

# Impact Evaluation of the Film and TV Production Restart Scheme

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**&**

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## List of abbreviations

BCR	Benefit-cost ratio
BFC	British Film Commission
BFI	British Film Institute
CJRS	Coronavirus Job Retention Scheme
DCMS	Department for Culture, Media & Sport
FTE	Full-time equivalent
GVA	Gross value added
HETV	High-end TV
IP	Intellectual property
KPI	Key performance indicator
ONS	Office for National Statistics
Pact	Producers Alliance for Cinema and Television
PSB	Public service broadcaster / broadcasting
SEISS	Self-Employment Income Support Scheme
SVOD	Subscription video on demand

## Executive summary

With the onset of the COVID-19 pandemic in Spring 2020, the risks of film and TV production stoppages or even cancellations rose dramatically. In fact, at the beginning of the pandemic, many producers were unable to obtain insurance against COVID-19 risks at commercially feasible terms or were even completely forestalled from the insurance market. This 'market closure' was particularly acute among smaller domestic independent producers<sup>1</sup>, as the large studio productions often originated by US studios or global subscription video-on-demand (SVOD) services were better able to self-insure or continue filming under pre-existing insurance policies that had yet to expire.

In response to this market closure, the UK Government introduced the **Film and Television Production Restart Scheme** (the "**Scheme**") – a Government-backed indemnity scheme to cover certain COVID-19 related losses incurred by domestic film and TV producers – such as losses that arose if material cast or crew were unable to work or if a production was interrupted, postponed or abandoned because a UK civil authority imposed restrictions.<sup>2</sup>

The Scheme was first announced by the Government on 28 July 2020 and became effective from that date, although it officially opened to receive registration applications on 16 October 2020. The Scheme was initially meant to stay open until 31 December 2020; however, it was subsequently extended a number of times. Under the final extension, the Scheme remained open to registrations until 30 April 2022 and covered losses incurred up until 30 June 2022.

Prior to 1 November 2021, film and TV productions that registered for the Scheme were required to pay a fee equal to 1% of the value of the total production budget. On 1 November 2021, the Government raised the fee rate to 2.5%. The fee increase was viewed as an appropriate means to balance the needs of the film and TV production industry, and the Government's need to deliver value for money – i.e. ensure that Government intervention is delivered in a cost-efficient manner whilst maximising its positive impact on the UK's economy and society.<sup>3</sup> The fee increase was also considered an important step towards a return to commercial insurance market rates after the scheme's closure.

The following report details the results of the impact evaluation of the Scheme conducted by Nordicity and Saffery Champness LLP. This impact evaluation is distinct from the process evaluation of the Scheme, completed by RSM Consulting and published by the Department for Culture, Media & Sport (DCMS) in January 2022. That process evaluation assessed how the Scheme had operated between October 2020 and September 2021, and provided DCMS with recommendations for improving the Scheme's delivery for the balance of its tenure.

Considering the complexity of the situation, the unprecedented nature of the policy challenge, the turmoil in the insurance markets and real economy and the multiple stakeholders involved, the Government was able to introduce the Scheme relatively quickly. Indeed, it was the unified commitment of stakeholders from across Government and the film and TV industry which was a key factor in this quick rollout.

The Scheme take-up was very robust. Indeed, some producers had hoped the Scheme would have started earlier, so they could resume production sooner, after the British Film Commission (BFC) and Producers Alliance for Cinema and Television (Pact) had introduced guidelines and COVID-19 safe working practices. Nevertheless, the Scheme was introduced early enough such that once film and TV production had resumed

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<sup>1</sup> Independent producers and independent production includes producers, production companies, films and TV programmes made without the financial support of one of the five major global film studios – Walt Disney Studios, NBCUniversal, Warner Bros. Entertainment, Paramount or Sony Pictures. Without this financial backing, independent producers and production companies must raise their own financing from broadcasters or other third parties to make television programmes or films.

<sup>2</sup> UK civil authority restrictions include regulations, written directions or written guidance issued by Government entities that prevent a film or TV production cast or crew from accessing a studio facility, filming location or other place of work required to continue the production. In particular, it includes any Government-imposed lockdown or self-isolation requirements that prevent production personnel from accessing their place of work.

<sup>3</sup> RSM Consulting (2022) *Process Evaluation of the Film and TV Restart Production Restart Scheme*. P. 16.

the UK was well-positioned vis-à-vis other countries as a location for both international and domestic production.

Over the span of 23 months plus 2 days (i.e. 28 July 2020 through to 30 June 2022), the Scheme supported 1,259 individual film and TV productions and £3.06 billion in production expenditure. High-end TV (HETV) programming accounted for over half of this total production expenditure (£1.67 billion).

The costs to deliver the Scheme are expected to total £5.7 million; claims for compensation were (as of March 2023) expected to total £49.5 million<sup>4</sup>, thereby bringing total Scheme costs to £55.2 million. The Scheme collected £35.6 million in registration fees from producers (net amounts contractually retained by Marsh Commercial). As a result the net cost to the Government is expected to be £19.6 million.

The Scheme required producers to attest that their production would not have otherwise proceeded with Scheme support (i.e. the production may be considered additional on account of the Scheme). So based on this 'de jure' definition, the Scheme was 100% additional. The survey research conducted as part of this evaluation indicated that on a 'de facto' basis, the Scheme's additionality is actually closer to 74% - although that is still relatively high. Most of the producers who participated in the interview research for this evaluation felt very strongly that they would not have been able to restart or start production without the Scheme, thereby putting their businesses in clear jeopardy of financial failure. That impact would have deprived audiences of new TV programmes and films and the ability of the sector to recover.

Scheme-registered producers reported that their productions created 63,500 crew positions plus a further 37,100 cast roles, for a total of 100,700 roles.<sup>5</sup> Indeed, given that large swathes of the film and TV workforce were not eligible for the Coronavirus Job Retention Scheme (CJRS) or Self-Employment Income Support Scheme (SEISS), the Scheme turned out to be an essential lifeline for thousands of production industry workers and their families.

The evaluation team's economic analysis found that the Scheme generated 48,500 full-time equivalents (FTEs) of additional employment and £2.25 billion in additional gross value added (GVA) for the UK economy, when direct, indirect and induced economic impacts are included. This total additional impact included 23,100 FTEs of employment and £1.15 billion in GVA directly within the UK's film and TV production industry, with the balance of the impact generated within the supply chain (i.e. indirect economic impacts) and across the wider UK economy (i.e. induced economic impacts).

The Scheme not only helped production businesses by allowing them to resume production, but it also restored their business confidence, meaning that many production companies could start to plan for the future again and look to innovate. Indeed two-thirds of producers reported that the Scheme had a positive impact on their innovation, although the impact on their ability to take risks was less. Crucially, the Scheme allowed many production companies to create content so they could tap into what was fast becoming a sellers' market. This bolstered UK production companies' international sales, thereby, further adding to the Scheme's economic contribution.

In terms of wider policy objectives, the Scheme made a positive contribution to the Government's levelling up agenda by stimulating a larger share of film and TV production outside of London than had previously been reported by the BFI (in 2019 for film and HETV production). The Scheme guidelines encouraged producers to increase equity and diversity in the film and TV production industry; the evaluation evidence suggests that one-third of participating producers increased the diversity of their creative teams and their on-screen content.

With a net cost to the Government of £19.6 million and £2.25 billion in additional GVA generated, the Scheme yielded a benefit-cost ratio (BCR) of 115:1. Government guidance indicates that a BCR of over 4:1 should be considered 'very high' in terms of delivering value for money.<sup>6</sup> Whilst the Scheme's BCR was very high, it is

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<sup>4</sup> At the time of writing, some claims remained unsettled. This evaluation report will be updated with the final claims figures, once all claims payments have been made.

<sup>5</sup> The sum of the number of crew and cast roles created across Scheme-registered productions is higher than the numbers of FTEs and will overstate the number of people employed because an individual may work on more than one production, particularly, subsequent editions of the same television series. The sum of crew and cast roles will also overstate the level of employment on a full-time equivalent basis since most crew and cast employment lasts for less than one year. In fact, most crew and cast roles last for a period of months, weeks or even days.

<sup>6</sup> Department for Transport (2020) [Value for money indicator 2019](#). December (updated 19 December 2022).

important to recognise that the Government did assume a high degree of fiscal risk with the Scheme, within a market environment of extreme uncertainty. Indeed, the market uncertainty was too high for the insurance market to function and so the Government had to intervene.

Ultimately, the Scheme's claims are expected to total a maximum of £49.5 million. However, the Government did commit to paying up to £500 million in claims. Under a different scenario, the Government could have faced a much higher cost, without commensurately higher economic benefits. Simply put, if claims had approached the £500 million ceiling, the BCR would have dropped to 5:1 – although that would have still been considered very high.

Whilst the Government set aside £500 million to cover Scheme claims, the Scheme design and producers' diligence and commitment to the mitigation of COVID-19 meant that maximum expected Scheme claims (£49.5 million) will only be one-tenth of this earmarked amount.

From a value-for-money perspective, the Scheme was also very economic for the Government. Without the Scheme enabling a large swathe of film and TV production to restart, the Government would have likely faced an additional fiscal cost to support unemployed film and TV production workers via the CJRS, SEISS or Universal Credit.

The evaluation research demonstrates that the Scheme had a significant positive impact and delivered value for money. This positive result is more important, given that the Scheme was developed at pace in an environment of high market uncertainty. And whilst it is unlikely that the Scheme itself will have to be introduced again in the foreseeable future, the design and delivery of the Scheme can offer several recommendations for the development of other Government programmes in the future, particularly those that must be developed quickly and in an environment of high uncertainty.

For the most part, these recommendations reflect key learnings and good practices observed within the Scheme that could be applied to other government programmes in the future. In some cases, however, the recommendations do reflect areas of Scheme delivery that the evaluation research indicated could have been approached differently by the DCMS Oversight Team or Steering Board.

### **1. Provide clear and accessible guidelines accompanied by an information campaign to fully explain new guidelines**

Producers noted how many of the types of costs that they thought would have been covered by the Scheme did not qualify as eligible losses, so they felt the coverage was less than expected. This may have been due to a misinterpretation of the Scheme rules, or the expectation by producers that the Scheme would operate in a similar manner to insurance coverages that they were accustomed to using. These instances of misinterpretation emerged despite the fact that DCMS convened regular meetings with producers and offered a channel for producers to submit questions.

In the same way that DCMS sought to ensure that producers had all the information they needed to engage with the Scheme, it is important that novel – and even existing – programmes similar to the Scheme offer clear and accessible guidelines. This could be done by adopting information campaigns that included explanatory information sessions (i.e. physical or virtual roadshows), which would help reduce the likelihood of misinterpretation of the guidelines.

### **2. Direct industry business knowledge must be readily accessible to Government**

Government was able to design and launch the Scheme at pace because there was deep knowledge of how the production business worked residing directly within Pact, BFI and DCMS. This may not always be the case, where an industry may not be subject to the same regulation or policy support as film and TV production is. The same applies to the insurance or financial industry subject matter expertise needed to design, launch and deliver an indemnity or compensation programme such as the Scheme. Above all, the Government needs to be able to help build trust among all subject matter experts in order to deliver such a programme at pace, as it provides the foundation for the necessary collaboration and information sharing.

### **3. Enhanced evidence of commercial viability and additionality**

Within the Scheme, productions with budgets under £30 million could self-assess commercial viability and thereby the additionality of the Scheme. The evaluation's survey research revealed, however, that this self-

assessment could have been inaccurate in at least 6%<sup>7</sup> of cases, and possibly higher. Wherever possible, the Government should ensure that it can collect evidence to ensure that it can effectively scrutinise the additionality of intervention.

This is not an issue that is specific to the Scheme or even Government programmes similar to the Scheme. In fact, the need to collect evidence to assess the additionality of Government intervention is a key issue across all programme and policy evaluation. However, the key learning from the Scheme is that even where a programme is considered to be additional from a de jure perspective that does not necessarily mean that it also is on a de facto basis, and so alternate methods for assessing additionality should be incorporated into the programme monitoring and evaluation plan.

#### **4. Real-time programme reporting and dashboard**

For a novel programme such as the Scheme, it is vital that the Government can continually monitor its progress. It may not be sufficient to wait several months for a process evaluation to be commissioned and carried out. Instead, similar novel programmes – particularly where delivered by a third party – should incorporate as much as possible real-time or daily reporting and the use of dashboards. The Scheme itself did this using the key performance indicator (KPI) dashboard maintained by DCMS using weekly data supplied by Marsh Commercial. This type of KPI dashboard and real-time reporting, in general, will enable continued programme improvement to ensure it remains fit for purpose and responds to industry developments.

#### **5. Unenforceable social commitments should be included in guidelines and monitored, where specific interventions may not be feasible**

Whilst most of the Scheme’s social commitments were not enforceable, the inclusion of them in the rules formed an important channel for the Government to signal its policy intentions and encourage industry. Indeed, despite the unenforceability of the social commitments, the evaluation research did find that one-third of producers increased their social impact by increasing the diversity of their content. For other programmes, therefore, social commitments or other types of requirements that cannot necessarily be reasonably enforced should not be left out. Even in the absence of enforceability, such ‘encouragement’ requirements should be kept and monitored.

Still, it should be noted that the Scheme was designed primarily to stimulate film and TV production activity during the pandemic that would not have otherwise occurred. This policy goal is not necessarily contradictory to the Government’s policy goals related to increasing diversity and equality, and reducing bullying, harassment and racism in the workplace. However, specific policy objectives often require targeted intervention to achieve those objectives, rather than relying on indirect outcomes. So where the Government wishes to move beyond simply signalling its policy direction and would prefer to achieve tangible outcomes, it would be better to implement programmes that target social impact goals.

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<sup>7</sup> On the evaluation research survey, producers were asked to rate (on a scale of 0 to 10) the likelihood that their Scheme-registered productions would have proceeded without Scheme support. Six percent of survey respondents reported a likelihood of ‘10’ (i.e. 100%), under the 1% fee regime. Under the 2.5% fee regime, 7% of survey respondents reported a likelihood of ‘10’ or (i.e. 100%).



## 1. Introduction

### 1.1 Background

With the onset of the COVID-19 pandemic in Spring 2020, the risks of film and TV production stoppages or even cancellations due to the loss of key creative personnel, the absence of significant numbers of crew members, or simply the inability to continue filming due to social distancing restrictions or other governmental mitigation measures (e.g. ‘lockdowns’) rose dramatically. In fact, at the beginning of the pandemic, many producers were unable to obtain insurance against COVID-19 risks at commercially feasible terms or were even completely forestalled from the insurance market. This ‘market closure’ was particularly acute among smaller domestic independent producers<sup>8</sup>, as the large studio productions often originated by US studios or global subscription video-on-demand (SVOD) services were better able to self-insure or continue filming under pre-existing insurance policies that had yet to expire.

In response to this market closure, the UK Government introduced the **Film and Television Production Restart Scheme** (the “**Scheme**”) – a Government-backed indemnity scheme to cover certain COVID-19 related losses incurred by domestic film and TV producers – specifically losses that arose if material cast or crew were unable to work or if a production was interrupted, postponed or abandoned because a UK civil authority imposed restrictions.<sup>9</sup>

The Scheme was first announced by the Government on 28 July 2020 and became effective from that date, although it officially opened to receive registration applications on 16 October 2020. It was initially meant to stay open until 31 December 2020; however, it was subsequently extended a number of times. Under the final extension, the Scheme remained open to registrations until 30 April 2022 and covered losses incurred up until 30 June 2022. Notably, the initial Scheme premium of 1.0% of the production budget was increased to 2.5% from 1 November 2021.

In Autumn 2021, the Department for Culture, Media & Sport (DCMS) commissioned RSM Consulting to complete a process evaluation of the Scheme. This process evaluation, published in January 2022, assessed how the Scheme had operated during its first 12 months of operation, and provided DCMS with recommendations for improving the Scheme’s delivery for the balance of its tenure.

With the phased closure of the Scheme from summer 2022, the British Film Institute (BFI), on behalf of DCMS, commissioned Nordicity and Saffery Champness LLP to prepare an impact evaluation of the Scheme. In contrast to the RSM process evaluation, this impact evaluation was designed to focus on assessing if and how the Scheme achieved its ex ante objectives, made a positive impact on the UK economy and society, and delivered value for money.

### 1.2 About the Scheme

The primary objective of the Scheme was to support the UK’s film and TV production industry resume production activity during the COVID-19 pandemic. Whilst the easing of lockdown provisions and the introduction of COVID-19 protocols permitted film and TV production to safely resume production, broadcasters, distributors and other production financiers were largely reluctant to finance the production

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<sup>8</sup> Independent producers and independent production includes producers, production companies, films and TV programmes made without the financial support of one of the five major global film studios – Walt Disney Studios, NBCUniversal, Warner Bros. Entertainment, Paramount or Sony Pictures. Without this financial backing, independent producers and production companies must raise their own financing from broadcasters or other third parties to make television programmes or films.

