to production companies wanting to develop content in and around those areas. Stoke-on-Trent council has signed a film friendly charter with Creative England in 2012 but now must actively undertake to promote itself as a location for filming and as a local authority sympathetic to the issues that commonly face production companies in other areas.[106]

The Work Packages that follow set out how this unique framework of support and development will aid the current industry, grow content production, promote a cascading range of multiplier effects and cultural dividends within the local community, and robustly establish a strategic future direction for the region's screen industries and talent development.

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Work Package One:

Growing the Screen Industries

Summary

The growth of the local screen industry can be best supported through a Film Office-like provision. Stoke Screen Office (SSO) will be a central hub for local screen industry activity by facilitating production queries within the city-region, managing an open database of the local work force, promoting the area, and building interest in the distinctiveness of Stoke-on-Trent as a production location and a base for industry. To support the SSO, local authority coordination must build partnerships with surrounding regions and national industry stakeholders, engage with local stakeholders, manage detailed record keeping of industry activity, and undertake to establish a Steering Group that facilitates joined-up thinking between different departments in the council in respect of the screen industries.

These recommendations lay solid foundations for swift actions to support the extant industry and the simultaneous long-term development of a distinctive screen industries narrative in North Staffordshire. Combined, these activities establish the local authority as a highly motivated partner in driving growth of screen industries at the regional level.

Short Terms Focus (0-2 years)

Strategic Aims

- Establish credibility for long term commitment to the sector.
- Develop networks with key local and national stakeholders.
- Highlighting the value of Stoke-on-Trent's different model of industry support that welcomes the industry recognised trend of media convergence.
- Establish a USP distinct from other metropolitan hubs.
- Continue to build knowledge of local industry, to evaluate activity and plan initiatives.

Operational Tasks

- Develop Website and App for SSO - Website to have User Generated Profile pages for Freelancers, database of production locations, database of possible studio spaces, guidance for permits, new location submissions, policies, Film Friendly Charter, etc. As part of this work, review, improve and expand the database of production locations and increase access to this through platforms such as Focus, Filming England, UK Film Locations.
- Establish "Stoke Screen Office" (SSO) Steering Group - Reps from council's Cultural Engagement, Tourism and Marketing, Traffic Management, and other relevant departments, as well as external expertise on consultation basis (industry and education leaders).
- Develop partnerships with both national stakeholders and Staffordshire Council, as fluid boundaries -will promote tourism, ease permit issues, and share growth across the region.
- Develop SSO Staff - Enrol employee(s) on Emerging Film Office Cohort at Creative England, and establish short-term secondment into local production company to support SSO staff understanding of industry-side challenges.
- Initiate "Permits to Produce" Fund – A fund that ring-fences all permit fees and other SSO income for competitive distribution as grants to support local production projects.
- Bi-annual Meeting - the culmination of the first two years should be a conference organised by the local authority for the local industry and other stake holders where key achievements and future planning should be outlined to consult and get support from local industry.

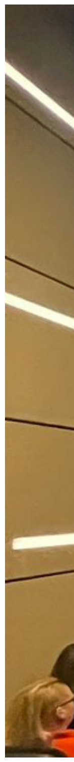
Costings

- Develop Website and App for SSO – estimated costs for this begin at £15-20,000, dependant on certain interface specialisations; for example, increasing capacity and design features to include multiple databases. To produce a database of Production Locations, the original files and information gathered under Marc Wootton's stewardship should be located. If they are deleted, up to £10,000 should be budgeted to survey and itemise the production locations deemed desirable in the city-region.
- Establish SSO Steering Group is a reallocation of current resources enabling dedicated meetings at least once a month to manage tasks and progress.
- Enrolling Employee(s) on Emerging Film Office Cohort, this can be an extant employee(s), meaning a reallocation of current resources is one option, though this should be a long-term reallocation with the expectation that this person, or persons, work proactively to support and generate content production that will necessitate a greater level of their time being devoted to this endeavour. It is likely different terms and conditions may be part of migrating current employees into this new role. The alternative option is a new employee for a full-time or FTE role to be fulfilled. The expectation, as noted, should be that little-to-no new content production would be generated from this role within the first year, and that they may be working heavily on ancillary activities. A new employee role should be advertised at circa £25,000pa, and associated costs for advertising, interviewing, and undertaking relevant checks should be added to this figure.
- Short-term secondment into a local production company would offer much to both the production company, the SSO Steering Group, and the seconded employee(s). The local authority should expect to pay the employees' wages in full as the production company will be offering insight, expertise, and information. This secondment would ideally be split over the production planning, development, and shooting phases of a project
- Initiate "Permits to Produce" Fund - This would benefit from an initial investment at the outset, which we would recommend, for swiftness, comes from the Local Authority to stimulate production in the region.
- Bi-annual Meeting – Up to £4000 should be budgeted for this event, in order that the venue, refreshments, marketing, and data gathering is appropriately secured to maximise the attendance and participation from local industry as well as attracting crucial national stakeholders to participate.

