

TODAY'S OBJECTIVES

By engaging directly with an array of employers representing Hertfordshire's priority sectors Careers Leaders/Teachers will...

- Gain a better understanding of Hertfordshire's priority sectors by hearing directly from employers.
- Gain insights into the skills and qualities that employers require young people to have in the workplace.
- Know where to access information and resources to use in school that can be shared with colleagues, students and parents.







We know our local economy - its strengths

Over 10 years, economic output (GVA) has grown by £10bn and we have created over 100,000 jobs. Hertfordshire is powering innovation and pioneering new ideas across a diverse range of industries that have a global impact on our daily lives, offering real investment and cross-collaboration opportunities. Its five key sectors are driving the UK economy and its growth priorities for the future.



Present







INTRODUCING...

LMI CONFERENCE **JAN 2025**

HERTFORDSHIRE FUTURES







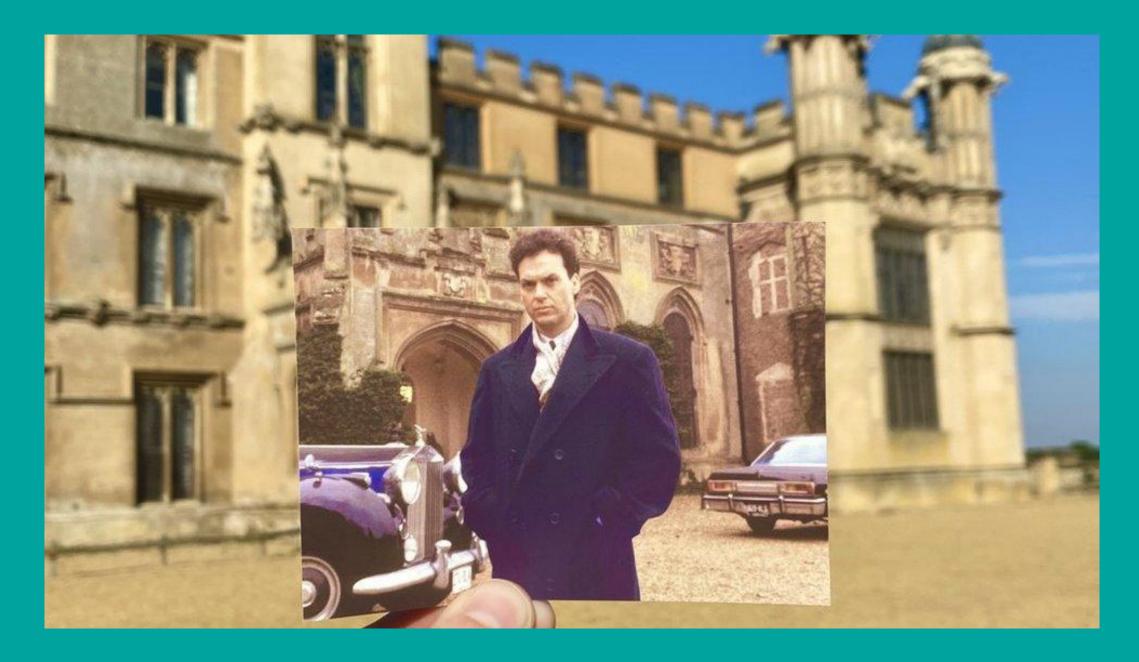


NAME THAT PLACE...



