<sup>9</sup> UK civil authority restrictions include regulations, written directions or written guidance issued by Government entities that prevent a film or TV production cast or crew from accessing a studio facility, filming location or other place of work required to continue the production. In particular, it includes any Government-imposed lockdown or self-isolation requirements that prevent production personnel from accessing their place of work.

during this period. The Scheme was backed by a Government commitment to cover up to £500 million in losses due to COVID-19 production delays and stoppages.

As noted above, the Scheme covered eligible losses incurred on or after the effective start date of 28 July 2020, although the Scheme began accepting applications for Scheme registration from film and TV producers based in the UK on 16 October 2020. The Government appointed Marsh Commercial, an established insurance broker, to administer the Scheme. It was supported by loss-adjusters with direct experience within the film and TV production industry – Sedgwick International and Spotlite Claims Ltd. – both of which were sub-contracted by Marsh Commercial to review and investigate complex claims.<sup>10</sup>

DCMS provided governance and oversight of the Scheme. In particular, DCMS formed a Steering Board comprising experts from the insurance sector, film and TV production sector and across Government. Among other things, the Steering Board provided high-level monitoring of the Scheme delivery and performance against key performance indicators (KPIs), and review and decision-making in relation to large claims.<sup>11</sup>

**Figure 1 Scheme timeline**



The DCMS Oversight Team provided day-to-day management of the Scheme’s suppliers including Marsh Commercial. Among other things, it reviewed applications and claims escalated by Marsh Commercial in accordance with certain thresholds and requirements, and determined if they should be further escalated to the Steering Board.<sup>12</sup>

Working with Marsh Commercial and the DCMS Oversight Team, the BFI provided monitoring of the UK film and TV market; and tracked the Scheme’s take-up, expenditure and earnings of all UK productions. The BFI also supported policy decision-making and provided assurance during the onboarding process to reduce instances of risk and fraud.<sup>13</sup>

Prior to 1 November 2021, film and TV productions that registered for the Scheme were required to pay a fee equal to 1% of the value of the total production budget (less applicable deductions). On 1 November 2021, the Government raised the fee rate to 2.5%. The fee increase was viewed as an appropriate means to balance the needs of the film and TV production industry, and the Government’s need to deliver value for money – i.e. ensure that Government intervention is delivered in a cost-efficient manner whilst maximising its positive impact on the UK’s economy and society.<sup>14</sup> The fee increase was also considered an important step towards a return to commercial insurance market rates after the scheme’s closure.

Over the span of 23 months plus 2 days (i.e. 28 July 2020 through to 30 June 2022), the Scheme supported 1,259 individual film and TV productions and £3.06 billion in production expenditures.

<sup>10</sup> RSM Consulting (2022) P. 9.

<sup>11</sup> RSM Consulting (2022). P. 16.

<sup>12</sup> RSM Consulting (2022). P. 17.

<sup>13</sup> RSM Consulting (2022). P. 9.

<sup>14</sup> RSM Consulting (2022). P. 16.

The Government set out the following six key strategic objectives for the Scheme.

1. **To restart UK film and TV production and aid economic recovery of this important sector**, by addressing the market failure of the unavailability of COVID-19 insurance for productions.
2. **To support film and TV workers and freelancers and reduce their dependence on other Government schemes** by ensuring productions can restart and new productions can take place.
3. **To support the rest of the film and TV value chain and broader economy such as the UK's VFX, post-production, catering, design, cinemas, broadcasters and video on demand platforms** by ensuring UK filming takes place and there is work further down the value chain and a diversity of content on UK platforms.
4. **To support the UK's cultural offer and promote consumer choice** by supporting UK small and medium-sized film and TV productions so they can restart and provide important and diverse cultural works to UK consumers.
5. **To promote diversity in the UK film and TV sectors** by making commitment to diversity objectives a condition for support.
6. **To promote exports and the UK's soft power** by supporting UK works representing UK values and identity.

From an international perspective, the Scheme was not unique. Many other countries introduced some type of film and TV production indemnity, insurance or guarantee scheme during the pandemic. A list of such schemes found in jurisdictions comparable to the UK can be found in Appendix A.

The specific design and operation of these restart schemes varied from country to country. However, it is notable that:

- The schemes in Germany and Ireland were only for the production of film and TV content with investment from national/public sector screen content funds.
- The German scheme allowed some costs incurred abroad to be covered, from February 2021 onward.
- The Australian scheme had a fee of 1% initially to be contracted into its indemnity scheme but in July 2021, it was increased to 2%.
- The Australian scheme required the screen content to have passed a *Significant Australian Content* test or to have been an official co-production.

KPIs for these schemes outside of the UK are limited, however, data for Canada's Short-Term Compensation Fund (STCF) scheme indicates that over a span of 28 months, it supported 1,577 productions with total budgets of CAD 5.81 billion (£3.45 billion).<sup>15</sup> In that respect, it was comparable in scope to the Scheme. To date, the STCF has paid out CAD 6.9 million (£4.1 million) in claims. Meanwhile, Australia's Temporary Interruption Fund (TIF) registered 114 productions with combined budgets of AUD 970 million (£540 million).<sup>16</sup>

### 1.3 About the evaluation

The primary objective of this evaluation was to assess the impact that the Scheme had on the productions and production companies that registered for the Scheme, as well as the wider impact it had on the sector and the UK economy. In particular, the evaluation had two distinct elements:

- **Impact evaluation:** to assess whether the Scheme achieved its desired outcomes and whether it has had any unintended (positive or negative) consequences
- **Economic evaluation:** to measure in monetary terms the Scheme's impacts on the production industry and UK economy (if appropriate) relative to its delivery costs and thereby assess the extent to which it represented value for money for taxpayers.

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<sup>15</sup> Telefilm Canada (2022) "[Short-Term Compensation Fund for Canadian Audiovisual Productions \(STCF\)](#)".

<sup>16</sup> Screen Australia (2022) "[Temporary Interruption Fund](#)".

Among other things, the evaluation investigated the specific evaluation questions listed in Table 1.

**Table 1 Impact and economic evaluation questions**

Theme	Evaluation questions
Organisational- and culture-sector Impacts	<ol style="list-style-type: none"> <li>1. What impact did the Scheme have on organisations who were successfully supported – for example, how did the Scheme sustain the skills and talent pipeline, support retention of specialist skills and ensure maintenance of supply chains?</li> <li>2. What were the changes in employment between those organisations that participated in the Scheme and those who did not? Were organisations that participated more likely to retain employees than those who did not participate? Did those that participated employ more or fewer employees than those that did not?</li> <li>3. How did the Scheme sustain organisations, and to what extent did that drive local economic growth?</li> <li>4. How successful was the Scheme in supporting all types of production companies (film and TV)? For example:           <ul style="list-style-type: none"> <li>• Did some production companies benefit more than others? (e.g. film vs TV, large production companies vs smaller/independent, those focusing on specific content, mainstream/diverse)</li> <li>• To what extent did the Scheme contribute to organisations’ ability to operate viably and ensure their long term sustainability?</li> </ul> </li> <li>5. How did the increase in fee from 1% to 2.5% impact the success of the Scheme?           <ul style="list-style-type: none"> <li>• Did it prevent any productions from going ahead?</li> <li>• Did productions proceed without support from the Scheme as a result of this fee increase and take on the risk burden themselves?</li> <li>• Were there regional or other disparities in the impact of this fee increase?</li> </ul> </li> <li>6. How did the Scheme impact on other organisations in the value chain, including public service broadcasting (PSB) channels, commercial broadcasters etc.?</li> <li>7. What impact did the Scheme have on enabling broadcasters to maintain UK cultural interest in their schedules and to contribute to fewer repeats or acquired programmes in primetime schedules?</li> <li>8. What impact did the Scheme have on promoting diversity and inclusion within the screen production sector (e.g. recruitment practices and remuneration)?</li> </ol>
Economic and policy impacts	<ol style="list-style-type: none"> <li>9. To what extent did the Scheme have a positive impact on producers’ and production companies’ business confidence and how did any increase in business confidence impact the sector economically?</li> <li>10. What impact (direct, indirect and induced effects) did the Scheme have on the economy?</li> <li>11. What were the savings to the Government with regards to jobs supported against those that would have been lost?           <ul style="list-style-type: none"> <li>• What was the balance between jobs supported or safeguarded in response to the pandemic, against jobs that would have been lost?</li> <li>• What would have been the cost to the Government in the absence of the Scheme, when considered in the context of other Government support schemes, such as the Coronavirus Job Retention Scheme (CJRS).</li> </ul> </li> <li>12. What impact did the Scheme have across the UK nations and regions? How did it contribute to the objectives of the Government’s ‘levelling up’ agenda?</li> </ol>

Theme	Evaluation questions
Inward investment and international benchmarking	13. How did the Scheme reinforce the message that the 'UK is open for business', ensuring the pipeline of inward investment was maintained with the associated outcomes in terms of jobs created and continued development of innovations in the sector? 14. To what extent did the Scheme attract productions filmed in the UK that would have otherwise happened outside the UK without it? 15. To what extent did the speed of delivery and breadth of cover offered by the Scheme impact the sector's ability to continue production relative to other countries with comparable schemes? 16. To what extent is there a demonstrable intellectual property (IP) and or inward investment advantage to a timely and/or well-structured production support scheme? (i.e. in the context of attracting and retaining production activity during the pandemic and ultimately confidence in the UK screen industries).
Value for money	17. With reference to the National Audit Office criteria for assessing value for money, in what ways did the Scheme demonstrate (or not demonstrate) value for money?

## 1.4 Outline of report

The following report details the results of the evaluation research and analysis conducted by Nordicity and Saffery Champness. The report has been organised into the following sections:

**Section 1, Introduction**, provides a description of the Scheme, and the background and terms of reference for the impact evaluation.

**Section 2, Methodology**, summarises the research and analytical methods that comprised the evaluation methodology, including the Scheme logic model. Additional details related to the methodology are contained in the appendices.

**Section 3, Evaluation research and analysis**, presents all the evaluation research and analysis. It has been organised to accord with the logic model for the Scheme. In particular, it assesses the performance of the Scheme in relation to the various KPIs developed in accordance with the logic model. Section 3 has been divided into sub-sections addressing each of the key elements of the logic model, including the project inputs, activities and outputs, and outcomes and impacts. A further discussion of the logic model and these key elements can be found in Section 2.

**Section 4, Conclusions and recommendations**, summarises the key findings and conclusions from the evaluation research and analysis and offers recommendations for the Government for similar types of intervention in the future.

## 2. Methodology

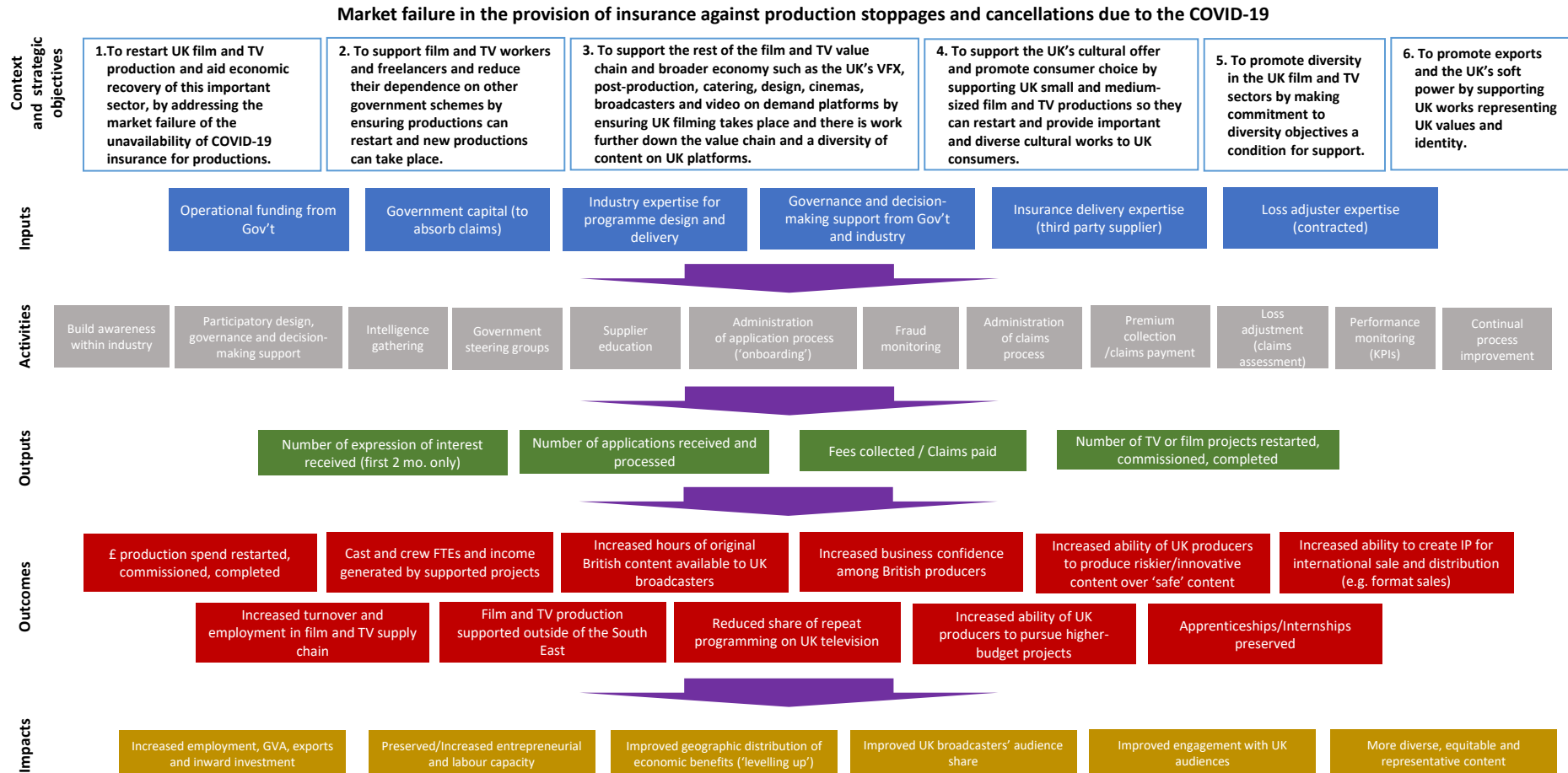
The impact and economic evaluation of the Scheme was based on a combination of desk research and data compilation, online surveys, research interviews, economic impact modelling and case studies.

Prior to undertaking the evaluation research and analysis, an evaluation framework was developed in the early phase of the project. All of the evaluation research and analysis adhered to this evaluation framework. Among other things, the evaluation framework included a logic model for the Scheme and a data plan for all the KPIs identified to assess project performance in relation to the logic model. The logic model can be found in Section 2.1.

### 2.1 Logic model

At the outset of the project, a logic model for the Scheme was developed in collaboration with the DCMS Oversight Team and BFI. The logic model is presented in Figure 2 and is organised into the following key elements:

- **Inputs:** The funding, human resources and expertise used to deliver the Scheme.
- **Activities:** The various activities carried out by DCMS, BFI and Marsh Commercial to deliver the Scheme and generate Scheme outputs, outcomes and impacts.
- **Outputs:** The various products or services that the Scheme generated for Scheme beneficiaries (i.e. registered production companies).
- **Outcomes:** The results of the Scheme experienced by beneficiaries (i.e. production companies), by other organisations within the film and TV production industry, within the film and TV supply chain or across the wider audiovisual sector.
- **Impacts:** The wider economic and social impacts that followed from the film and TV production, and employment stimulated by the Scheme.

**Figure 2 Logic model for Film and TV Production Restart Scheme**


## 2.2 Desk research and data compilation

The desk research and data compilation formed the basis for the quantitative analysis of the impact of the Scheme. It focused on the Scheme data provided by Marsh Commercial. This Scheme data included production-by-production information on the budgets, type of production, filming locations and number of cast and crew involved in each production. This data was used to measure the Scheme outputs, outcomes and impacts. In particular, it permitted analysis of the economic impact of the Scheme, and an analysis of its impact in each nation and English region.

Additional data was supplied by the BFI which indicated the month-to-month take up of the Scheme and the market share of the Scheme – that is the proportion of overall production activity accounted for by the Scheme.

## 2.3 Research interviews

To complement the quantitative analysis of impact, the evaluation team also conducted research interviews. These interviews provided valuable insights into the market and business conditions facing the production industry at various points before the launch of the Scheme and during its operation. The interviews also gathered insights into producers' and broadcasters' decision-making processes during the pandemic and also allowed them to directly comment on the causal relationships between the Scheme and their own production and business activity or what they observed across the industry.