Impacts

This short-term package is designed to make swift gains in establishing the mechanisms of support for varied sectors of the screen industries in North Staffordshire. Successful and sustained enactment of this package can:

- Begin to shift the reputation of Stoke-on-Trent towards a new digitally connected, film-friendly, cultural hub.
- Provide joined-up thinking on a regional basis that will aid coordination with industry. Encourage new content development and production start-up locally.
- Offer routes to increased graduate retention.
- Increase accountability at local authority level as part of a robust engagement with industry.
- Embed standard industry practice in production support at local authority level.
- Foster a connected and sustainable local industry network.



Medium Term Focus (2-5 years)

Planning far into the future in an operational sense is a fruitless task. Therefore, the medium and long-term packages are presented on a sliding scale of reduced operational heft and an increased strategic direction of travel for North Staffordshire over the next decade.

Strategic Aims

- Develop larger funding provision and tax incentives to support content production and Start-up support.
- Secure the position of the region for digital content and production skills through training and development, future proofing the region for when full-fibre connectivity is a ubiquitous.

Operational Aims

- SSO becomes a sustainable venture that requires dedicated staff - the Steering Group should remain to monitor the variation and future directions of screen industry support.

Long-Term Focus (10+ Years)

- Build a reputation for digital content production and visual effects that encourages companies to open and remain in the region.
- Return the levels of production to the height of 2012-2015 where feature length productions were produced and local talent for storytelling was finding avenues for support.
- Establish an infrastructure of locations to support all levels of HETV and film production.

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Work Package Two:
Building an Audience
Summary

Building an Audience is focused on giving back to the local communities through both leisure, participatory, and health and wellbeing initiatives. To successfully achieve this, a specific Screen Outreach Coordinator needs to be established to manage, promote, document, and coordinate public events and industry engagement. This role would build partnership with local stakeholders such as Film Hub Midlands. Building on this, the local authority should invest in equipment to support screenings in diverse locations and studio space to enable diverse community participation projects to be created. Finally, establish a Medicinema hub and pioneer connections with local care homes to demonstrate the well-being benefits of screen cultures in diverse applications.

Short Terms Focus (0-2 years)
Strategic Aims

- Establish a vibrant film audience network in North Staffordshire.
- Increase interest and engagement from local populations with screen content production.
- Highlight the heritage of film across North Staffordshire.

Operational Tasks

- Establish a Screen Outreach Coordinator to promote community interests in screen content production, participation, exhibition, and health and well-being initiatives outlined below.
- Partnerships – Work with Film Hub Midlands to develop a scheme of exhibition and community engagement activities in North Staffordshire. Work with local film festivals (Staffordshire Day Film Festival, The Smokies Festival, restart the Stoke Your Fires Festival) to promote local projects and link with other regional festivals to share successful projects.
- Secure space and equipment to help interested communities gain access to equipment allowing them to experiment with filmmaking at regular intervals – support local organisations such as The Production House by hiring venues and equipment.
- Invest in methods to screen projects across the Six Towns (e.g. semi-permanent or mobile screens) with focus on regional productions, film heritage, and local initiatives. This infrastructure can utilise Staffordshire Film Archive footage specific to each town. [107]
- Support national initiatives that highlight the health and social benefits of screen cultures, such as Medicinema and inaugurate events (Medicinema has links to the area through The Smokies Festival co-ordinator Philip Kempson).[108]
- Expand the social reach of such initiatives by pioneering engagements between care homes/ retirement homes and film screenings, offering ways to stimulate, engage, and support the health and well-being of the older generation.

Costings

- **Establishing a Screen Outreach coordinator** could form part of the same role as the SSO facilitators. The aim, as for the SSO, is that dedicated individual(s) would need to build the level of activities to the point where they needed to focus entirely on that role.. If a new employee is hired, then **the salary of £25,000 is shared across these roles,** until an individual post is justifed.
- **Partnering with local festivals** would require some discretionary funding in support of their activities but, as self-contained projects that are already in operation, this should be limited.
- **Bursaries** are available up to £500 for attendance and participation at film festivals from the FHM for member organisations. Membership is free, so if not already a member **the City Council must join FHM.** [109]
- **Securing Space and Equipment** to support amateur exhibitions, production, and training should be a **discretionary budget** for short-term contracts with local organisations that can offer studio space or equipment hire. Such initiatives could form part of a cultural offering in line with other events, such as film festivals, and be part of those budgets.
- **The BFI's Launchpad** scheme is also open to applications to support local screening initiatives with a **maximum contribution per project of £300.** This is useful as an additional route for community funding and as **a guidance figure for projects funded by the Space and Equipment Discretionary Budget.**[110]
- **Projecting films across the Six Towns** requires a number of large screens or mobile screens – each of which has a list-price hire cost of between £1000-£2000 per day. However, repeat contracts and multiple locations can reduce this price through negotiation, as can sponsorship and advertising. A cost-effective joint venture would be to schedule such installations around a film festival or other cultural event.
- **There is no cost in working with Medicinema** as it is a charity. However, fundraising on their behalf at cultural events would be a way to encourage more participation from the local community, more local interest in the importance of screen cultures, and more positive news stories for the Stoke-on-Trent area.
- **Care homes/ retirement homes and film screenings** offers the additional multiplier effect of linking diverse local companies that can lead to future business. This can form part of the **Securing Space and Equipment Discretionary Budget.**