UK SCREEN INDUSTRY SIZE 23/24



£15 BILLION

2024 GVA estimate - BFI



6.9% UK Economy

Larger than
Manufacturing, Cars
or Life Sciences



5.6% Growth

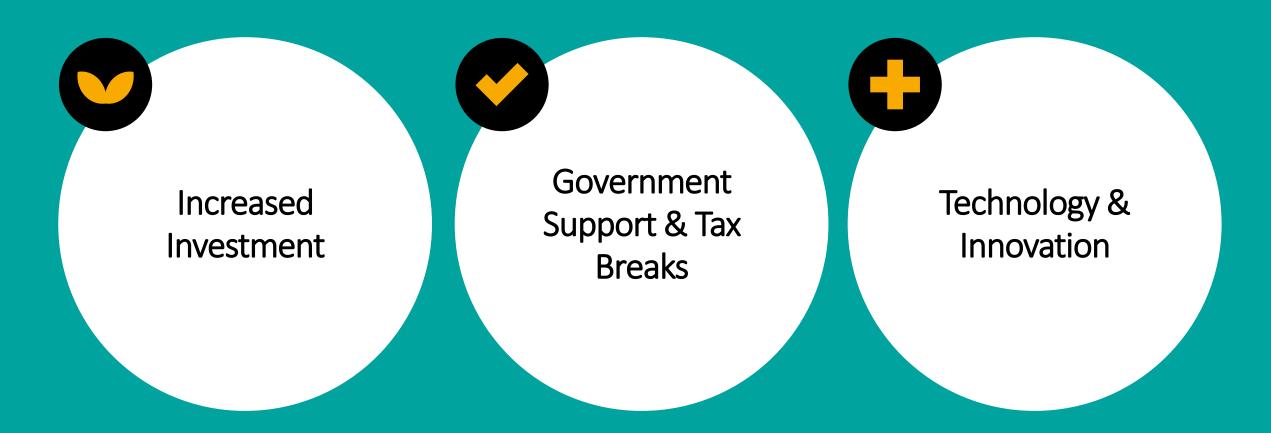
UKs reputation High Quality, HETV & Streaming



250,000 Jobs

Both directly & indirectly

WHAT IS DRIVING THAT GROWTH?



WHAT IS DRIVING THAT GROWTH?



National Overview

2020

£2.84 billion spend

COVID-19 halted all production from for 3 months (Q4 signs of recovery)



2021

£5.64 billion spend

Industry **bounces back** from pandemic outstripping 2019 by £1.27 bn



2022

£6.27 billion spend

Record year & recovery from pandemic – HETV 69%, £4.3 billion



2023

£4.23 billion spend

US Industrial Action Impact



The Fragility of the Film & TV Sector



Dependence on Global Productions: Hertfordshire relies heavily on large international productions. Disruptions, such as the **writers' and actors' strikes**, show how vulnerable the industry can be.



Production Delays & Economic Impact: The strikes caused months of delays, reducing income, employment, and local business activity.



Unpredictable Nature: The industry's cyclical nature brings peaks and troughs, impacting local supply chains, crew availability, and services.



Risks for Independent Productions: Independent filmmakers face the greatest risks, with financing and distribution becoming even more difficult during global downturns.



Skills Retention: Production halts create workforce instability, with highly skilled crew members often leaving the sector, making recovery harder.

BRIDGING THE SKILLS GAP

Depending on which source you consult it is estimated the industry needs between

20,000 - 40,000

People by 2028



SKILLS SHORTAGES - UK CREATIVE INDUSTRIES

Production

- Location marshal
- Accountant
- Production secretary
- Production
 Manager
- Production
 Coordinator
- Production Assistant

Facilities

- Caterers
- Venue managers
- Security staff

Art Department/ Construction

- Costume designers
- Prop makers
- Hair and make-up artist
- Carpenters
- Painters
- Plasterers
- Riggers

Technical & Electrical

- First and second assistant camera
- Camera operator
- Lighting technician
- Grip

Fashion and Textiles

- Sewing machinist
- Pattern cutter

Games

- 3D programmer
- Animator
- Artist
- Back-end programmer
- Game designer
- Network programmer
- Technical artist directors
- Technical artist
- UI designer

Craft

- Marionette making
- Violin bow making

Post-production & VFX

- Editor
- Edit assistant
- VFX Effects
- VFX Rigging
- Sound effects
- Facial modeller
- Real-time engine coder
- Colourist
- Dubbing mixer

Animation

- 2D animator
- Production manager
- 2D designer
- Background designer
- Storyboard artist

Distribution & Marketing

- Financial analysts
- Rights and sales analysts
- Pay Per Click
 Executive
- Data experts

"The UK screen sector, a key part of the creative industries, is a global success, producing content that unites, provokes and inspires millions. This success is built on a highly skilled workforce, making the UK a leader across genres."