A total of 32 producers and other stakeholders were interviewed. This included 10 producers that made Scheme-registered productions (but may have also made productions outside of the Scheme); one producer of a television programme that was eligible for the Scheme, but did not apply to the Scheme; two industry bodies; three broadcasters; five organisations that finance film and TV production; three representatives from the insurance industry, including loss adjusters; and eight members of the Steering Board. In addition, a research roundtable was held with seven current and past members of the DCMS Oversight Team.

<b>10</b> producers (Scheme registrants)	<b>5</b> film/TV financiers
<b>1</b> producer (eligible but did not apply)	<b>3</b> insurance industry representatives
<b>2</b> industry bodies	<b>8</b> Scheme Steering Board members
<b>3</b> broadcasters	

A detailed list of interviews can be found in Appendix B. A copy of the interview guides used for the different types of stakeholders can be found in Appendix C.

## 2.4 Online survey of producers

Whilst the desk research and data compilation focused on Scheme data, specifically production expenditure and job creation, the online survey of producers permitted the evaluation team to investigate a wider set of Scheme impacts and further investigate the causal relationship between the Scheme and those wider impacts.

The online survey focused on production companies that registered for the Scheme. The evaluation team also attempted to recruit production companies that did not participate in the Scheme, however, the sample of survey respondents ultimately consisted of companies that registered for the Scheme.

The online survey was distributed to c. 450 production companies that registered for the Scheme. The online survey was also promoted by Pact and the BFI through its email newsletters, which were distributed to production companies that both participated and did not participate in the Scheme. The evaluation team



initially aimed to obtain at least 160 survey responses so that the survey results would be subject to a sampling error of +/- 5 percentage points, 18 times out of 20 (i.e. 90% confidence interval).<sup>17</sup>

The survey was open in November and December 2022. Despite repeated attempts to engage and raise the survey response rate, the survey was closed in early January 2023 with a total of 71 respondents. In other words, 1 out of every 6 production companies that participated in the Scheme responded to the survey. This rate of response corresponds with a sampling error of +/- 9 percentage points, 18 times out of 20. In other words, if 75% of survey respondents selected a particular answer or choice on the survey, then there would be a 90% probability that the actual share across the entire population of production companies could be between 66% and 84%.

A copy of the survey questionnaire can be found in Appendix D.

## 2.5 Economic impact modelling

The evaluation also included economic impact modelling, which was used to estimate the direct, indirect and induced impact on employment and GVA generated by the film and TV production supported by the Scheme (see Box 1 for definitions). To complete this economic modelling, the evaluation team sourced economic impact intensity ratios (i.e. employment per £1 million production spending<sup>18</sup>, GVA per £1 million production spending) from the BFI report, [Screen Business 2021: How screen sector tax reliefs power economic growth across the UK 2017–2019](#). The economic impact ratios can be found in Table 2 (and Appendix E).

Whilst the GVA ratios were held constant from 2019, the employment impact ratios published in Screen Business were adjusted to take into account wage cost inflation in 2020 and 2021.<sup>19</sup> While this report ended with production activity in 2019, the evaluation team obtained wage price inflation data from the Office for National Statistics (ONS) in order to adjust the employment impact ratios, so they could be applied to the 2020-2022 period covered by the Scheme. The GVA impact ratios were unaffected by wage price inflation and so were not adjusted. The adjusted economic impact ratios can also be found in Appendix E.

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<sup>17</sup> A confidence interval is a measure of the degree to which an estimate derived from a sample is likely to be representative of the actual value observed within the population. A wider confidence interval indicates that the sample-based estimate is less accurate or less representative of the actual population figure. In other words, if 75% of survey respondents selected a particular answer or choice on the survey, then there would be a 90% probability that the actual share across the entire population of production companies would be between 70% and 80%.

<sup>18</sup> Within the film and TV production industry, 'production spending' is akin to turnover, so the economic impact ratios also indicate the level of employment and GVA generated for each £1 million of turnover.

<sup>19</sup> Since the GVA impact ratios have been held constant since 2019, they may not necessarily reflect long-term changes to the UK economy during the pandemic. For that reason, they should be viewed as approximations of the economic impact in 2020 and 2021.

**Table 2 Economic impact ratios**

	BFI Screen Business				Modelled <sup>1</sup>	
	2016	2017	2018	2019	2020	2021-2022
<b>Employment (FTEs per £1m spend)</b>						
Direct	11.9	11.7	11.2	11.4	10.4	10.3
Indirect	7.5	7.5	7.0	7.1	7.1	6.9
Induced	4.8	4.8	4.5	4.6	4.6	4.5
<b>Total</b>	<b>24.3</b>	<b>23.9</b>	<b>22.8</b>	<b>23.1</b>	<b>22.0</b>	<b>21.6</b>
<b>GVA (£m per £1m spend)</b>						
Direct	0.53	0.52	0.52	0.51	0.51	0.51
Indirect	0.32	0.32	0.31	0.29	0.29	0.29
Induced	0.21	0.21	0.21	0.20	0.20	0.20
<b>Total</b>	<b>1.06</b>	<b>1.06</b>	<b>1.04</b>	<b>1.01</b>	<b>1.01</b>	<b>1.01</b>

Source: Nordicity / Saffery Champness calculations based on data from BFI (2021) *Screen Business*

Notes:

1. Employment impact ratios have been adjusted by wage-cost inflation for 2020 and 2021, which reflects the economic conditions during the pandemic. The GVA impact ratios, however, were held constant since 2019. For that reason they may not necessarily reflect long-term changes to the UK economy during the pandemic, and, therefore, they should be viewed as approximations of the economic impact in 2020 and 2021.

### Box 1 Types of economic impact

**Direct economic impact** refers to the employment and GVA generated directly within the film and TV production industry.

**Indirect economic impact** refers to the increased employment and GVA experienced by supplier businesses when film and TV producers purchase supplies and services from other industries (e.g. equipment hire, security services, hotels, catering, timber).

**Induced economic impact** refers to the increased employment and GVA experienced within the UK economy, when workers employed on account of the direct and indirect impacts spend their earnings within the UK economy (e.g. purchases of household goods).

## 2.6 Case studies

To complement the data analysis and to provide further ‘theory of change’ evidence of the impact of the Scheme, the evaluation team prepared six case studies. A list of the case study subjects can be found below.<sup>20</sup> To complete these case studies, the evaluation team interviewed the producers of each project or other relevant stakeholder as well as desk research related to the production.

**Table 3 List of case studies**

	<i>Breeders season 2</i>	<i>Phantom of the Open</i>	<i>Unwelcome (aka The Little People)</i>	<i>I'm a Celebrity, Get Me Out of Here!</i>	<i>Molinare</i>	<i>Hamish Doyne-Ditmas Director of Photography</i>
A TV project that was quickly restarted due to the Scheme	✓					
An independent film that was able to start filming due to the Scheme		✓				
A production company that was able to ‘rescue’ its business and develop and start new projects due to the Scheme			✓			
A project that made a sizable Scheme claim			✓			
A sizable UK domestic project that went ahead without the Scheme (through self-insuring or other means)				✓		
Ancillary companies that were able to carry on due to the Scheme (e.g. post production houses, equipment rental facilities, caterers etc.)					✓	
Productions that relocated / shifted production elements to the UK to take advantage of the Scheme?			✓			
Cast / crew that were able to work during lockdown						✓

<sup>20</sup> At the outset of the project, the evaluation team proposed to prepare eight separate case studies with a single case study subject drawn from each of the eight subject categories listed in the table. However, because some of the case study subjects met multiple categories, six case studies was sufficient to cover at least one subject from each category.

### 3. Evaluation research and analysis

In the following section, we present the results of our evaluation research and analysis. The section is organised in accordance with the key elements of the logic model, beginning with the project inputs, followed by the project activities and outputs, project outcomes and impacts.

#### 3.1 Inputs

The evaluation team identified seven key Scheme inputs listed and assessed in Table 4.

**Table 4 Summary of Scheme inputs**

Input	Research/Analysis
Operational funding from Government (£m funding)	According to DCMS, the Scheme's delivery costs are expected to total £5.7 million. This includes administrative payments to the Scheme's suppliers, including Marsh Commercial, as well as the costs of internal Government resources devoted to the Scheme. The Scheme also incurred maximum expected claims of £49.5 million (at the time of writing).
Scheme registration fees	The Scheme collected £35.6 million in fees from producers (net amounts contractually retained by Marsh Commercial). These collected fees could therefore offset a portion of the expected claims, thereby yielding a net claims amount of £13 million to be paid by the Government.
Government capital (to absorb claims) (£m capital reserve)	At the outset of the Scheme, the Government announced that it would commit to paying up to £500 million in claims. This amount was not ringfenced or set aside by the Government but took the form of a public commitment. Scheme claims totalled no more than £49.5 million, which were less than one-tenth of the public commitment.
Industry expertise for programme design and delivery	The design of the Scheme included experts in Government programme design (e.g. DCMS, PwC), the film and TV production industry (e.g. BFI and Pact), Government finance (e.g. HM Treasury, Bank of England), and the insurance industry (e.g. Association of British Insurers, Lloyd's of London).
Governance and decision-making support from Government and industry	<p>A Scheme Steering Board comprising experts from the insurance sector, film and TV production sector and across Government. The Steering Board provided high-level monitoring of the Scheme delivery and performance against KPIs, and review and decision-making in relation to escalated claims and disputes.</p> <p>The DCMS Oversight Team provided day-to-day management of the Scheme's suppliers including Marsh Commercial. Among other things, it reviewed applications and claims escalated by Marsh Commercial, and determined if they should be further escalated to the Steering Board.</p>
Insurance delivery expertise (third party supplier)	<p>The Government appointed Marsh Commercial to administer the Scheme.</p> <p>Marsh Commercial is one of the UK's leading commercial-insurance brokers with a local branch network across the UK and a contact centre located in the West Midlands that could handle the volume of enquiries expected from the film and TV production community.</p> <p>Marsh Commercial managed the communication and interaction with producers seeking to register with the Scheme. Marsh Commercial designed the application process and claims process. It received, validated and approved Scheme applications, and collected fees.</p> <p>Marsh was also the first point of contact for all claims. It would validate and approve certain claims, and distribute funds, subject to its approval threshold. Where required, it would outsource claims assessments to two sub-contracted loss adjusters. Where claims exceeded its approval threshold, Marsh Commercial would escalate to the DCMS Oversight Team and Steering Board.</p>

Input	Research/Analysis
Loss adjuster expertise (contracted)	<p>Marsh Commercial selected Spotlight Claims Ltd and Sedgwick International as the Scheme's loss adjusters. Where required, Marsh Commercial sub-contracted these loss adjusters to investigate and assess claims.</p> <p>Both Spotlight Claims Ltd and Sedgwick International have significant experience within the film and TV production industry, and the evaluation research indicated that producers took comfort in the fact that this industry experience was applied to their claims.</p>

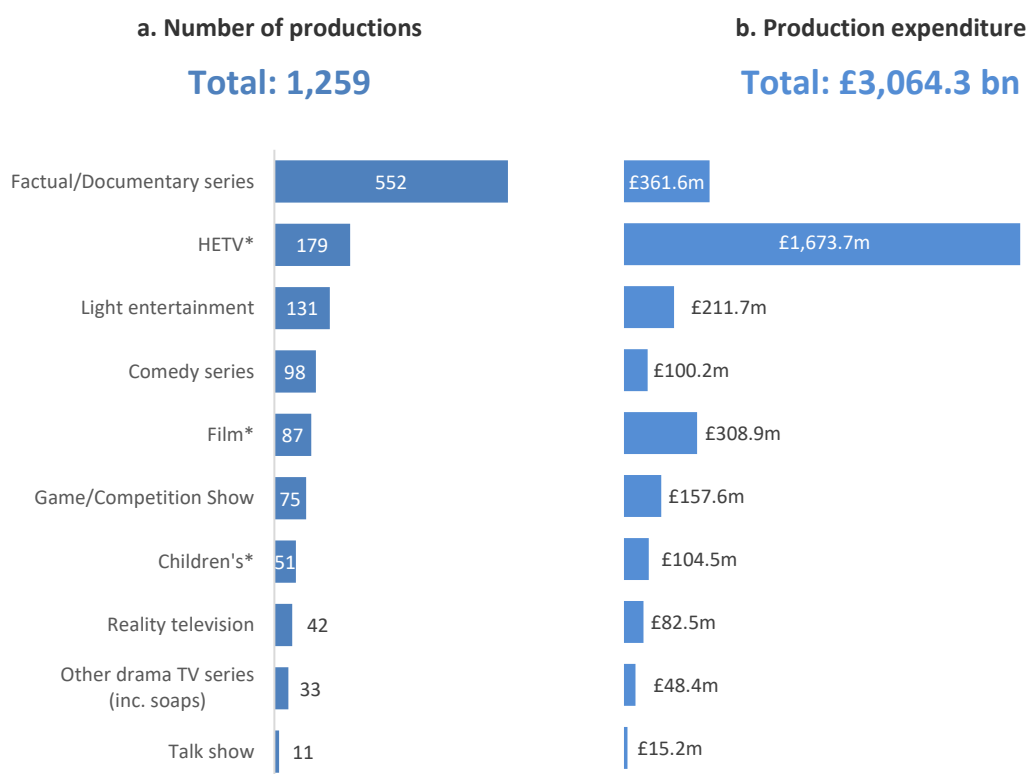
## 3.2 Activities and outputs

### 3.2.1 Scheme uptake and level of supported production

The Scheme supported a total of 1,259 productions with budgets totalling over £3.06 billion (Figure 3). Nearly half of the projects (552, 44%) were television series in the factual/documentary genre. In monetary terms, however, the Scheme's highest value (and share) of production was in HETV. This type of production accounted for 179 productions and over £1.67 billion in production budgets or 55% of total budgets supported by the Scheme.

The relatively higher number and value of Scheme-registered productions observed in the factual/documentary and HETV genres, respectively, are not surprising given that these were the two key genres driving television viewing in the early stages of the pandemic. Indeed, producers noted that HETV production was often at higher risk of stoppage and delay than factual/documentary programming because it involves large crews and key performing talent; however, the demand for this type of content was extremely high among SVODs seeking to attract subscribers with serial programming. PSBs were also keen to fill their schedules with original content so as to avoid losing audiences.

**Figure 3 Production registered for the Film and TV Restart Scheme**



Source: Marsh Commercial and BFI

\* Tax relief eligible

” The Scheme in my opinion was essential in getting large parts of the production sector up and running - particularly in respect of drama production  
 - TV producer

” The Scheme was incredibly helpful, particularly for higher budget / higher risk productions. The confidence that we had cover in place in the event of COVID cancellation / stand down especially on high day-cost show[s] was very reassuring.  
 - Game show producer

The importance of the Scheme for different types of production can be further ascertained by examining its share of overall production activity. According to an analysis prepared by the BFI, Scheme-registered productions accounted for approximately 40% of total film and TV productions filmed in the UK between October 2020 and June 2022 (Table 5).<sup>21</sup>

- The relative importance of the Scheme was highest for **HETV** production, where it accounted for 74% of Scheme-eligible production and 52% of all HETV productions filmed in the UK (i.e. inclusive of inward investment HETV production).<sup>22</sup> So both in absolute terms and in terms of share, the Scheme was very important to HETV production in the UK.
- With regards to **film** production, the Scheme accounted for 36% of Scheme-eligible productions and 29% of all film productions in the UK.
- Among the **non-tax-relief** (NTR<sup>23</sup>) genres, including factual/documentary, the Scheme accounted for an estimated 42% of all NTR productions filmed in the UK between October 2020 and June 2022. It is important to note however that this share may be overstated given that BFI does not hold comprehensive data on all NTR production in the UK.

## Box 2 Case study - *Breeders* Season 2

### ***Breeders* Season 2 - A TV project that was quickly restarted due to the Scheme**

The 10-episode second season of the comedy drama, *Breeders*, starring Martin Freeman and Daisy Haggard, was filmed under the strict COVID-19 guidelines in late 2020. The first season had aired in spring 2020 on Sky as the pandemic took hold in the UK but as one of the early productions that Avalon re-started the second season was broadcast a year later in spring 2021.

As a private company, Avalon felt able to mitigate some of the risk of COVID-19 and started to develop *Breeders* season 2 before the Scheme was set up. As a result, once the Scheme was launched, the producers were well-placed to quickly start filming of the new season. Up until this point, the production kept gradually being pushed back and rescheduled by COVID-19.

Having the Scheme provided a “breath of fresh air, knowing something was in place”, and it provided the critical additional assurance that Avalon needed for physical production to begin. During the ensuing period Avalon had a slate of approximately 10 productions on the go and were able to work out how best to mitigate the COVID-19 risks.

<sup>21</sup> This share calculation excludes animation and children’s (live action) productions.

<sup>22</sup> The BFI holds comprehensive market data for both HETV and film production in the UK because it administers both the HETV and film tax relief certification services on behalf of the Government and therefore processes production activity data for official statistics purposes.