Impacts

- At the height of the previous Stoke Film Office, a range of diverse and well-attended events focused on screen content across the Six Towns, from festivals to "Secret Cinema" events. Such events can bring together different creative industries, such as musicians for live accompaniment to screenings, or the screening of archival footage highlighting both the ceramics history of the region as well as other creative histories. Council support for such initiatives signals their value as part of the local cultural offering.
- Enabling individuals with little experience to experiment with film-making skills helps diversify the demographics of new entrants into the screen industries. It offers an opportunity for local Further and Higher Education institutions to highlight their courses. And it can also be a route to help content developers experiment with new work and aid submission to initiatives such as BBC Three's Northern Voices.
- You cannot measure in economic terms the work of initiatives such as Medicinema or retirement home engagements, but there is much research that highlights the health and well-being benefits of such schemes. [111]

Medium Term Focus (2-5 years)
Strategic Aims

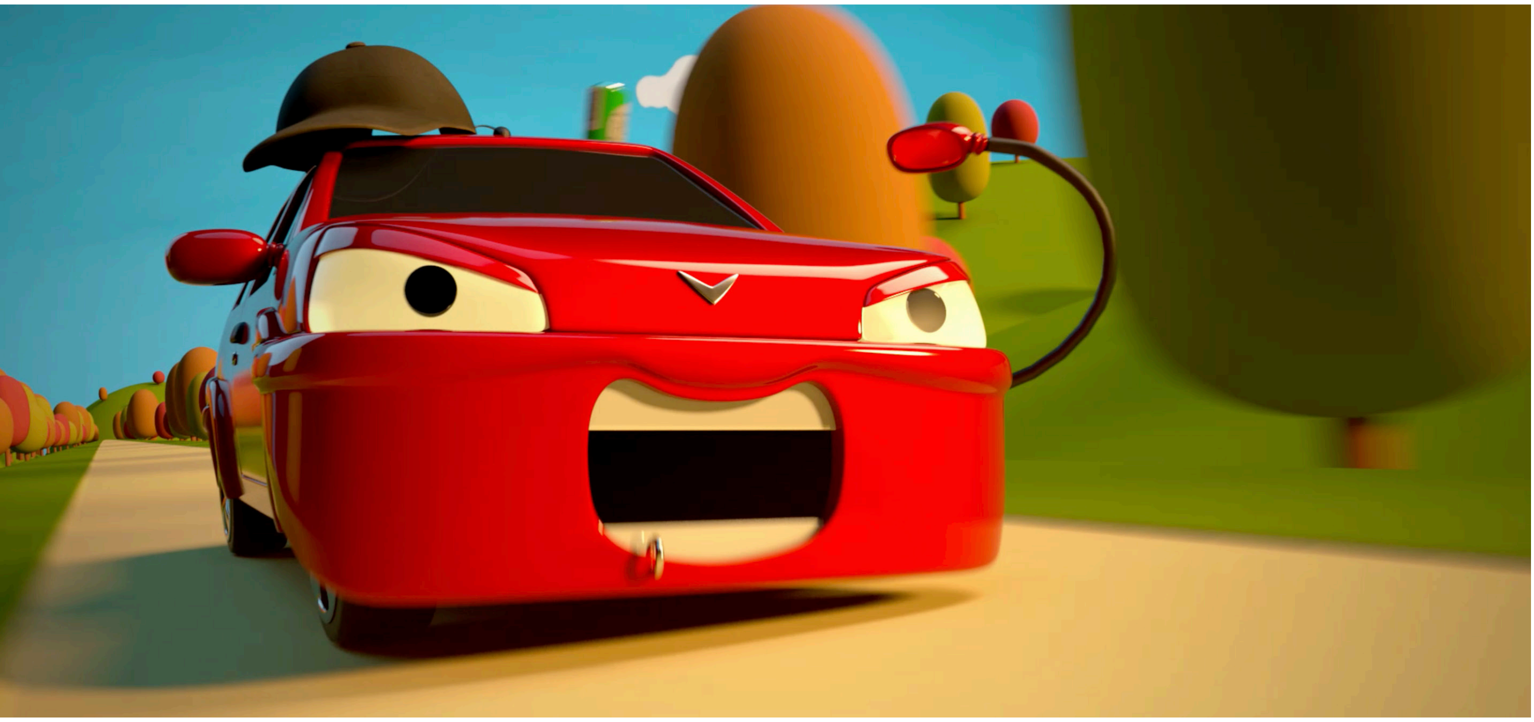
- Establish a calendar of screen culture events.
- Regularly support community projects and networking opportunities for burgeoning creative artists to engage with established practices.
- Publicise the value of health and well-being events utilising film across the region.
- Expand from film-making skills into supporting storytelling and content development.