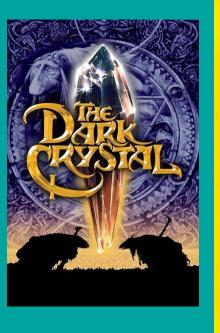
Laura Mansfield, ScreenSkills Chief Executive



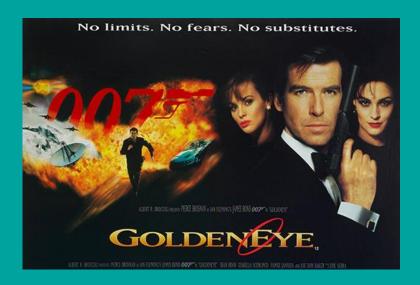
BRITISH HOLLYWOOD





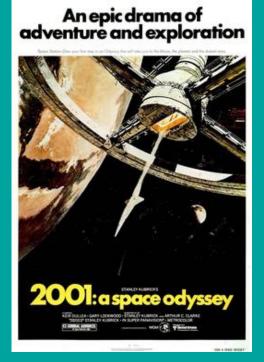




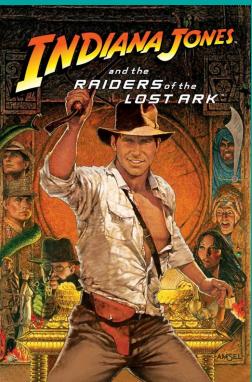




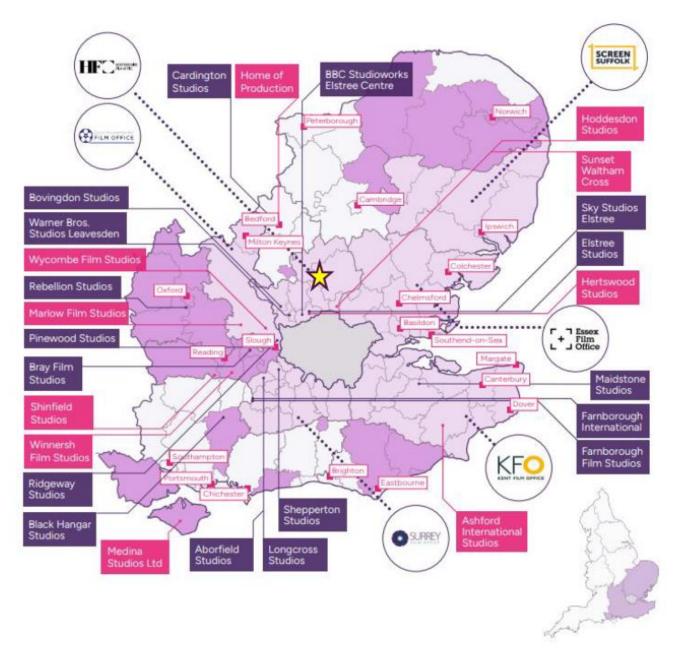








EAST & SOUTH EAST REGIONAL HUB



2024 - A BLOCKBUSTER YEAR FOR HERTFORDSHIRE!



- Boys in the Boat
- Masters Of The Air
- The Crown S6
- Ghostbusters Sequel
- Barbie
- Wonka

- Mary & George
- Beetlejuice 2
- Paddington in Peru
- Slow Horses
- Wicked: Part 1 and 2

WHICH HEADLINE TO BELIEVE?

Hertfordshire hailed as 'the new Hollywood' after Barbie and Wonka prove box-office smashes

Hollywood's big boom has gone bust







Hertfordshire

State of the

Market in

In 2023 Hertfordshire was 55% down in line with national trends from the previous year.



As of Sept 24, approx. 90% of stage space occupied across the county with long term commitments from the Major studios over the next decade.



According to David Conway, CEO of Pinewood, Hertfordshire has more studio filming than all of LA.



Screen Hertfordshire a partnership between the studios, collages, University and Hertfordshire Futures to launch in January 2025



AXA have purchased BBC Elstree Studios and plan major redevelopment of the existing footprint.