<sup>23</sup> NTR – Non-tax-relief genres category largely consists of factual/documentary, light entertainment, comedy series, game/competition shows, reality television, other television drama series (incl. soaps) and talk shows, but will also include films and HETV productions that do not qualify for tax relief. Due to the lack of comprehensive data available to the BFI, the figures for the total number of productions, and thereby the percentage share accounted for by Scheme-registered productions, are both estimates.

The evaluation research, particularly interviews with film producers and film financiers, suggested that the Scheme was vital to the independent film production sector. With cinemas closed and SVODs focused on commissioning and acquiring serial programming, independent film producers faced a challenging market environment. What is more, work stoppages due to COVID-19 could arguably have a much more serious effect on films than on television because films often have shorter filming schedules and only fixed and limited availability of directors and key performers. As one interviewee described, “stop dates are much less putative [on TV production] than for films”.

Despite the higher risks facing independent film production, out of the 281 independent films shot in the UK between October 2020 and June 2022, Scheme-registered productions accounted for only 29% of all films shot in the UK (inclusive of inward investment films) and, crucially, 36% of films eligible for the Scheme (i.e. excluding inward investment films).

**Table 5 Film and TV production registered for the Film and TV Restart Scheme as a share of total production activity in the UK (Oct 2020 to Jun 2022)**

	No. of Scheme-registered productions	No. of Scheme-eligible productions <sup>1</sup>	Scheme-registered productions' share of Scheme-eligible production	Total no. of productions filmed in the UK	Scheme-registered productions' share of total no. of productions filmed in the UK
HETV	164	221	74%	313	52%
Film	81	224	36%	281	29%
NTR <sup>2</sup>	922	--	--	2,355 <sup>3</sup>	42%
<b>Total</b>	<b>1,167<sup>4</sup></b>	--	--	<b>2,949</b>	<b>40%</b>

Source: BFI

1. Excludes inward investment projects and other projects ineligible for Film and TV Restart Scheme.

2. NTR – Non-tax-relief genres including factual/documentary, light entertainment, comedy series, game/competition shows, reality television, other television drama series (incl. soaps), and talk shows.

3. Figure is an estimate, given the lack of comprehensive data.

4. Total excludes animation and children's (live action) television productions, and therefore, differs from total (1,259 productions) reported in Figure 3.

Looking across all genres of production, the tremendous uptake of the Scheme among HETV producers – both on an absolute and market share basis can be put down to some of the key features of the cover it offered. Among producers, the Scheme's key cast cover was viewed as the most important aspect of the coverage offered by the Scheme. Ninety percent of all surveyed producers agreed that it motivated them to register (Figure 4). A similar overall share felt the level of coverage was adequate to ensure production could continue. However, the share that 'strongly agreed' that the cover was adequate to ensure production could continue (46%) was significantly lower than the share that strongly agreed that it was a motivation (76%). This suggests that producers may have been less satisfied with the cast cover ultimately provided by the Scheme than at the time that they registered for the Scheme. Nevertheless, it is clear that key cast coverage that was fit for purpose was vital to producers of HETV programming because of the characteristics of that programming and thereby helping to restart production in that all-important category.

To a lesser extent, producers were attracted to the Scheme's civil authority cover. Sixty-seven percent of producers agreed that this cover encouraged them to register. Meanwhile, 72% agreed that the level of civil authority cover was adequate to ensure that they could continue production – suggesting that producers were relatively satisfied with the level of cover.

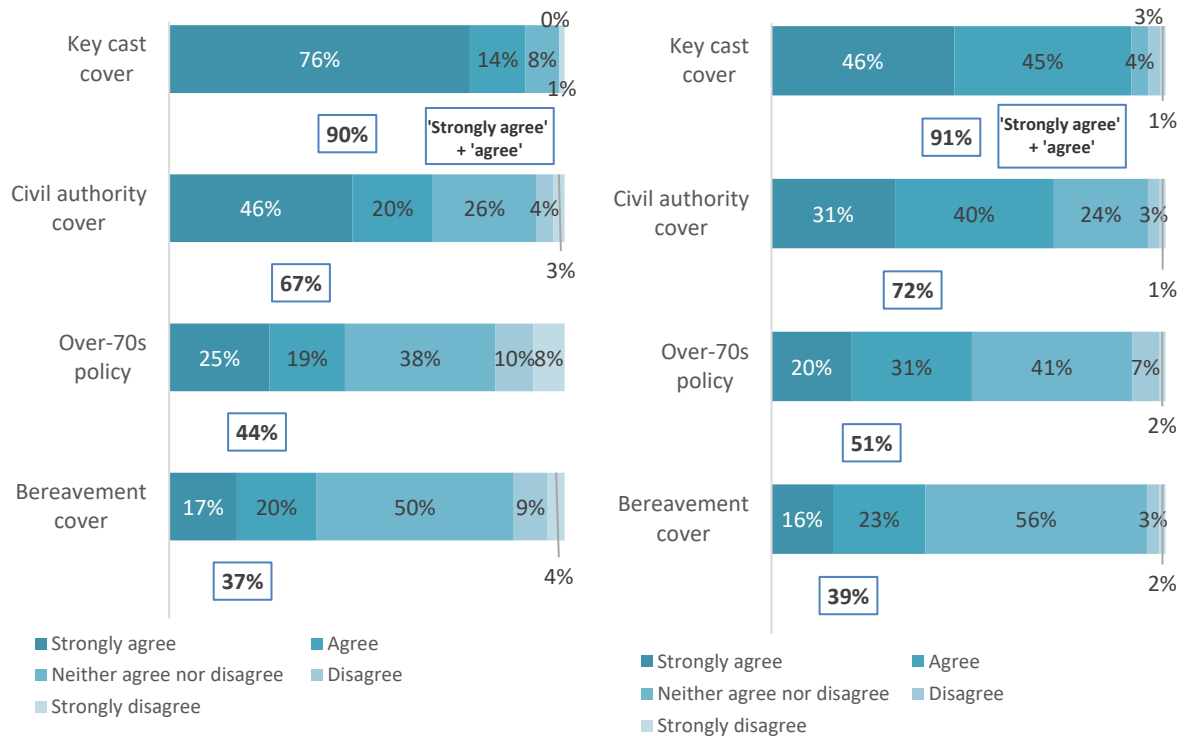
Only a minority of producers viewed the Scheme's over-70s policy and bereavement cover as key motivations in their decision to register for the Scheme. Indeed, some producers noted that in the early stages of the Scheme, the Scheme did not offer cover for directors and performers over the age of 70 in line with insurance

industry practice. It was in December 2020 (two months after it opened for registration) that the Scheme first made this coverage available, for up to two over-70s per production. The Scheme's over-70 coverage was extended in December 2021, allowing productions to name more than two cast/crew over-70 to which compensation would apply. Productions making use of these specific age extensions were required to pay an additional fee.

**Figure 4 Producers' motivations for Film and TV Production Restart Scheme registration**

*To what extent do you agree that the following features of the Scheme encouraged you to register to the Scheme?*

*To what extent do you agree that Scheme coverage levels were adequate to ensure production could continue?*



Source: Producer survey (2022)

n = 71

Note: Some totals may not sum due to rounding.



**Box 3 Case study – *I'm a Celebrity, Get Me Out of Here******I'm a Celebrity, Get Me Out of Here* - A sizable UK domestic TV production that proceeded without the Scheme (through self-insuring or other means)**

The popular ITV Studios' reality series, *I'm a Celebrity, Get Me Out of Here* ("*I'm a Celebrity*"), in 2020 and 2021 were filmed in Gwrych Castle in Abergele, North Wales, rather than its usual tropical Queensland location. As usual, Ant and Dec presented proceedings and celebrities were eliminated via a public vote but nonetheless, the format did have to face radical alterations beyond the location.

The production chose not to register for the Scheme primarily because of the producers' experience of unscripted television under the Scheme. They considered the registration fee too high in relation to the prospect of qualifying for a successful claim. Given that the main risk for *I'm a Celebrity* was the loss of revenue from the cancellation of live episodes rather than the additional costs to the production, the producers decided that the Scheme was not cost-effective as loss of revenue was not covered by the Scheme. This rationale also applied to other live shows such as *Saturday Night Takeaway*. Therefore, the budgeting needed to include an internal contingency pot.

By not participating in the Scheme, *I'm a Celebrity* did not necessitate any changes in production or format per se, although the mitigation and management of COVID-19 on set did nevertheless instigate changes. The additional cost of administering stringent protocols in order to ensure that the programme could be successfully televised throughout its run was substantial and of the order of several hundreds of thousands of pounds. During this period of time, it was very "challenging to produce, as many broadcasters wanted to know what COVID-19 insurance was in place and given commercial insurance options were not out there this was a challenging negotiation".

**3.2.2 Fee regimes**

As noted in Section 1, the Scheme registration fee was initially set at 1% of the supported production budget. However, from 1 November 2021, the fee was increased to 2.5%.

In general, producers noted that the 1% fee regime was very reasonable and was crucial in allowing them to fit the cost of the Scheme into their budget without sacrificing too much of financing devoted to on-screen elements. Producers also noted that on top of the 1% fee, they still faced additional costs to implement COVID-19 protocols and mitigation measures as well as premiums for general production insurance policies (that excluded any coverage of COVID-19 risks) – all of which meant less could be devoted to on-screen elements.

The introduction of the 2.5% fee, however, meant that producers were more likely to face a decision as to whether they could proceed to production without the Scheme. According to producers, by the time the 2.5% fee was introduced in November 2021, they had become much more experienced at mitigating the risks of COVID-19 personnel absences and had already invested in COVID-mitigation infrastructure (e.g. hand sanitiser, signage). Regulations had also changed, so the impact of a single person contracting COVID-19 and the subsequent contact tracing was not as disruptive for productions. For those reasons, producers had less need for Scheme cover, especially at the higher fee rate. Instead, a combination of COVID-19 mitigation measures – and their associated costs – and contingency budget was determined as being more affordable, given the decreasing likelihood of COVID-19 delays.

Part of the reason for raising the fee from 1% to 2.5% was to encourage the commercial market to start to offer products for producers to take up, and balance the needs of the production industry with the need to deliver value for money for taxpayers. Along with the fee increase, DCMS and HM Treasury engaged extensively with representatives within the insurance sector, in order to demonstrate the potential of a commercial product. However, according to DCMS, there was absolutely no appetite among commercial insurance providers to introduce such a product, even if the higher fee rate would have made it easier to economically introduce such a product. Indeed, the evaluation research indicated that no commercial products emerged in the UK on a widespread basis during the 2.5% regime and so producers and commissioning broadcasters had to adopt 'self-insurance' approaches.

This alternative approach was particularly relevant to HETV productions, where high overall production budgets meant that a Scheme fee of 2.5% was quite substantial in absolute monetary terms. HETV productions that did register with the Scheme displayed an average budget of just under £10 million; so a 2.5% fee translated into £250,000 – a substantial amount according to many of the producers interviewed. At the same time, some producers reported that the 2.5% fee was prohibitive for smaller budget projects where spend had to be managed tightly.

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” ...the rise in fee to 2.5% made the cost of cover prohibitive for many of our productions, given budgets had already been impacted by the cost of implementing the risk management measures required to meet industry and Government COVID guidelines

- Factual producer

” On smaller productions where spend had to be tightly managed, the risk to production was not considered significant enough to justify the [2.5%] fee.

- Factual producer

” At 1% we thought the premium was set about right (bearing in mind that a lot was also being spent on COVID safety precautions). [The] 2.5% was very high and two out of our three financiers thought it was not worth paying it. However, the third insisted, so we did.

- HETV producer

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Whilst there was a steep drop in the levels of Scheme uptake following the rate increase,<sup>24</sup> it can be viewed as a positive outcome where productions were able to go ahead in the absence of the scheme. Indeed, the rate increase was, in part, meant to encourage the commercial insurers to enter the COVID-19 coverage market.

The fee increase was also not the only factor behind the drop in uptake. Several producers noted how their experience mitigating and managing COVID-19 on their sets during the 1% fee regime period meant that by the time the Scheme fee was increased they were both capable and confident to mitigate and manage COVID-19 on their projects without putting their productions at significant risk of a major stoppage or even abandonment.

The 1% fee regime accounted for 86% of registrations (1,081 registrations) and an estimated 91% (£2,798.8 million) of total Scheme-registered budgets. Between July 2020 and October 2021, the Scheme supported an average of £186.6 million in production expenditure per month (Table 6). From November 2021, the average fell by over 80% to £33.2 million per month – despite the fact that the UK’s overall film and TV production activity remained robust during that period. In fact, according to statistics published by the BFI, film and HETV production in the first six months of 2022 reached £3.19 billion, which, at the time, was the highest level ever recorded for the first six months of the calendar year.<sup>25</sup>

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<sup>24</sup> Note that 100% of a production’s budget was assigned to the date at which it registered for the Scheme. For that reason, for those productions that registered before 1 November 2021, 100% of their production budgets are assumed to have been spent before 1 November 2021, even if part of those expenditures were actually incurred on 1 November 2021 or later. In fact, producers could register productions for the Scheme on 31 October 2021, even if principal photography started after 31 October 2021.

<sup>25</sup> BFI (2022) [Film and high-end television programme production in the UK: January – June \(H1\) 2022](#). 28 July.

**Table 6 Average monthly Scheme-supported production, 1% fee regime vs. 2.5% regime**

Fee regime	Time period	Scheme registrations	Total production spend (£m)	Months	Average production spend per month (£m)
1% fee regime*	28 July to 31 Oct 2021	1,081	2,798.9	15	186.6
2.5% fee regime*	1 Nov 2021 to 30 Jun 2022	178	265.6	8	33.2
<b>Total</b>		<b>1,259</b>	<b>3,064.3</b>	<b>24</b>	<b>133.2</b>

Source: Nordicity / Saffery Champness estimates based on data from Marsh Commercial

\* Under both fee regimes a producer may have incurred an additional 0.25% fee to obtain over-70s cover.

### 3.3 Additionality

Additionality refers to the degree to which a government intervention results in economic, social or other policy outcomes that would not have occurred in the absence of the intervention. Understanding the additionality of any government intervention is essential to assessing its net impact, including its net economic impact. From a 'de jure' perspective, 100% of the production spending and related economic impact of the Scheme could be considered additional. This is due to the fact that in order to be eligible for registration, the Scheme guidelines required a producer to attest that the registered production would not be able to go ahead without the Scheme.

#### Box 4 Scheme commercial viability criteria

9.1 Each Eligible Production must meet the following requirements (the "Commercial Viability Criteria"):

...

(C) formal notifications from the commissioning broadcaster and/or finance provider(s) (as applicable) evidencing that:

(i) the production was not able to commence or restart (as applicable) as a result of the Eligible Participant's inability to obtain cover for COVID-19 Risks (as described in Rules 9.1(A) and 9.1(B)); or

(ii) the production was able to commence or restart (as applicable) after the Effective Date on the basis of anticipated eligibility for the Scheme; and

Source: DCMS, [Film & TV Production Restart Scheme: scheme rules](#)

Nevertheless, the evaluation research sought to explore the 'de facto' additionality of the Scheme. On the survey, producers registered for the Scheme were asked to self-assess the likelihood (on a scale of 0 to 10) that their production would have proceeded at their full budget level in the absence of the Scheme. The results (summarised in Table 7 and detailed in Table 8) indicate that under the 1% fee regime, 26% of producers' Scheme-registered projects would have gone ahead at the same budget without the Scheme. That is, the deadweight was 26% and the rate of additionality was 74%. Under the 2.5% regime, the deadweight rose to 36% and the rate of additionality declined to 64%. In other words, under the 1% fee regime, 74% of survey respondents reported that their Scheme-registered production expenditure would not have proceeded in the full budget form without the Scheme, declining to 64% under the 2.5% fee regime.<sup>26</sup>

<sup>26</sup> It should be noted that this self-reported deadweight may be subject to some degree of survey-respondent bias. Some survey respondents will have already been aware that, to register for the Scheme, they had to attest to the lack of commercially available COVID-19 cover to permit them to proceed with their production. This may have led survey respondents to understate the likelihood of proceeding without Scheme support. The implication is that the survey-based estimate of deadweight may be understated and the rate of additionality overstated. However, it should also be noted that

The higher rate of deadweight and additionality under the 2.5% fee regime was expected, given that, as discussed earlier, producers found themselves in a better position to proceed with productions without Scheme support.

**Table 7 Scheme deadweight and additionality**

	1% fee regime	2.5% fee regime
Deadweight	26%	36%
<b>Additionality</b>	<b>74%</b>	<b>64%</b>

Source: Nordicity / Saffery Champness analysis based on data from Producers survey (2022)  
 n = 67 (1% fee regime); n = 61 (2.5% fee regime)

The language of the survey question left open the possibility that productions could proceed without the Scheme at a reduced budget level, thereby leading to a higher rate of deadweight. However, the interviews with producers indicated that production decisions were effectively binary. So a production would only obtain Scheme cover (and pay the fee) if it was essential to broadcasters or financiers that the project have COVID-19 coverage in some form in order to proceed to filming.