Operational Aims

- The calendar of screen culture events should be reducing its budgetary requirements from the local authority and maximising sponsorship from local businesses.
- Invest in permanent screen infrastructures across the Six Towns that can diversify into regularly screening sports events, summer cinemas, and other uses, which will increase the regularity of footfall and spending in businesses around those screening locations.
- Diversify screening and exhibition locations to include historic and cultural venues within North Staffordshire (e.g. potteries architecture) and highlight the distinguished locations of the area with both traditional film projection and digitally creative initiatives.

Long Term Focus (10+ Years)

- Establish a local Film Audience Network (not to rival the BFI initiative) but a community-led network, supported by the local authority, that coordinates screenings, exhibitions, and equipment use for community film makers, with links to educational institutions to support people who want to develop their skills and knowledge.
- Initiate a "Feeder-Fund" from professional activity to support and drive more community events and health and well-being initiatives.



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Work Packages Three and Four: Investing in Talent and Investing in the Future

> Industry-relevant short courses are needed but nothing is available locally.

> Technology is at the base of everything we do so constant learning is always a part of the job.

Overview

The national context shows a positive return of audiences and business across the screen industries. However, in a local context, Stoke-on-Trent has the potential to attract new business and retain its talent but requires concerted effort in training and business support to secure this vital step in the retention of skills and the sustainable development of local screen industries, particularly in emerging sectors of media convergence.

Industrial Context

The film industry is experiencing a robust bounce-back in cinema-attendance since the pandemic. This confidence will continue to spur investment in the film industry to complement the increased levels of content being produced for high-end television (HETV) due to the growth in SVOD. Economic projections suggest that the increase in film and HETV in the UK alone, up to and including 2025, could attract between £1.43bn and £2.02bn in production spending. These projections mean that an additional 15,130 to 20,770 full-time equivalents (FTEs) of additional crew personnel are required by 2025, over and above the existing workforce nationally, which is estimated to be 52,300 FTEs in 2021.[116]

Local Context

Despite this positive industry narrative, Etherington et al tell us that 'Stoke-on-Trent now regularly features in the bottom 10 UK cities for business start-up rates' and that 'job creation generally remains concentrated in low skill sectors, involving lower than average proportions of residents qualified to high levels and sizable skills gaps'.[112] In addition to this, 'the local economy comprises relatively high proportions of zero-hour contracts, underemployment and temporary contract working ', with the larger firms represented in the area tending 'to be owned by investors and interests outside the region', while medium sized firms, 'the so-called "aspirational middle"' are in short supply.[113] Such a negative matrix of demographic disadvantage is replicated in areas such as Sunderland, and yet there remains the firm desire to diversify and increase the film and HETV screen content production in that area by investment in their established USP.

In North Staffordshire, alongside the full-fibre infrastructure that the Silicon Stoke project has initiated, the reputation of the region's universities as hubs for gaming and digital technology training has the potential to be the region's USP that can ignite the local and national screen industries.

North and Central Staffordshire is privileged to have two established universities offering high quality degrees and facilities – Keele and Staffordshire University, the latter of which is celebrating 55 years of Media and Film courses in 2022-23. While both universities offer a degree provision in Film, Keele supplements this with a Media Studies offering and a focus on Music Production. Staffordshire University focuses more specificity within its Film Production degree on a practical range of screen industry skills, with a particular proficiency in the convergence between digital production and gaming technology. A range of the 32 courses offered include: Animation, CGI, and Visual Effects; Computer Gameplay Design and Production; Computer Games Design and Programming; Concept Art for Games and Film.