Studio's are looking to continue expanding in the region and buying up new sites

THE FUTURE OF FILM AND TV IN CONTEXT

Hollywood writers fear losing work to AI

(27 July 2023

SAG strike 2023



Love Island's Tasha Ghouri and Andrew

Love Island's Tash

Jack Thorne during MacTaggart Lecture

Hollywood's attempts to encourage diversity 'performative', study finds

Two new studies show female film-makers still underrepresented despite recent successes such as Barbie



'Hold on to your seats': how much will AI affect the art of film-making?



Robin Wright and Tom Hanks, de-aged using Al in Here. Photograph: BFA/Alamy

← TIMECO₂ FUTURES

enew deal after

how for second time

ost

ership

Film and TV's Carbon Footprint Is Too Big to Ignore

6 MINUTE READ

Hard to get backing for diverse films, director says



rs in UK

ort

THE FUTURE OF FILM AND TV - DEI





Contributions by Black, Asian and other minority ethnic groups, women, LGB and Trans people are either at or above comparable national figures, while contributions by disabled people and the over-50s are showing year-on-year improvement, but still fall below population and workforce estimates.

Creative Diversity Network



creative diversity











THE FUTURE OF FILM AND TV - SUSTAINABILITY

- Sustainable production practices
- Sustainable studio practices
- Green jobs





THE FUTURE OF FILM AND TV – AI AND TECH

- Al in the design process
- Al as a tool for pre-production and development analysis
- Al in the post-production and VFX process

- 3D printing
- Virtual Production



WHAT DOES THIS MEAN FOR YOUR STUDENTS?



KEY NOTE 1 10:00 – 10:40 FILM, MEDIA AND CREATIVE

WORKSHOP 1 10:50 – 11:40





WORKSHOP 2 11:40 – 12:30

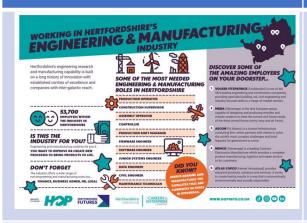


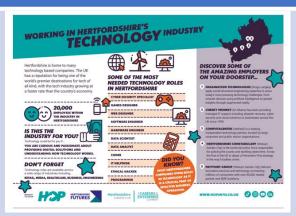
ENGINEERING AND ADVANCED MANUFACTURE



FILM, MEDIA AND CREATIVE











AIRBUS

MBDA

AMBER MOUNTAIN

COMPUTACENTER

SKY STUDIOS ELSTREE

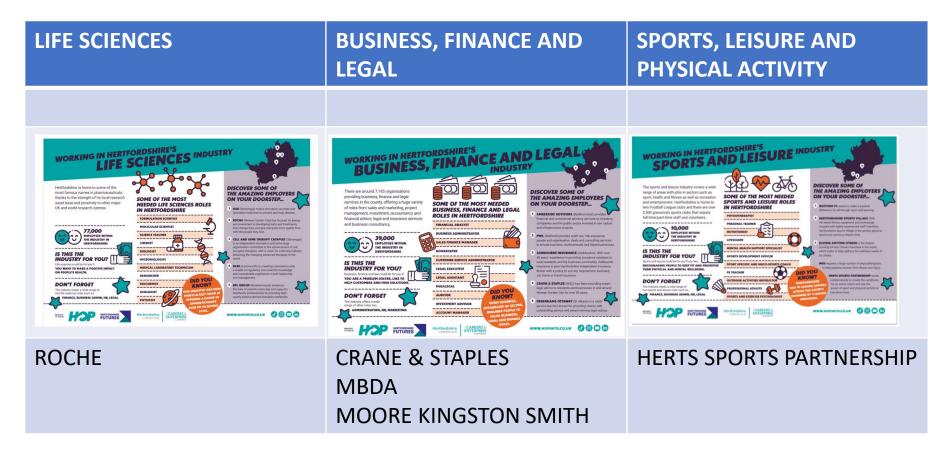
WARNER BROS STUDIOS

HERTFORDSHIRE CONSTABULARY

HERTFORDSHIRE FIRE AND RESCUE

WORKSHOP 3 14:05 – 14:55





PLEASE COMPLETE THIS POST-WORKSHOP SURVEY:





ACTION PLAN AND NEXT STEPS