**Table 8 Calculation of mean likelihood of deadweight**

Likelihood (0-10) that Scheme-registered productions would have gone ahead at same budget level without Scheme support <sup>1</sup> [A]	Share of survey respondents [B]	
	1% fee regime	2.5% fee regime
0	40%	31%
1	6%	5%
2	13%	5%
3	6%	8%
4	1%	0%
5	21%	23%
6	1%	8%
7	1%	11%
8	3%	5%
9	1%	0%
10	4%	3%
<b>Total</b>	<b>100%</b>	<b>100%</b>
<b>Mean likelihood score<sup>2</sup></b>	<b>2.6</b>	<b>3.6</b>
<b>Deadweight (expressed in percentage terms)</b>	<b>26%</b>	<b>36%</b>

Source: Producer survey (2022)  
 n = 67 (1% fee regime); n = 61 (2.5% fee regime)

Note 1:

0 = Would not have proceeded in any form without the Scheme (i.e. 100% additionality)

5 = There is a 50% chance that the projects would have been able to proceed in the full budget form without the Scheme (i.e. uncertain additionality)

10 = Would have proceeded as is even without the Scheme (i.e. 0% additionality)

Note 2:

$$\text{Mean} = \sum_{0 \text{ to } 10} A \times B$$

the nature of Scheme does not permit the application of quasi-experimental empirical methods to analyse Scheme additionality. So, other than assuming 100% additionality in accordance with the Scheme's commercial viability criteria, the survey provides the only empirical approach to assessing the additionality of the Scheme.

**Box 5 Case study - *The Phantom of the Open***
***The Phantom of the Open* - An independent film that was able to start filming due to the Scheme**

The heart-warming sports underdog film based on the true story of Maurice Flitcroft, *The Phantom of the Open*, starring Mark Rylance, was an independent film that was in development when the pandemic struck. It was filmed under COVID-19 guidelines and premiered at the BFI London Film Festival in autumn 2021, before going on general release in March 2022 in the UK.

During the hiatus, the film continued to be developed by the producers (Spartiate Films) and the time was also spent by the producers to secure funding from BBC Film, BFI National Lottery Film Fund and Ingenious Media. However, this funding was contingent on signing up to the Scheme once it had launched. Principal photography started soon after in October 2020.

The Scheme was critical to the production as, according to the producer, “[the producers] wouldn't have been able to have moved out of development without some sort of indemnification”. Indeed, towards the end of the production a claim became necessary. Importantly, the Scheme allowed the production to proceed as had been intended and reinstate workers who had not been working.

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” Without [the] Scheme a lot of shows wouldn't have been made. Smaller companies wouldn't have been trusted by broadcasters or large commissioners ...  
 - HETV producer

” [The] Scheme helped production come back that wouldn't have existed if it hadn't been in place.  
 - Post-production company

” It was essential. Without it we would not have gone ahead.  
 - Children's TV producer

” Without the Restart Scheme, the majority of our productions wouldn't have been able to start/re-start, which would have had huge financial implications for us.  
 - TV producer

” Without it we would have had to stop all production  
 - Factual producer

” Without [the] Scheme, [we] would have shot in Prague or Berlin.  
 - Film and TV financier

” There was a lot more interest in producing in the UK than [in the] US but it's hard to say at this stage whether this will stick, though [new] relationships will have been made in that time [that could persist and bring further economic benefits to the UK in the future].  
 - Film and TV financier

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### 3.4 Direct economic impact

The direct economic impact refers to the increase in employment and GVA within the film and TV production industry, specifically within the production projects themselves. In that regard, it is largely comprised of the crew and cast personnel, and the labour income that they earned by working on Scheme-supported productions.

As part of Scheme registration, productions reported their crew and cast sizes. In total, Scheme-registered projects employed 100,600 crew and cast (measured on a headcount basis), including 63,500 crew and 37,100 cast (including extras) (Table 9).

The crew and cast data collected for Scheme-registered productions does not take into account the duration of employment and potential for duplication across productions (i.e. the same individual crew or cast member working across multiple projects). To address this, the evaluation team further analysed the employment impact of the Scheme in terms of the number of full-time equivalents (FTEs) by applying the direct employment ratios found in *BFI Screen Business 2021*. These ratios can be found in Appendix E.

These employment ratios (after adjusting for wage inflation since 2019, when the ratios were last calculated) indicated the Scheme's £3.06 billion in total production expenditures generated 31,600 FTEs of direct employment – consisting of crew and cast. The economic impact ratios found in *BFI Screen Business 2021* also indicated that £3.06 billion in production expenditure generated £1.57 billion in direct GVA.

- 
- ” [The Scheme] definitely brought people back to work.  
- Film producer
- ” [The] Scheme helped reduce the number of people furloughed.  
- Post-production company
- ” [Did the Scheme preserve workforce] Undoubtedly, so [producers] were able to bring people back from furlough and re-hire freelancers  
- TV producer
- ” It kept producers in work, which kept freelancers in work  
- Broadcaster
- 

As noted in Section 3.3, the survey research indicated that the Scheme displayed an additionality rate of 74% under the 1% fee regime and 64% under the 2.5% fee regime. On a weighted average basis, the rate of additionality across both fee regimes was 73%. The evaluation team applied that additionality rate to the estimate of gross direct economic impact and determined the Scheme generated:

- £2,237.0m in additional production expenditures
- 73,400 of additional crew and cast jobs (headcount basis)
- 23,100 FTEs of additional direct employment
- £1,149.2m in additional direct GVA

**Table 9 Direct economic impact of the Film and TV Production Restart Scheme**

	Gross impact	Net impact (73% <sup>3</sup> )
Production expenditures (£m)	3,064.3	2,237.0
<b>Employment (headcount)</b>		
Crew headcount <sup>1</sup>	63,500	46,400
Cast headcount <sup>1</sup>	37,100	27,100
<b>Total headcount<sup>1</sup></b>	<b>100,600</b>	<b>73,400</b>
<b>Employment (Full-time equivalents (FTEs))<sup>2</sup></b>		
FTEs <sup>2</sup>	31,600	23,100
<b>Gross value added</b>		
GVA (£m) <sup>2</sup>	1,574.2	1,149.2

Source: DCMS, Marsh Commercial and Nordicity / Saffery Champness estimates based on data from BFI and ONS

Some totals may not sum due to rounding

Notes:

1. As reported by producers with no allowance for duplicates of personnel or duration of employment
2. See Appendix E for economic impact ratios derived from BFI *Screen Business 2021*
3. Weighted average based on levels of production expenditure under the 1% fee regime (91%) and 2.5% fee regime (9%).

**Box 6 Case study - Hamish Doyne-Ditmas, Director of Photography**

**Whilst some UK crew and cast were able to find work on Hollywood productions prior to the Scheme, without it, they would not have had the opportunity to continue working on in more senior roles as part of UK productions.**

Hamish Doyne-Ditmas has been working in the British film production sector since 1986, mostly as a freelancer. The period from the first COVID-19 shutdown in March 2020 through to the introduction of COVID-19 secure protocols was the first time he had ever experienced a total lack of work. Everyone working as crew, like the rest of the country, had no idea what the future held and when it would be possible to return to work.

Hamish works as a Director of Photography (DOP) on UK-produced films with budgets in the £10 million range or a Second Unit DOP on Hollywood studio films with budgets of £100 million or higher. In March 2020, he was booked to go to Egypt to do some 'general views' work, but as the time drew close, the producers got increasingly nervous and decided the risk of being stranded abroad on account of COVID-19 lockdowns was too great. For that reason, the shoot was cancelled. A few days later, a lockdown was declared in the UK.

Prior to the introduction of the Scheme, Hamish was able to restart work in late June 2020 on a big-budget Hollywood production, after the COVID-19 film protocols had been introduced. Like many of the Hollywood studio films, this production was able to proceed without the Scheme because the studios either had pre-existing insurance coverage or sufficient financial resources to self-insure against COVID-19 risks. Hamish was only able to start work on UK film productions after the introduction of the Scheme, without which he says "British film production would have been a wasteland".

Even with the Scheme, the COVID-19 mitigations and extra time needed to ensure social distancing placed a significant cost burden on small productions – a burden that big-budget Hollywood productions could absorb more readily. This did mean less work, and even with his mixed slate of Hollywood productions and smaller UK shoots, Hamish estimated operating at 60-70% of his pre-pandemic level of activity during the first half of the Scheme period and at 80% for the latter half.

As a crew member, Hamish was aware of the Scheme but not in any detail about its operation or rules. Nonetheless, he felt there was "no question about the importance of the Scheme" and that it was "a good thing that the Government had introduced it" and for the workforce without it "a lot of people would have been in a lot of trouble".



### 3.5 Supply chain and total economic impact

The economic ratios found in BFI *Screen Business 2021* (see Appendix E) were also used to estimate the indirect (i.e. supply chain) and induced (i.e. wider effects of wage re-spending) economic impacts of the Scheme – on both a gross and net basis.

This approach indicates that the production expenditures supported by the Scheme generated an estimated additional 15,400 FTEs of supply chain employment (Table 10). This would include employment at post-production houses, equipment and prop hire companies, and other businesses that supply materials and services to film and TV producers. Within the supply chain, the Scheme also led to the generation of an additional £650.8m in GVA.

- 
- ” [I’m] not aware of any companies that went under in Northern Ireland, which is [a] small sector, so the Scheme probably was very influential in that.  
 - TV producer
- ” All camera, graphics, post-production in Scotland were very dependent [on the Scheme].  
 - Screen Scotland
- 

After adding in the value of induced impact employment and GVA, the total additional economic impact of the Scheme was estimated to have been equal to 48,500 FTEs of employment and £2,250.3 million in GVA (Table 10).

**Table 10 Total economic impact of the Film and TV Production Restart Scheme**

	Gross impact <sup>1</sup>	Net impact (73% <sup>3</sup> )
Production expenditures (£m)	3,064.3	2,237.0
<b>Employment (FTEs)</b>		
Direct	31,600	23,100
Indirect (supply chain)	21,100	15,400
Induced <sup>2</sup>	13,700	10,000
<b>Total</b>	<b>66,400</b>	<b>48,500</b>
<b>GVA (£m)<sup>2</sup></b>		
Direct	1,574.2	1,149.2
Indirect (supply chain)	891.5	650.8
Induced <sup>2</sup>	616.9	450.3
<b>Total</b>	<b>3,082.6</b>	<b>2,250.3</b>

Source: DCMS, Marsh Commercial and Nordicity / Saffery Champness estimates based on data from BFI and ONS  
 Notes:

- As reported by producers with no allowance for duplicates of personnel or duration of employment.
- See Appendix E for economic impact ratios derived from BFI *Screen Business 2021*.
- Weighted average based on levels of production expenditure under the 1% fee regime (91%) and 2.5% fee regime (9%).

**Box 7 Case study - Molinare****Molinare – A demonstration of how the Scheme generated a positive economic impact through the film and TV production supply chain**

Molinare is one of the UK's leading post-production houses, providing services to the screen sectors, including episodic drama, feature film, feature documentary, episodic factual and video games for 50 years. It is a respected and multi-award-winning company based in Soho.

In line with Government guidelines, Molinare advised all staff to work from home wherever possible at the start of the pandemic. As an organisation, it was already using software for virtual meetings and conferences. For its creative staff, however, the provision of kit for homeworking was a significant cost as well as logistically challenging.

As post-production takes place after principal photography, Molinare was not immediately affected, with projects already in edit stage able to continue through 2020. As the company adjusted to a new way of working, whether hybrid or fully remote, a concept previously unheard of in post-production, clients too got used to the new way of working. Indeed, in an article for Broadcast in March 2020, Nigel Bennett, managing director, said: "We are anticipating a slowdown of work coming through for a few months while productions adapt or re-plan shooting schedules but we are confident we can adapt to the changes and are putting in place processes that will enable us to manage a higher volume of work once things start returning to normal".<sup>27</sup>

As anticipated, there was a dearth of work during winter 2020/21, however when production started ramping up in summer 2021, Molinare experienced its busiest year yet.

Documentaries and factual programming were less affected by the pandemic due to relying more on archive material. Molinare saw an increase in this type of work and it helped the company continue to run, when filming came to a halt across scripted productions. As a result, Molinare output in high-end factual has increased, with work on many of the major documentaries that Netflix and Amazon have developed over this period.

It was necessary for Molinare to move about half of its employees into furlough. Although Molinare could not participate directly in the Scheme, the Scheme did allow screen content to be produced, which fed the supply chain, reducing the number of staff on furlough at Molinare. This situation was further helped by Molinare's multi-genre slate of work, which allowed it to move employees from one genre to another. To conclude, Molinare had a staff of about 150 before the start of the pandemic, but by February 2023, not only had it conserved those numbers but it had increased its payroll to approximately 170 people.

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<sup>27</sup> Bickerton, J. (2020) [Post sector reacts to coronavirus challenges](#). *Broadcast*. 18 March.

### 3.6 Regional impact and levelling up

An analysis of the filming locations data collected by Marsh Commercial indicates that it made a positive contribution to levelling up, given that it not only supported film and TV productions in all regions of the UK, but that the regional distribution of production activity supported by the Scheme was less concentrated in London than predicted by London's historical share of the UK's total film and HETV production activity (in 2019), as reported in *BFI Screen Business 2021*.

Figure 5 provides the evaluation team's estimates of how the total production expenditure supported by the Scheme (£3.06 billion) was distributed across the UK. In cases where a production only reported a single filming location, its entire budget was allocated to that local area. Out of 1,259 supported productions, 1,049 (83%) reported location information. Out of these 1,049 reporting projects, 502 reported more than one filming location. For those 502 multiple-location productions, the total budget was allocated on a pro-rata basis across all filming locations, since there was no data available as to how production expenditure was actually distributed.

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” That stability [from the Scheme] was essential, and I suspect the UK is benefiting from that now as many see the advantages of working in all parts of the UK.

- Screen Scotland

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All the UK nations and each of England's regions hosted production supported by the Scheme. Greater London accounted for the largest single share of Scheme production expenditure (£1,014.6 million, 33.1%). It was followed by the North West (£414.1 million, 13.5%) and the South East (£357.3 million, 11.7%).

Among the nations, Wales recorded the largest share (£287.5 million, 9.4%), followed by Scotland (£163.4 million, 5.3%) and Northern Ireland (£107.8 million, 3.5%).

England accounted for 81.8% of Scheme production expenditure (£2.51bn) The smallest levels of Scheme production activity were recorded in the East Midlands (£76.8 million, 2.5%), the West Midlands (£63.1 million, 2.1%) and the North East (£40.5 million, 2.1%).

In order to compare the regional distribution of Scheme-supported production to the latest regional statistics published by the BFI, we have also estimated the amount of production within the Metro London<sup>28</sup> region. Metro London hosted £1.28 billion in Scheme production, or 41.8% of the total. When viewed on a Metro-London basis, the South East's share of Scheme production drops from 11.7% to 6.1%; the East of England's share of Scheme production drops from 4.9% to 1.6%.