Staffordshire University's offering in gaming incorporates BEng and BSc degrees, which demonstrate the digital engineering and computer science that underpins this area. Therein, these degrees produce highly-technically skilled graduates, often in possession of diverse and exceptional portfolios of work that have been created within and beyond their studies, enabling them to access a range of roles within the screen industries. While ranked 17th in the Guardian league table,[114] which aggregates a range of factors into rank order, in November 2022 Edvoy course finder website rated Staffordshire the best university for game design.[115]

The challenges facing the success of the Silicon Stoke and the greater North Staffordshire area regarding maximising the potential of this industry training are twofold:

1. How to support the current generation of screen industry businesses who, as noted above, comment that the traditional route is useful but only as one step within a career progression that requires rigorous Continual Professional Development (CPD)?
2. How to develop and retain a strong pipeline of future digital artists and engineers within the local vicinity by supporting business development and growth?

There are a range of options that are open to developing and supporting industry and training in the face of these issues. Of specific interest is the placement of Staffordshire University as a funding, training, and knowledge excellence hub through which learning and development can be channelled. In addition to the traditional degree offering outlined above, its proximity to the Six Towns makes Staffordshire University the most appropriate institution to support such plans. The development of new infrastructure, such as the Catalyst building's facilities, and avenues to support business development through bespoke technical and entrepreneurial training are either imminent or already established.[117]

Takeaway

Whether it is the talent that drives creativity and innovation, or the leadership that coordinates organisational efficiency, productivity, and success, people make organisation work. Some people take academic routes into industry, some take vocational and apprenticeship routes – each have roles and benefits to individuals and organisations. Investing in people and building a pipeline of technically skilled artists alongside entrepreneurially savvy companies will ensure the opportunities of existing and future screen industry developments are maximised.

Work Package Three:

Investing in Talent

Summary

The Stoke-on-Trent city-region benefits from Staffordshire University's and Stoke-on-Trent College's recognised excellence in producing highly skilled graduates in traditional screen production skills as well as digital VFX, animation, gaming, and immersive technologies. There are opportunities to create stronger partnerships between educational institutions, industry, and the local authority that can solidify this highly marketable facet of the region. Through such close connections the educational institutions can also go beyond the traditional Higher and Further Education provisions to offer bespoke CPD for the local industry. This will increase local business's ability to gain and retain contracts within a rapidly evolving screen industry landscape.

Short Terms Focus (0-2 years)

Strategic Aims

- Consolidate the region's position as a leading venue for film, digital, and game technology training in Higher Education.
- Develop strong links with industry.
- Encourage innovative and diverse employment avenues for graduates.
- Advocate for a range of vocational as well as traditional education routes into industry.

Operational Tasks

- Promote Staffordshire University's Higher Skills and Engagement Pathways (SHSEP) and Staffordshire E-Skills & Entrepreneurship Gateway (SEGway) programmes. These Programmes cover a variety of CPD courses in digital and technical skills.[118]
- Establish a "Training" branch of the Stoke Screen Office (SSO) and its website, which highlights the availability of CPD courses run locally and online, as well as being a hub for ScreenSkills and other national training details and Higher Education routes.
- Contribute to the development of vocational as well as traditional education routes into industry via Further Education and industry networking. This is a vital opportunity to link the local authority, educational institutions, and industry

Costings

- Staffordshire University's SHSEP and SEGway programmes are currently funded via EU funds and will be free of cost. These courses can utilise University expertise and curated specifically for local businesses. Offered through EU funding, there is a short window of June to September 2023 to deliver this training.
- The costings of a Training branch within the website and directory of the SSO would be combined with the initial costs for the website. It would need to be populated though by SSO staff and so consideration of this in terms of labour reallocation would need to be made in respect of the staffing of the SSO.

Impacts

- SHSEP and SEGway programmes offer an almost immediate boon to local businesses by creating bespoke and necessary training in both technical and entrepreneurial skills. This will benefit the ability of local screen industry companies to stay current with technological developments and inspire new ways to grow their brands and hones skills in talent and entreprenuerial management.
- Linking the regions screen content talent with a pool of training resources is vital to demonstrate a robust and proactive support structure from the local authority towards the screen industries, which will help build the reputation of the region as serious about its screen industries.
- Forging closer links between new entrants, industry, and training providers is vital to securing the brightest talent remains in the city-region, contributing to the economic, industrial, and cultural prosperity of the North Staffordshire area.

Medium (2-5 years) and Long Term Focus (years)

As noted, planning far into the future is unwise especially within the context of technological and industry developments across rapidly shifting and emerging sectors. Therefore, these medium- and long-term recommendations are strategic rather than operational in nature.

- Solidify the region as a hub for training and new business development in the areas of digital pre- and post-production effects and gaming technology convergences with film and other screen content production. This will consolidate the impact of the Silicon Stoke project's work.
- Develop Stoke-on-Trent's reputation as a pioneering location where old industries meet the digital future. When the local industrial infrastructure of full-fibre connectivity ceases to be a USP, a new narrative needs to have been established around how Stoke-on-Trent uniquely combines old and new industries into a multi-faceted cultural and industrial hub.