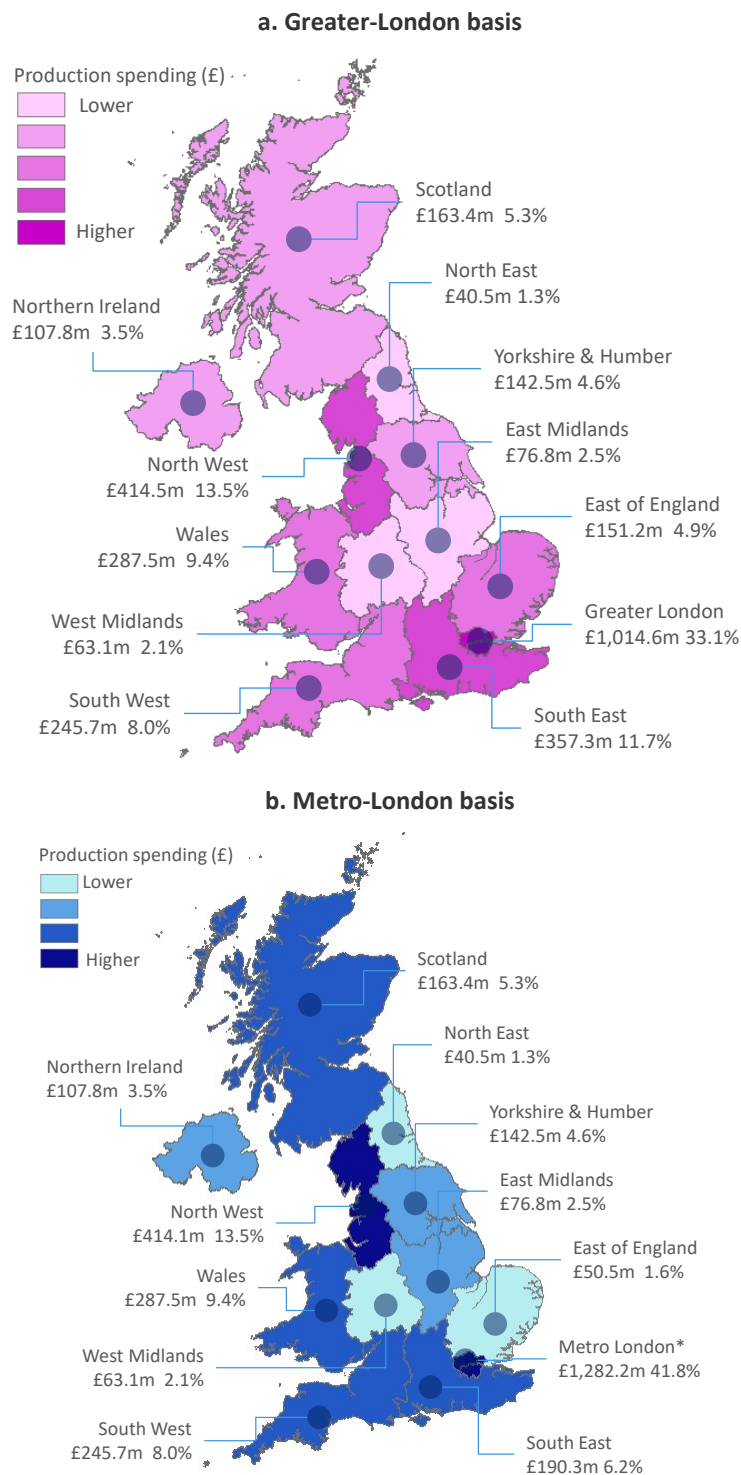
The share of Scheme-supported film and TV production outside of London was equal to 67% of total Scheme production (Figure 6). This was higher than the share of UK GVA outside of London (61%).<sup>29</sup> Nations and regions outside of Metro London accounted for 58% of total Scheme-registered production, which was over 1.5 times the nations and regions' 35% share of film and HETV production expenditure in 2019 (the last year for which the BFI published regional production data).<sup>30</sup>

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<sup>28</sup> As per *BFI Screen Business 2021*, Metro London is defined as Greater London plus Hertfordshire (part of East of England), Buckinghamshire (part of the South East) and Surrey (part of the South East). These three counties are outside of Greater London, but do border on Greater London and, given that they have significant film studio facilities, have historically hosted high levels of film and TV production.

<sup>29</sup> ONS (2022) [Regional gross value added \(balanced\) by industry: all ITL regions](#). May.

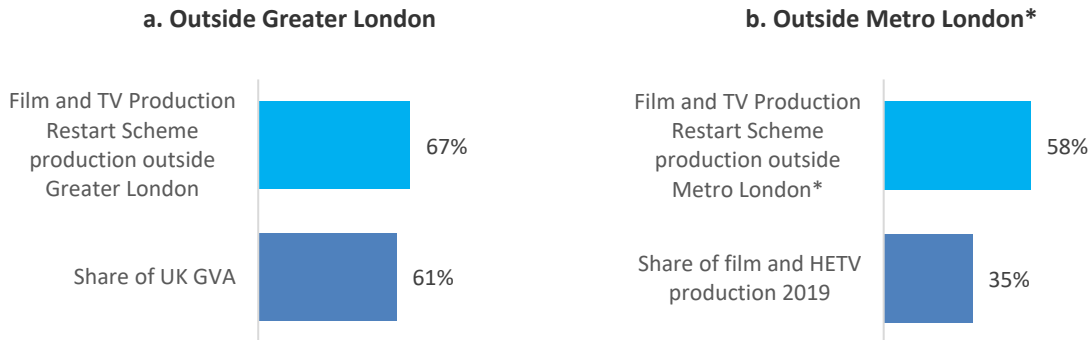
<sup>30</sup> BFI (2021) [Screen Business: How screen sector tax reliefs power economic growth across the UK 2017-2019](#). P. 154 and 158.

**Figure 5 Regional distribution of Film and TV Production Restart Scheme production expenditure**


Source: Nordicity / Saffery Champness analysis based on data from Marsh Commercial

Note: Figures are estimates only based on filming locations data submitted by Scheme-registered productions. Estimates exclude data for projects that did not submit any filming locations information, and are therefore based on an 83% sample of all Scheme-registered projects. Where a production reported more than one filming location, the total production expenditure has been pro-rated equally across all reported filming locations. Where a production did not submit filming location data, the project was excluded from the calculation of regional shares.

\* Metro London includes Greater London, Surrey, Buckinghamshire and Hertfordshire.

**Figure 6 Nations and regions share**


Source: Nordicity / Saffery Champness calculations based on data from Marsh Commercial, ONS (2022) and BFI (2021)  
 \* Metro London includes Greater London, Surrey, Buckinghamshire and Hertfordshire.

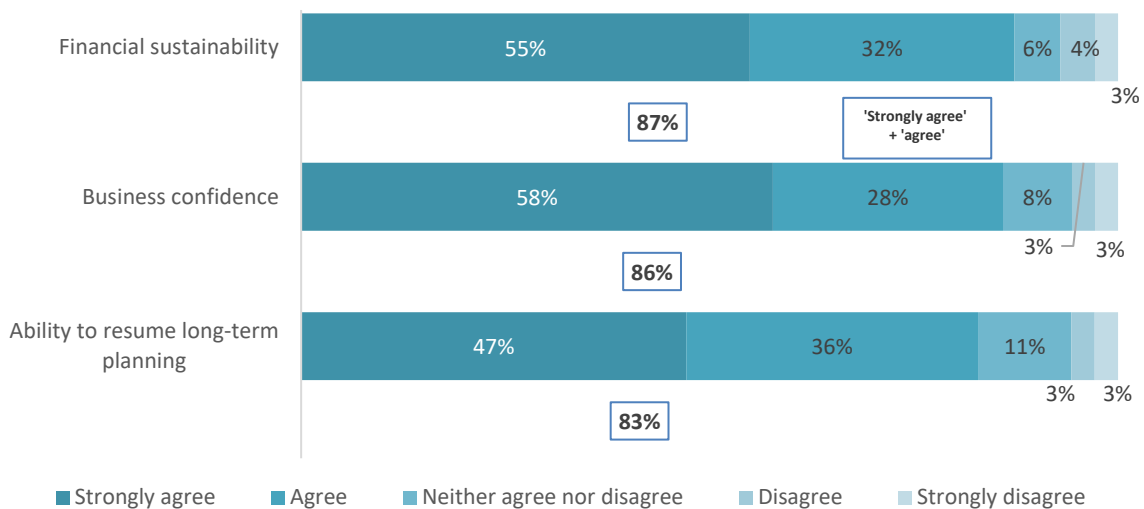
### 3.7 Business confidence

RSM Consulting’s process evaluation initially uncovered the strong link between the Scheme and the rebuilding of business confidence within the film and TV production industry – beyond simply facilitating the restarting or starting of production projects. This impact evaluation’s own research confirmed this link. The vast majority of producers (86%) agreed that the Scheme had a positive impact on their business confidence (Figure 7). Indeed, over half of producers (58%) strongly agreed that there was a positive link between the Scheme and their business confidence.

The concept of business confidence can be very difficult to define. Financial sustainability and, specifically, the ability of entrepreneurs and businesses to engage in long-term planning, rather than simply working project to project, can be viewed as aspects of business confidence. To further test the relationship between the Scheme and business confidence, the evaluation team also asked producers about the impact that the Scheme had on their financial sustainability and ability to resume long-term planning. Again, over 80% agreed that the Scheme had a positive impact on these aspects of business confidence; approximately 50% ‘strongly agreed’ that there was a positive impact on these aspects of business confidence.

**Figure 7 Film and TV Production Restart Scheme impact on risk-taking, innovation and higher budgets**

*The Scheme had a positive impact on my company’s...*



Source: Producer survey (2022)  
 n = 71

- 
- ” The Scheme made it possible to make a film during the pandemic, which kept our company alive.  
- Film producer
- ” Without adequate insurance to cover the risks of filming during the pandemic it's unlikely the company would have been able to survive.  
- TV producer
- ” It served to give us, and the broadcasters, the confidence not only to start filming, but also gave confidence to cast and crew to come back to work; that they and their families would be protected.  
- TV fiction producer
- ” [The] Scheme helped profoundly. [It] gave confidence when starting production.  
- TV producer
- ” Really, really positive impact on confidence.  
- HETV producer
- ” [The Scheme] was essential, as it gave confidence to investors...[and] coupled with the film/TV sector being excluded from lockdowns, gave UK producers excellent leverage to attract productions to film in the UK during this time.  
- Screen Scotland
- ” There is absolutely no doubt that a sizeable proportion of film and TV production in the UK was only able to return because of the Government's Scheme. The majority of companies would not have been able to take the risk of uninsured losses which would have left the industry and thousands of jobs at a standstill.  
- HETV producer
- ” [The] Scheme gave confidence to press [the] go button.  
- Film and TV financier
- ” [The Scheme] provided reassurance to the industry and reduced some of the financial burden.  
- Broadcaster
-

### 3.8 Risk-taking, innovation and higher budgets

The ability to take risks in business and to engage in innovation is vital for many businesses' ability to build long-term competitiveness. The same is true of creative businesses such as film and TV production companies. While many production companies can be successful by creating content in tried and tested formats and genres or working with established creative talent, most have to develop innovative forms of content or storylines, or work with new talent, in order to engage audiences on a continual basis.

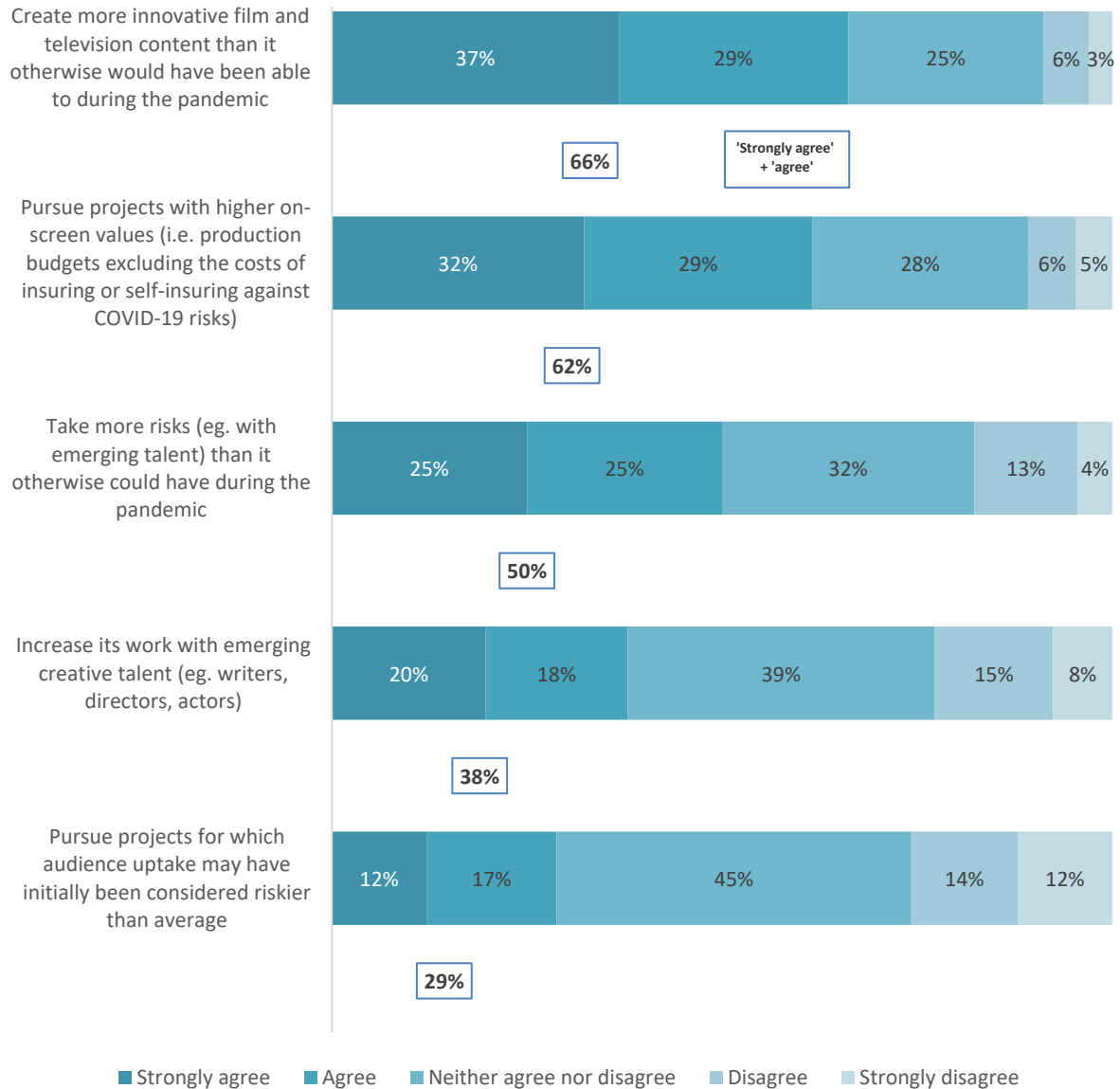
Indeed, increased business confidence should in many respects help foster risk-taking and innovation. If production companies have confidence in their financial future, then they can pursue less-certain lines of business or creativity. That being said, the evaluation research indicated that the Scheme's impact on risk-taking and innovation was not definitive. In fact, it was very mixed.

The implication may be that without the Scheme, those UK producers that did find ways to produce content during the pandemic may have opted to focus on genres or formats with more predictable audience or sales potential than to take a risk on new forms of audiovisual content. Two-thirds of producers did report that the Scheme permitted them to create more innovative film and TV content than they otherwise would have during the pandemic (Figure 8). However, when asked directly about whether the Scheme did encourage them to pursue projects with less certain audience take-up, a minority of producers (29%) reported that it did.

Approximately half of producers agreed that the Scheme allowed them to take more risks during the pandemic. The fact that 38% of producers reported that the Scheme allowed them to increase their work with emerging talent suggests that, while the Scheme helped producers resume their work with established creative talent, only a minority of producers saw the Scheme as a vehicle to allow them to work with emerging talent.

**Figure 8 Impact of the Film and TV Production Restart Scheme on risk-taking, innovation and higher budgets**

*The Scheme had a positive impact on my company's ability to...*



Source: Producer survey (2022)  
 n = 71



### 3.9 Intellectual property creation and international sales

International sales play an important role in the UK’s television ecosystem. According to Pact, in 2020/21 (i.e. during the early stages of the pandemic) the UK’s television export sales declined at a year-over-year rate of 3% to £1.43 billion.<sup>31</sup> In 2021/22, however, UK TV export sales actually rebounded by 7% to over £1.52 billion, which was even higher than the pre-pandemic peak of £1.48 billion recorded in 2019/20.<sup>32</sup>

The most immediate economic impact from film and TV production comes from the actual production of the film and TV content – and the employment and GVA generated by that production. However, over the long-term, the development of financially sustainable production businesses – and thereby a healthy production community – comes from the creation of intellectual property (IP) that can yield economic benefits into the future as well as the international sales of content. Indeed, the creation and subsequent monetisation of IP and international sales of content are substantively additional from an economic perspective because they bring monetary benefits into production companies and the UK economy, without further Government intervention.

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” Sales and distribution did well because of the dearth of material during COVID.

- TV producer

” 2021 sales would not have been as good without [the] Scheme, because the content would not have been there.

- Broadcaster

” [There was a] significant drop off [in production] initially. But because of the Scheme, films were able to achieve good pre-sales because there was less content. [Sales were also] less piecemeal (i.e. country-by-country), with more global distribution.

- Film and TV financier

” The extra production that [the] Scheme provided did help increase sales

- Film and TV financier

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For approximately half of production companies responding to the survey, the Scheme played a positive role in both helping them create content that could be sold and distributed outside the UK, and helping them increase the geographic diversification of their revenue base, by increasing the share of total turnover from outside the UK (Figure 9).

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<sup>31</sup> 3Vision (2022) [UK TV Exports Report 2021-22](#). November. P. 3.

<sup>32</sup> 3Vision (2022) P. 3.

**Box 8 Case study – Unwelcome (aka The Little People)****Unwelcome– An independent film that shifted production to the UK and also achieved international sales with the support of the Scheme**

Piers Tempest is a UK-based producer of independent films with budgets in the £4 million to £25 million range. He uses a financial model based on foreign pre-sales, so when the COVID-19 pandemic started, his business model was struck down, as there were no financiers prepared to take a risk without any insurance. Even when COVID-19 health and safety measures had been introduced into the UK's film and TV production industry, there was still no possibility of restarting his production slate. This was in contrast to film producers who had financial backing from large studios or the SVODs, or who were prepared to underwrite the production themselves in the absence of the Scheme.