Work Package Four:
Investing in the Future
Summary

This final Work Package requires that the local authority be alert and reactive to shifts and opportunities within the landscape of media convergence, while also being proactive in forging ahead with the ambition to make Stoke-on-Trent a hub for digital pre- and post-production skills that link gaming technologies with screen content producers. The SSO Steering Group is the perfect forum to ensure joined-up thinking between the strategic directions of travel that govern much of this Work Package and the day-to-day support of the local authority.

We cannot be certain what opportunities may emerge in this area over the short, medium, or long term, though some nascent ones are highlighted below. While we make recommendations in terms of strategy and operational tasks, the foundational underpinning of this Work Package is to cement the strong ties with education providers and industry stakeholders within and beyond the city-region as this will support swift innovation and responses to industry and sector developments.

Short Terms Focus (0-2 years)
Strategic Aims

- Support and establish initiatives that pioneer media convergence to establish the future USP of the regional industry.
- Foster joined up thinking between different creative industries to generate buy-in for the new direction of screen industries.
- Utilise digital technologies to dynamically promote the diverse history and culture of the city-region.

Operational Tasks

- Network with the BFI to establish a satellite “Expanded” festival, drawing on national as well as local artists and creative endeavours to highlight the complimentary aspects of the historic and the futuristic within Stoke-on-Trent. Aligned with the *BFI 2033* strategy, this project would celebrate region, history, and the expanded future of the screen industries.
- Promote Staffordshire University’s Higher Skills and Engagement Pathways (SHSEP) and Staffordshire E-Skills & Entrepreneurship Gateway (SEGway) programmes. These courses cover a variety of CPD courses in Entrepreneurship and Innovation, and Business, Marketing and Sustainability.[119]
- Lobby Staffordshire University to expand the reach of the Hatchery and Incubation business support suites to incorporate digital Start-Ups within the creative industries.[120]
- Create a suite of tax incentives that support extant and emerging organisations, from reduction in business rates, to advocating for a lowering of Animation Tax levels that make the UK significantly less competitive than European neighbours.
- Establish a branch of SSO that foregrounds media convergence and continues to build opportunities to exhibit and promote Stoke-on-Trent as a hub for innovative new work and skills training in this area.

Costings

- BFI “Expanded Satellite” Festival – The local authority should advocate for a large-scale cooperative project with the BFI FAN.
- Staffordshire University’s SHSEP and SEGway programmes are currently funded via EU funds and will be free of cost. These courses can utilise University expertise and be curated specifically for local businesses. There is a short window of June to September 2023 to deliver this training.
- Start-Ups taking residence in the Hatchery and Incubation business support suites can cost up to £4000 per business per year - in co-operation with Staffordshire University, produce a match-funded sharing of financial commitments.
- Tax incentives will require careful investigation beyond the remit of this report, however, if this industry is genuinely to be the future direction of a major part of the Stoke-on-Trent economy, then such financial support is warranted and productive.

Impacts

- Propelling the BFI “Expanded” initiative into the regions can kick-start cultural exchanges between different media organisations within and across Staffordshire and the nation.
- The training in leadership and entrepreneurial skills will give robust support to emerging start-ups and support the effective management of existing organisations to ensure the sector is both financially sound and able to retain the best talent.
- The focus on media convergence at the SSO should begin from the established SSO employees and so not require additional budgets. However, this focus would also benefit from coordination between education and industry, so the Steering Group will be vital in supporting this development of the SSO.
- The Hatchery and incubator initiatives offer a location to not only support and house new companies, but a space where diverse groups can collaborate and innovate.

Medium and Long Term Focus

- Establish Stoke-on-Trent as a national centre of excellence for digital pre- and post-production and VFX, and the vanguard at attracting and supporting innovative new businesses that demonstrate the diverse utility of such skills in film, TV, gaming, VR, technologically-immersive activities, from virtual production in feature films, to wearable tech, e-sports, and the development of metaverse platforms.
- Establish a regular Expanded Festival and national exhibition/conference for digital technology innovations.

Conclusion, Findings and Recommendations

Conclusion:
A New Beginning

The data gathered from the 2009 report is no longer available. There was much progress made in local content production in the 2010s, but that progress is now lost, and the Stoke Film Office has fallen into obscurity. In short, this is a new beginning. The future of the screen industries in Stoke should not be littered with decade-wide gaps between such research, nor reliant on a single channel through which the growth of the industry is focused.

We start from a small base, as the findings show, but it is a sophisticated base of long-standing companies that are ambitious, enthusiastic, motivated, and skilled. They are supported by a state-of-the-art digital infrastructure and a range of Levelling-Up developments across the Six Towns, united in the ambitions to raise standards in Stoke-on-Trent and cast-off narrow reputations of an industrial landscape consigned to history and a "left-behind" area that cannot stride confidently into the digital age. Such ambitions speak to the local industries, the communities, the culture, and the future of Stoke-on-Trent.