After the introduction of the Scheme, Piers was able to get productions off the ground but for his business model and scale of production, there were impacts. In terms of principal photography, the productions in development were skewed towards having fewer extras, to be more studio-based and to being close to London. On the positive side for the UK, this did mean that *Unwelcome*, a production originally intended to be filmed in Ireland, was made in a studio near London.

In respect of foreign sales, these deflated as a result of poor European box office sales and a fairly well-stocked pipeline of cinema content – if Piers had been an HETV producer though, box office sales would not have been an issue. Nevertheless, Piers and his other investors sold the UK exhibition rights to *Unwelcome* to Warner Bros. in October 2020.<sup>33</sup>

Despite the new dynamics of production and sales during the pandemic, Piers overall view of the Scheme was that “It was a world class intervention that kept the industry going and [he] doesn't know what would have happened to the independent [film production] sector had it not been available”.

The sale and distribution of finished TV programmes is the most important source of international revenue for the UK's production industry; however, for many UK producers, particularly in the factual genre, the sales of formats for television programmes rather than the programmes themselves is important.<sup>34</sup> According to Pact, 12% of the UK's TV export revenue in 2021/22 was from format sales.<sup>35</sup>

With regards to format creation and sales, the Scheme reportedly had less of an impact. Thirty-two percent of producers indicated that the Scheme had a positive impact on their ability to create formats; although 38% indicated that the Scheme did help create formats that could be licensed outside the UK – thereby contributing to the UK's TV exports.

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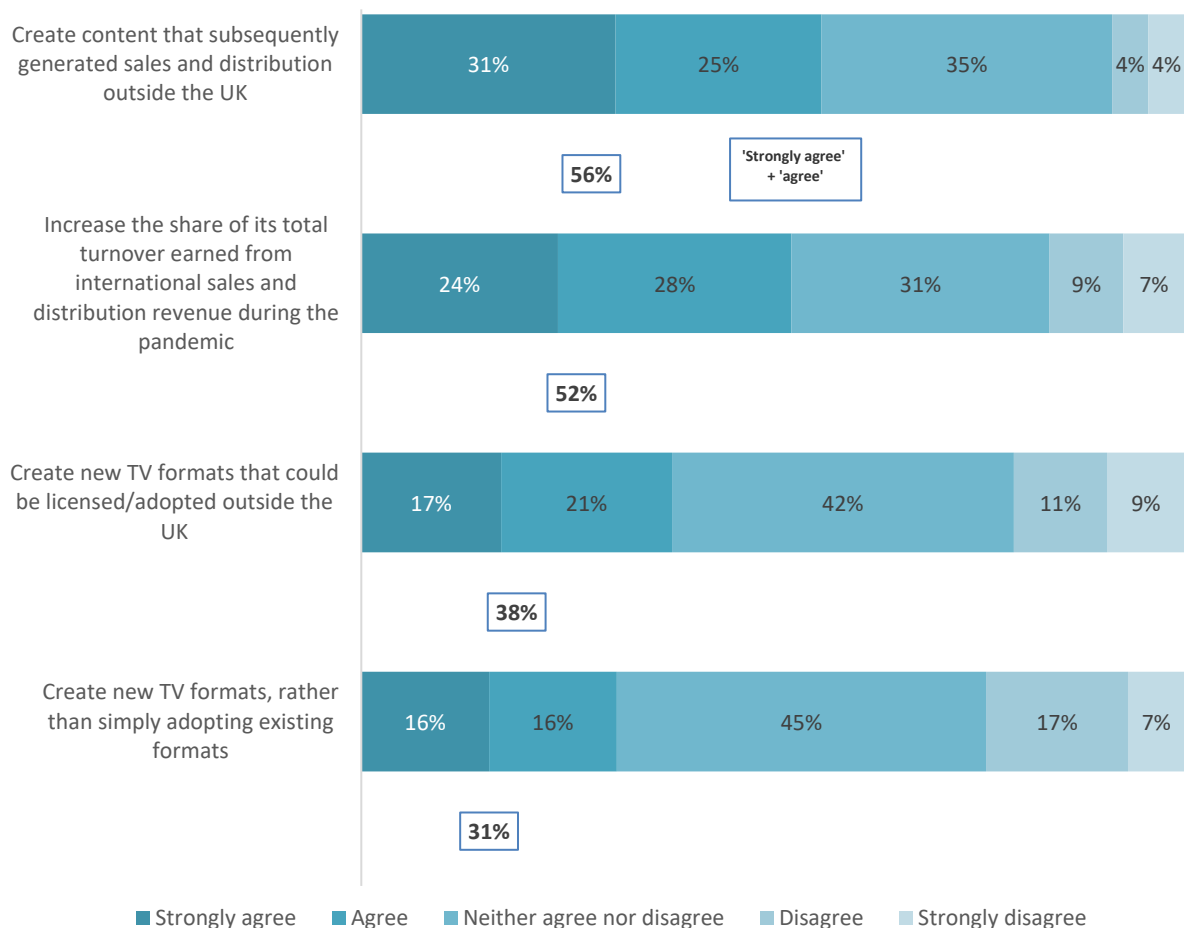
<sup>33</sup> Ramachandran, N (2020) “[Warner Takes U.K. Rights on Creature Feature ‘Little People,’ Starring Hannah John-Kamen, Douglas Booth](#)”. *Variety.com*. 29 October 2020.

<sup>34</sup> 3Vision (2022) P. 7.

<sup>35</sup> 3Vision (2022) P. 7.

**Figure 9 Impact of the Film and TV Production Restart Scheme on IP creation and international sales**

*The Scheme had a positive impact on my company's ability to...*



Source: Producer survey (2022)

n = 71

Note: Some totals may not sum due to rounding.

Although Pact reported that the value of the UK's TV exports declined in 2020/21 – albeit by only 3% - from a more strategic perspective, the evaluation research pointed to the Scheme playing a key role in helping the UK TV production sector capture vital market share within what was arguably a sellers' market for content.

With the onset of the pandemic, the global film distribution industry experienced a significant contraction, as a result of the closure of the exhibition window.<sup>36</sup> Indeed, many independent distributors faced significant financial difficulty.

The situation was better in the television sector. Audiences were, of course, at home and watching more television - and rapidly signing up to existing and newly launched SVOD services. These SVOD services, along with UK PSBs, were in need of original content to build and maintain their viewership.

The Scheme allowed the UK's production industry to quickly resume production of television programming – indeed faster than many other countries – and thereby take advantage of this sellers' market.

<sup>36</sup> Exhibition window refers to the period of time that a film will be available for viewing in cinemas.

### 3.10 Diversity and equity in content

The Scheme guidelines required that registered productions “comply” with a variety of social commitments (see Box 9). Among these social commitments, productions were prohibited from employing people on unpaid internships and paying employees and contractors less than the National Living Wage. These were the only enforceable social commitments. The remaining social commitments were designed to encourage productions to “consider” increasing diversity; reduce bullying, harassment and racism in their workplaces and in the screen industries at large; publish their own diversity targets; make financial contributions to appropriate ScreenSkills funds; and offer ScreenSkills training.

#### Box 9 Film and TV Production Restart Scheme social commitments

11.1 An Eligible Participant must at all times comply with the following social commitments in respect of an Eligible Production that is a New Production (each a “Social Commitment” and together the “Social Commitments”):

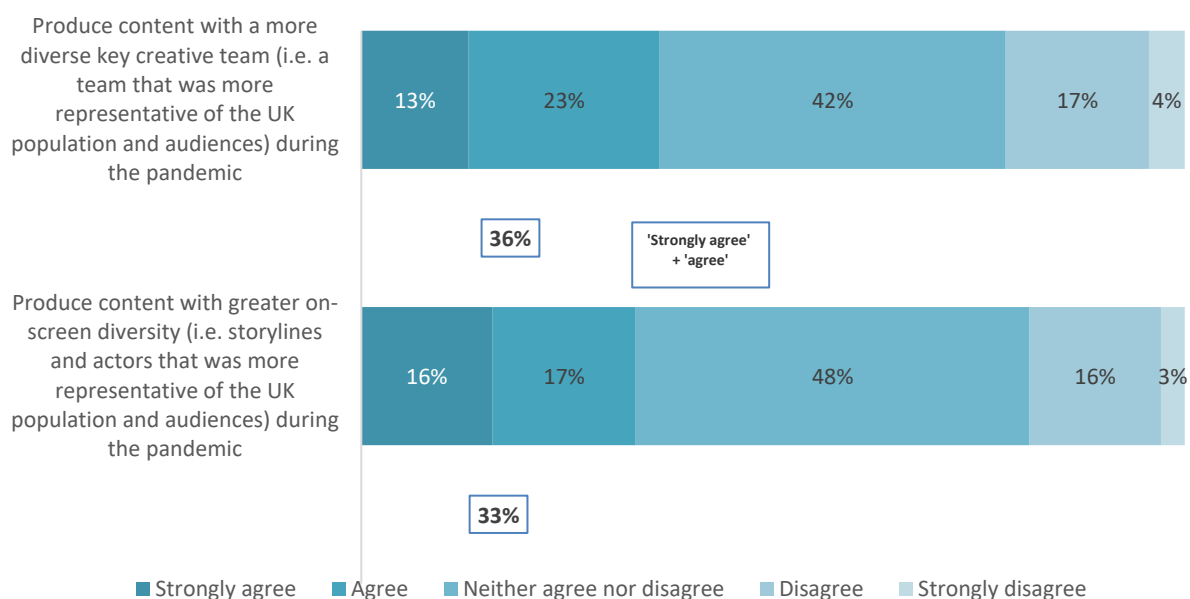
- (A) not to employ individuals on unpaid internships on the Eligible Production;
- (B) to ensure that all employees and contractors of the Eligible Participant engaged on the Eligible Production are paid the National Living Wage;
- (C) to consider meaningfully how the Eligible Participant can:
  - (i) where the Eligible Production is of a feature film, meet at least two of the BFI’s Diversity Standards and Set of Principles to Tackle and Prevent Bullying, Harassment and Racism in the Screen Industries;
  - (ii) where the Eligible Production is of a series or television programme, meet any relevant requirements or policies relating to diversity, bullying, harassment and racism published by the commissioning broadcaster of the Eligible Production; or
  - (iii) if the Eligible Participant is not reasonably able to meet the criteria described in (i) or (ii) above (as applicable), develop and implement its own policies to promote diversity and tackle bullying, harassment and racism in the workplace and apply them to the Eligible Production;
- (D) to publish on the Eligible Participant’s website the Eligible Participant’s diversity targets and policies on bullying, harassment and racism in the workplace;
- (E) if the Eligible Participant will benefit from UK Corporation Tax High-end Television Tax Relief or Film Tax Relief in respect of the Eligible Production, meaningfully to consider making payments into the appropriate ScreenSkills funds;
- (F) to explore meaningfully the possibility of offering ScreenSkills or equivalent recognised training, organisation placements on shoots, or upskilling to the workforce engaged on the Eligible Production.

Source: DCMS, [Film & TV Production Restart Scheme: scheme rules](#)

The voluntary nature of the social commitments related to diversity and equity has likely played a role in the limited impact that the Scheme had in these areas. According to the survey research, only approximately one-third of surveyed producers believed that Scheme had a positive impact on their diversity and equity by either working with more diverse creative teams or creating content with more on-screen diversity (i.e. storylines and actors more representative of the UK population and audiences) (Figure 10).

**Figure 10 Impact of the Film and TV Production Restart Scheme on diversity and equity**

*The Scheme had a positive impact on my company's ability to...*



Source: Producer survey (2022)  
 n = 71

” ... without [the] Scheme, [producers] would have had a far bigger financial burden, and so, there would have been enormous implications, and it's likely that it would have affected diversity.  
 - Broadcaster

” ...[We] maintained the previous diversity.  
 - Film and TV financier

### 3.11 Audiences

Without the TV content created with Scheme support, there was a risk that PSBs would have had less original UK TV content to air and have to increase their reliance on repeat programming. With less original content, there was a risk that the PSBs may lose audience share. It is notable that the global SVODs did not experience the same insurance market foreclosure as the UK PSBs<sup>37</sup> and producers did. The global SVODs entered the pandemic with existing blanket insurance policies that had several months or even years left on them and provided coverage for COVID-19 risks. For the global SVODs, therefore, as soon as film and TV production was reopened in the UK or other jurisdictions, they could resume or begin filming.

The contrasting positions of the PSBs and SVODs meant that there was a risk that the PSBs could lose audience share to the SVODs. Ofcom audience statistics do not point to a significant drop in audience share.<sup>38</sup> Whilst the SVODs did experience a significant increase in average daily viewing in 2020, all of the PSBs also experienced

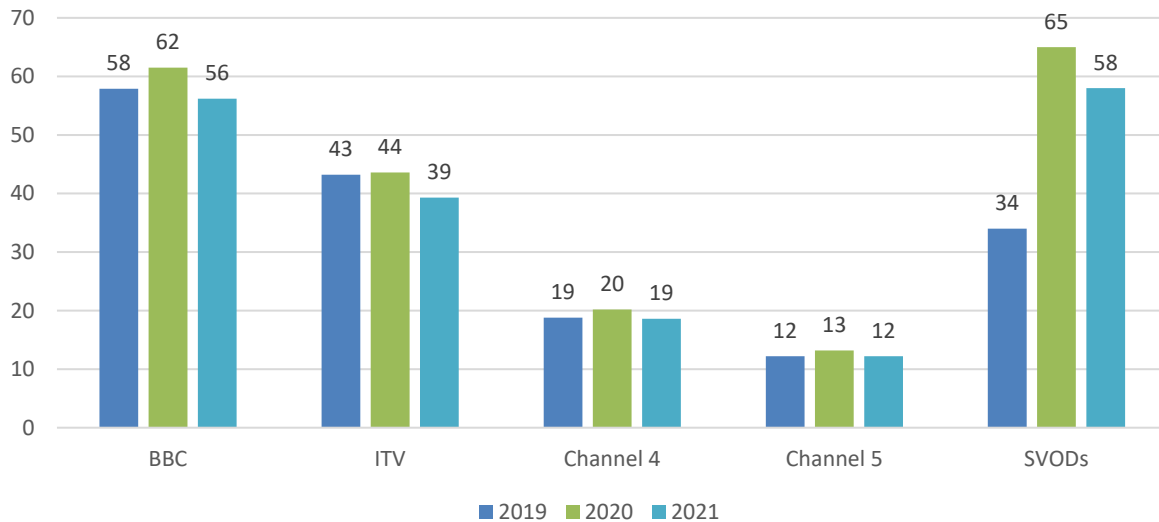
<sup>37</sup> Among the UK PSBs, Channel 5's situation was akin to the global SVODs. Because Channel 5 is owned by Paramount Global, it fell within Paramount's existing insurance policies and could continue with production without have to wait for the launch of the Scheme.

<sup>38</sup> Ofcom (2020a) [Media Nations: UK 2020](#). 5 August. Ofcom (2021) [Media Nations: UK 2021](#). 5 August. Ofcom (2022) [Media Nations: UK 2022](#): 17 August.

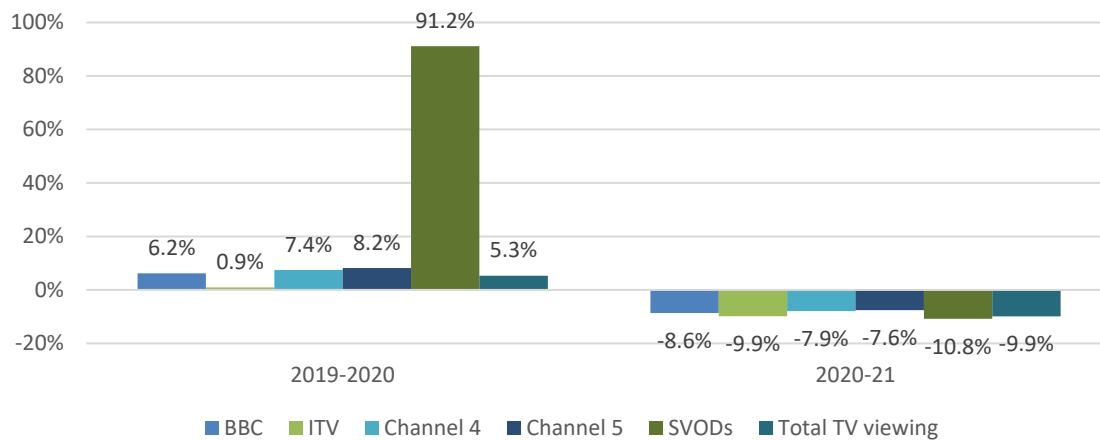
higher viewing (Figure 11a). In fact, all but ITV experienced an increase in average daily viewing that was higher than the average across all TV viewing (5.3%) (Figure 11b). In many respects, the PSBs, particularly the BBC, benefited from the households' need for news and updated information on the pandemic.