The aim of this report has been to establish and understand the current state of the local screen industry and propose ways to nurture and grow it but also to maximise the potential of the attributes of Stoke-on-Trent. This cannot be done by following a blueprint of another regional success. Instead, this report has rigorously engaged with the history, culture, industries, and future of Stoke-on-Trent because the narrative that the city is attempting to forge for itself is a distinctive narrative, a specific one, a unique narrative where the old and the new meet. This narrative is embedded in the screen industries at large.

National stakeholders recognise the need to support traditional as well as new and expanded forms of screen content production, which encompasses immersive, VR, gaming technologies, virtual production, and digital VFX. Due to its digital infrastructure and the excellence

A distinctive narrative, a specific narrative, where the old and the new meet

of its educational institutions in training and upskilling new talent, Stoke-on-Trent is uniquely placed to maximise the potential of this expanded screen industry. This will be achieved through long-term strategic planning and short-term delivery of actions to support the industry, but it must be delivered through partnerships between the local authority, industry stakeholders (local and national), and educational institutions. No single Film Office, Council department, University, or company can achieve and sustain this future independently – it will take a community of stakeholders to deliver for the local industry and for the local region.

Findings

01

Contextually, there is a common history of film engagement within the social and cultural practice across the Six Towns of Stoke-on-Trent. Recently, the pandemic has disrupted the film and television industry, but the impact of Covid-19 on production and consumption at a commercial level is nearly eradicated, with 2019 levels projected to return within a year.

02

The challenge to growth in many sectors, from business to tourism, has been to diversify from **the industrial legacy and narrative of "the Potteries",** which predominates in the reputational thinking around Stoke-on-Trent. While mitigating such challenges is one aspect of the Levelling-Up agenda, it is difficult to forge a new local narrative that translates at a national level.

03

Recent unsuccessful bids to become the UK Capital of Culture and a regional hub for Channel 4 reflect this difficulty. However, these bids demonstrate ambition and have led to gains that support a renewed investment in Stoke-on-Trent's industrial and cultural diversification, as part of establishing a new narrative. This new narrative is encapsulated by the digital infrastructure of the Silicon Stoke initiative.

04

National Stakeholders, from the BBC to the BFI FAN, have placed **regional development at the heart of media expansion and diversification agendas** in the UK, in line with the Levelling-Up agenda that aims to recalibrate regional disparities in outcomes as well as opportunities.

05

Silicon Stoke represents a rare opportunity to propel the local screen industries and attract new business into Stoke-on-Trent through consolidating a USP of digital connectivity. However, the window to maximise this digital advantage is narrow because 5G and full-fibre connectivity is being installed apace across the UK and will be the norm in most cities by 2025.

06

There is much room to grow the local screen industries as it is represented by a very small base. However, these organisations are enthusiastic and produce a range of screen content **spanning feature films to animation and commercial projects.** There is also a strong vein of community engagement and support for new entrants into the industry from local organisations.

07

The majority of business secured by local companies is commissioned by clients beyond the Staffordshire borders. This illustrates one of the reasons why, **although many skilled graduates emerge from Staffordshire University (a renowned hub for digital, screen, gaming and immersive technology training), they are lost to larger metropolitan areas.**

08

The extant industry states tha**t robust local support in the shape of a Film Office is needed to fulfil production requirements and promote the region.** When a form of support was available via Stoke Film Office in the 2010s, **there was strong growth in content production and community engagement activities.** However, it took a decade and £2M in funding to achieve to that outcome.

09

Learning from other regions, different models of screen industry support and development have now shown alternative routes to growth. Any such route for Stoke-on-Trent should maximise the short-term benefits and strategic long-term potential of the Silicon Stoke infrastructure, the recognised quality of university training, and the local enterprises that develop talent and support start-ups.

10

Establishing a USP, developing partnerships, and taking a broad, innovative, and culturally engaged view of the screen industries (as promoted by the BFI, the national standard bearer) is the amalgamated route to both supporting the local industry in the short term, and building opportunities for regional and industrial growth in the long term.

Recommendations

Our recommendations are organised around four Work Packages:

Work Package One
Grow the Screen Industries

a) Establish Stoke Screen Office (SSO) - a hub for local industry, production facilitation, workforce networking, regional promotion, location management and exhibition, and a vehicle through which to shape Stoke-on-Trent's screen industry reputation.

b) Initiate a SSO Steering Group - a body to facilitate joined up thinking and a "film-friendly" ethos between different council departments and establish partnerships with other local authority and national stakeholders.

c) Engage the Local Industry – establish a biannual forum with local industry that updates data gathered in this report, communicates achievements, and shares constructive pathways to continued growth.

Work Package Two
Building an Audience

a) Employ a Screen Outreach Coordinator (SOC) to manage, promote, document, and coordinate community engagement events. The SOC would build partnerships with local stakeholders such as Film Hub Midlands on behalf of the local authority and the residents of North Staffordshire.

b) Purchase equipment to support screenings in diverse locations across the Six Towns and invest in studio space to enable community participation projects to be created.

c) Inaugurate a Medicinema hub in a local hospital and pioneer similar initiatives with local care homes to demonstrate the benefits of screen cultures to society broadly.

Work Package Three
Investing in Talent

a) Create strong partnerships between education institutions, industry, and the local authority to solidify and promote the highly marketable fact that Staffordshire University and Stoke-on-Trent College have an industry recognised excellence in producing highly skilled graduates in traditional screen production practices as well as digital VFX, animation, gaming, and immersive technologies.

b) Co-ordinate with educational providers to offer bespoke CPD courses for the local industry to maintain cutting edge knowledge in a rapidly evolving sector.

c) Develop alternative routes into the industry through vocational training and apprenticeships that support the pipeline development initiatives of local companies and educational institutions.

Work Package Four
Investing in the Future

a) Coordinate with SSO, its Steering Group, and SOC to ensure operational and strategic duties are equitably balanced between supporting the current industry and region, and long-term planning in the areas of digital media convergence.

b) Identify emergent organisations and initiatives that could be attractive to Stoke-on-Trent and the Silicon Stoke project for exhibition, innovation, creative partnering, and regional networking e.g. BFI's 'Expanded' Initiative.

c) Secure incentives and training for new business creation through partnering with the Innovation Enterprise Zone (IEZ) at Staffordshire University to support start-ups and emerging businesses in these areas of digital engineering.

Recommendations

01
Growing the Screen Industries

Recommendation

- Establish Stoke Screen Office (SSO) - a hub for local industry, production facilitation, workforce networking, regional promotion, location management and exhibition, and a vehicle through which to shape Stoke-on-Trent's screen industry reputation.

- Initiate a SSO Steering Group - a body to facilitate joined up thinking and a "film-friendly" ethos between different council departments and establish partnerships with other local authority and national stakeholders.

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03
Investing in Talent

Recommendation

- Create strong partnerships between education institutions, industry, and the local authority to solidify and promote the highly marketable fact that Staffordshire University's and Stoke-on-Trent College's have an industry recognised excellence in producing highly skilled graduates.

- Co-ordinate with educational providers to offer bespoke CPD courses for the local industry to maintain cutting edge knowledge in a rapidly evolving sector.

- Develop alternative routes into the industry through vocational and apprenticeship routes by supporting the pipeline development initiatives of local companies and educational institutions.

04
Investing In the Future

Recommendation

- Coordinate with SSO, its Steering Group, and SOC to ensure operational and strategic duties are equitably balanced between supporting the current industry and region, and long-term planning in the areas of media convergence and digital pre- and post-production.

- Identify emergent organisations and initiatives in national and international fields that could be drawn to Stoke-on-Trent and the Silicon Stoke project for exhibition, innovation, creative partnering, and regional networking, such as the BFI's 'Expanded'.

- Secure incentives and training for new business creation through partnering with the Innovation Enterprise Zone (IEZ) at Staffordshire University to support start-ups and emerging businesses in these areas.

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It will take a community of stakeholders and a network of partnerships to deliver for the region.

Our pragmatic and adaptable recommendations will nurture growth in content production, talent development, and economic returns, as well as foster cultural, social, and civic engagement with North Staffordshire's screen industries.

Establishing a USP, developing partnerships, and taking a broad, innovative, and culturally engaged view of the screen industries (as promoted by the BFI, the national standard bearer) is the amalgamated route to both supporting the local industry in the short term, and building opportunities for regional and industrial growth in the long term.

About the Authors

Dr Mark McKenna is an Associate Professor in the Film and Media Industries and Director of the Centre for Research in the Digital Entertainment and Media Industries at Staffordshire University. Mark has published widely on cinema and is the author of *Nasty Business: The Marketing and Distribution of the Video Nasties* (Edinburgh University Press, 2020) and *Snuff* (Liverpool University Press, 2023), and is co-editor of the Routledge collection Horror Franchise Cinema (2021).

Dr Andrew Lennon recently completed his doctorate at the University of Birmingham. His primary research focuses on the history and Contemporary developments of documentary practices in theatre and performance. He holds an MA by Research specialising in documentary performance and film. He has a background in lighting and set design, and has published on the productive qualities of darkness in the Staging of Samuel Beckett's short works as well as the "gaming" of protest in contemporary politics.

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