**Figure 11 Television viewing statistics, 2019-2021**

**a. Average daily minutes of viewing**



**b. Year-over-year change in average daily minutes of viewing**



Source: Ofcom (2020, 2021 and 2022)

According to broadcasters, the onset of the pandemic presented them with an unprecedented challenge. Although Ofcom temporarily relaxed the enforcement of the PSBs' licence obligations with regards to programming commitments,<sup>39</sup> they still had to fill their schedules. Some PSBs reported that they went into the pandemic with a suitable stock of original content and so were more concerned about what would happen several months into the pandemic if they or their commissioned producers were unable to produce new content. The PSBs reported that they had to focus on in-house production that they could self-insure or seek risk-sharing partnerships with producers in order to get enough productions up and running, in order to generate content to fill their schedules.

<sup>39</sup> Ofcom (2020b) [Ofcom Broadcast and On Demand Bulletin](#). Bulletin issue 399. 23 March.

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- ” We had a lot of stuff in the can – delivered and ready to go. The issue was more for stuff that was midway [in production] or new projects...  
- Broadcaster
- ” We tried to squeeze out existing inventory. The big issue was how to keep going without insurance.  
- Broadcaster
- ” [Before the Scheme was launched, we] looked at what production [we] could pursue.  
- Broadcaster
- ” [The] pandemic stopped productions but [we] restarted [a couple of productions] by doing a deal with [unnamed producer] by sharing the underwriting of the risk.  
- Broadcaster
- 

The Scheme was undeniably important to the PSBs ability to resume their co-productions and commissioning of independent production, in order to fill their schedules. However, during the evaluation research, the interviewed PSBs did not point to the Scheme, per se, as being a key factor in maintaining their engagement with audiences.

## 3.12 Value for money

In accordance with National Audit Office guidance, the value for money of the Scheme was assessed in terms of effectiveness, efficiency and economy.

### 3.12.1 Effectiveness

By all accounts, the Scheme has been effective from an economic perspective. Whilst ex ante targets were set for the Scheme’s outputs, outcomes and impacts, the ex post results are compelling. As outlined in Section 3.1, the Scheme has supported 1,259 productions and over 400 production companies. These productions have generated £3.06 billion in production expenditure in the UK across a 23 month period, or £1.60 billion on an annualised basis.

The overall £3.06 billion in production expenditure itself generated a total of £2,254.4 million in net GVA. When excluding the induced economic impacts, the net GVA impact was £1,803.3 million.

### 3.12.2 Efficiency

Data supplied by DCMS indicates that the delivery costs of the Scheme are expected to be £5.7 million (Table 11). The value of the Government’s expected claim exposure (at the time of writing) was £49.5 million. Therefore, the Scheme’s total cost to the Government stood at £55.2 million (at the time of writing).<sup>40</sup> The Scheme collected a total of £35.6 million in registration fees (net amounts contractually retained by Marsh Commercial) (Table 11). When set against the expected claims exposure of £49.5 million, the latter is reduced to £13 million and the total Scheme cost falls to £19.6 million.

Based on these estimates of the net economic benefits and total Scheme costs, the Scheme yielded a benefit-cost ratio (BCR) of 92:1 (excluding induced economic impacts) and 115:1 (total economic impact inclusive of

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<sup>40</sup> The figure of £5.7 million for total delivery costs includes actual spending at the time of writing plus a forecast of spending to the end of the Scheme. The figure of £49.5 million in claims is an estimate of the expected ultimate pay out of claims. The actual level of claims payments may be different, once claims outstanding at the time of writing are settled.

induced economic impacts). Both BCRs can be considered ‘very high’. Indeed, according to Government guidance, a BCR of over 4:1 indicates ‘very high’ value for money.<sup>41</sup>

Whilst the BCR was very high, it is important to recognise that the Government did assume a high degree of fiscal risk with the Scheme, within a market environment of very high uncertainty. Indeed, the market uncertainty was too high for the insurance market to function and so the Government had to intervene to take on the risk. Ultimately, the Scheme’s claims are expected to total a maximum of £49.5 million. However, the Government did commit to paying up to £500 million in claims. Under a different scenario, the Government could have faced a much higher cost, without commensurately higher economic benefits. Simply put, as claims approached the £500 million ceiling, the BCR would have dropped to 5:1 (total economic impact inclusive of induced economic impacts). Nevertheless, even under this worst-case scenario, the BCR would still have been very high when viewed in relation to Government guidance.

” The sector's low claims rate [is] a reflection of the risk management protocols adopted. It was an excellent Scheme delivered at a time of need.  
 - Factual/Entertainment producer

The results of sensitivity analysis for the BCR can be found in Appendix F. The sensitivity analysis demonstrates that the rate of additionality could drop as low as 1% to 2% and still yield a BCR of 1.0 or higher.

**Table 11 Calculation of the Film and TV Production Restart Scheme value for money, net of Scheme registration fees**

	Direct + Indirect economic impact	Total economic impact
Economic benefit - additional GVA (£m)	1,803.3	2,254.4
Delivery costs (£m) <sup>1</sup>	5.7	5.7
Expected claims exposure (£m) <sup>1</sup>	49.5	49.5
Less: collected registration fees (£m)	35.6	35.6
Total Scheme cost (£m)	19.6	19.6
<b>Benefit-cost ratio</b>	<b>92:1</b>	<b>115:1</b>

Source: Nordicity / Saffery Champness calculations based on data from DCMS, Marsh Commercial, BFI *Screen Business 2021*, producer survey (2022) and ONS

Notes:

1. Interim figures as at time of writing; final figure to be provided by DCMS.

<sup>41</sup> Department for Transport (2020) [Value for money indicator 2019](#). December (updated 19 December 2022).



### 3.12.3 Economy

The economy of the Scheme should be viewed in the context of the other Coronavirus business support schemes offered by the UK Government. During the COVID-19 pandemic, the Government offered several pan-economy support schemes to UK workers and business, including:

- The **Coronavirus Job Retention Scheme (CJRS)** ran from 1 March 2020 to 30 September 2021 and provided grants to employers to cover 80% of furloughed employees' wages up to a maximum of £30,000 annually. This scheme distributed a total of £70 billion to 1.4 million employers in relation to 11.7 million furloughed jobs.
- **Self-Employment Income Support Scheme (SEISS)** provided five rounds of grants to self-employed workers. The scheme distributed £28.1 billion to 2.9 million individuals between July 2020 and October 2021.
- **Coronavirus Business Interruption Loan Scheme (CBILS)** provided businesses with an annual turnover under £45 million with loans of up to £5 million. The Government assumed up to 80% of any losses incurred by lenders. As of May 2021, the scheme had backed 109,877 loans with a total value of £26.4 billion.

As noted in Section 3.2, this evaluation analysis indicates that without the Scheme, up to £2.17 billion in film and TV production in the UK would likely not have proceeded. The loss of production expenditure would have put the employment of 73,400 production-industry jobs or 48,500 FTEs of employment – including direct, indirect and induced impact employment – in jeopardy. Without work in film and TV production or at businesses that supply those productions, many of these workers would have had to resort to accessing either the CJRS or SEISS to provide them with household income.

At the outset of the pandemic and lockdown, one of the most troubling aspects for the film and TV workforce was that a large swathe of it was neither eligible for the CJRS nor SEISS. According to a survey of 998 film and TV workers in April 2020 conducted by the Film and TV Charity, only 18% of the workforce was eligible for the CJRS and approximately 27% was eligible for the SEISS.<sup>42</sup> This left 55% of the film and TV workforce ineligible for the Government's Coronavirus support at the outset of the pandemic, namely because of their freelance status. Indeed, data published by DCMS indicates that 50% of the workforce employed in the film and TV production industry were self-employed, compared to only 16% across the entire economy.<sup>43</sup> According to the Film and TV Charity's survey research, many freelance workers in the film and TV production industry were ineligible for the SEISS because they either operated as one-person limited companies, were working on PAYE freelance contracts or had been working as a freelancer for less than one year.

Without the ability to access the CJRS or SEISS, many of these freelance film and TV production workers may have been forced to seek employment in other industries – to a much higher degree than would have been the case in other sectors of the economy. Indeed, according to Film and TV Charity, approximately 20% of film and TV workers reported in April 2020 that they were 'definitely' going to leave the industry; a further 29% reported that they might leave the industry.<sup>44</sup> This out-migration would have drained the film and TV production industry of human capacity, thereby only further exacerbating the skills shortage within the industry, which was already slowing its potential for growth prior to the pandemic.

Whilst it was not an ex ante objective of the Scheme to address this gap in Coronavirus support coverage within the film and TV production industry, to demonstrate the Scheme's economy it is important to note that if the Scheme did not exist and the additional production activity did not resume, a higher number of film and TV production workers would have availed themselves of the CJRS, SEISS (if they were eligible) or Universal Credit (if they were not eligible for either the CJRS or SEISS, and did not necessarily find work in another industry at the beginning of the pandemic).

Detailed and comprehensive data is not available to effectively quantify the counterfactual cost to the Government of resorting to pan-economy Coronavirus Government support schemes to support the film and

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<sup>42</sup> Film and TV Charity (2020) The Film, TV and Cinema Industry Survey. April.

<sup>43</sup> DCMS (2021) [DCMS Sectors Economic Estimates: Employment in DCMS sectors: October 2019 to September 2020](#). January.

<sup>44</sup> Film and TV Charity (2020).

TV production workforce. However, the evaluation team notes that the £19.6 million net cost to the Government of the Scheme means that the Scheme cost, on average, only £404 per additional FTE supported (48,500 FTEs). It is highly likely that these 48,500 FTEs would have collected more than £404 in Government Coronavirus financial support from either the CJRS, SEISS or Universal Credit during the pandemic. With that in mind, the Scheme was very economic for the Government. In other words, it permitted the Government to support the film and TV production workforce at a much lower average and total cost than would have been the case via the Government's pan-economy Coronavirus support schemes.

## 4. Conclusions and recommendations

### 4.1 Conclusions

This evaluation research clearly points to the Scheme successfully meeting most of its objectives in terms of impact and economic impact in particular. There was a clear market failure rationale for the introduction of the Scheme, as the insurance market had completely foreclosed to most UK film and TV producers, leaving them unable to secure broadcaster or third party financing to proceed into production.

Considering the complexity of the situation, the unprecedented nature of the policy challenge, the turmoil in the insurance markets and real economy, and the multiple stakeholders involved, the Government was able to introduce the Scheme relatively quickly. Indeed, it is the unified commitment of stakeholders from across Government and the film and TV industry which was a key factor in this quick rollout.

The Scheme take up was very robust. Indeed, some producers had hoped the Scheme would have started earlier, so they could resume production sooner, after the BFC and Pact had introduced guidelines and COVID-19 safe working practices. Nevertheless, the Scheme was introduced early enough such that once film and TV production had resumed the UK was well-positioned vis-à-vis other countries as a location for both international and domestic production.

- 
- ” It was a godsend.  
- Film and TV financier
  - ” [The] Scheme was a world leader  
- Film producer
  - ” It was incredibly effective, everyone should be congratulated.  
- Film and TV financier
  - ” We are very grateful to the Government to have the foresight to put the Scheme in place.  
- Comedy producer
  - ” [The] Scheme was crucial for the continuance of production in the sector enabling staff to be retained, business sustained and original programming for audiences.  
- Factual/Entertainment producer
  - ” Overall the Scheme was an excellent use of Government intervention to keep the production sector working – which kept production companies in business, personnel employed and content on screens for citizens  
- Factual producer
  - ” Overwhelming feeling is thank you... it was market-leading, worked for indie-level productions. An overwhelming success and inspired of the Government to do this.  
- Film and TV financier
  - ” A solution that worked. Made me feel proud to be British.  
- Film and TV financier
-

By 'de jure' definition, the Scheme was 100% additional. However, even on a de facto basis, the additionality was relatively high (73%). Producers who participated in the evaluation research were virtually unanimous that they would not have been able to restart or start production without the Scheme, thereby putting their businesses in clear jeopardy of financial failure.

Given that large swathes of the film and TV workforce were not eligible for the CJRS or SEISS, the Scheme turned out to be an essential lifeline for thousands of production industry workers and their families.

The Scheme not only helped production businesses by allowing them to resume production, but it also restored their business confidence, meaning that many production companies could start to plan for the future again and look to innovate. Indeed two-thirds of producers reported that the Scheme had a positive impact on their innovation, although the impact on their ability to take risks was less. Crucially, the Scheme allowed many production companies to create content so they could tap into what was fast becoming a sellers' market. This bolstered UK production companies' international sales, thereby further adding to the Scheme's economic contribution.

In terms of wider policy objectives, the Scheme made a positive contribution to the Government's levelling up agenda by stimulating a larger share of film and TV production outside of London than had previously been reported by the BFI (in 2019 for film and HETV production). The Scheme guidelines encouraged producers to increase equity and diversity in the film and TV production industry; the evaluation evidence suggests that one-third of participating producers increased the diversity of their creative teams and their on-screen content.

With over £3.06 billion in production expenditure stimulated and 73% additionality, the economic benefits of the Scheme on a GVA basis were over one hundred times the costs of delivering the Scheme. Whilst the Government set aside £500 million to cover Scheme claims, the Scheme design and producers' diligence and commitment to the mitigation of COVID-19 meant that maximum Scheme claims will only total one-tenth (£49.5 million) of this earmarked amount. Scheme delivery costs were nominal (£5.7 million, at the time of writing). The Scheme collected a total of £35.6 million in registration fees (net amounts contractually retained by Marsh Commercial), which partially offset both claims and delivery costs. The net cost of the Scheme to the Government was, therefore, £19.6 million. As a result, the Scheme yielded a BCR of 115:1, based on the value of the total economic impact, or 92:1, when induced economic impacts are excluded from the BCR calculation.

From a value-for-money perspective, the Scheme was also very economic for the Government. Without the Scheme enabling a large swathe of film and TV production to restart, the Government would have likely faced an additional fiscal cost to support unemployed film and TV production workers via the CJRS, SEISS or Universal Credit.

## 4.2 Recommendations

The evaluation research demonstrates that the Scheme had a significant positive impact and delivered value for money. This positive result is more important, given that the Scheme was developed at pace in an environment of high market uncertainty. And whilst it is unlikely that the Scheme itself will have to be introduced again in the foreseeable future, the design and delivery of the Scheme can offer several recommendations for the development of other Government programmes in the future, particularly those that must be developed quickly and in an environment of high uncertainty.

For the most part, these recommendations reflect key learnings and good practices observed within the Scheme that could be applied to other government programmes in the future. In some cases, however, the recommendations do reflect areas of Scheme delivery that the evaluation research indicated could have been approached differently by the DCMS Oversight Team or Steering Board.

### **1. Provide clear and accessible guidelines accompanied by an information campaign to fully explain new guidelines**

Producers noted how many of the types of costs that they thought would have been covered by the Scheme did not qualify as eligible losses, so they felt the coverage was less than expected. This may have been due to a misinterpretation of the Scheme rules, or the expectation by producers that the Scheme would operate in a similar manner to insurance coverages that they were accustomed to using. These instances of misinterpretation emerged despite the fact that DCMS convened regular meetings with producers and offered a channel for producers to submit questions.

In the same way that DCMS sought to ensure that producers had all the information they needed to engage with the Scheme, it is important that novel – and even existing – programmes similar to the Scheme offer clear and accessible guidelines. This could be done by adopting information campaigns that include explanatory information sessions (i.e. physical or virtual roadshows), which would help reduce the likelihood of misinterpretation of the guidelines.

### **2. Direct industry business knowledge must be readily accessible to Government**

Government was able to design and launch the Scheme at pace because there was deep knowledge of how the production business worked residing directly within Pact, BFI and DCMS. This may not always be the case, where an industry may not be subject to the same regulation or policy support as film and TV production is. The same applies to the insurance or financial industry subject matter expertise needed to design, launch and deliver an indemnity or compensation programme such as the Scheme. Above all, the Government needs to be able to help build trust among all subject matter experts in order to deliver such a programme at pace, as it provides the foundation for the necessary collaboration and information sharing.

### **3. Enhanced evidence of commercial viability and additionality**

Within the Scheme, productions with budgets under £30 million could self-assess commercial viability and thereby the additionality of the Scheme. The survey research revealed, however, that this self-assessment could have been inaccurate in at least 6%<sup>45</sup> of cases, and possibly higher. Wherever possible, the Government should ensure that it can collect evidence to ensure that it can effectively scrutinise the additionality of intervention.

This is not an issue that is specific to the Scheme or even Government programmes similar to the Scheme. In fact, the need to collect evidence to assess the additionality of Government intervention is a key issue across all programme and policy evaluation. However, the key learning from the Scheme is that even where a programme is considered to be additional from a de jure perspective that does not necessarily mean that it also is on a de facto basis, and so alternate methods for assessing additionality should be incorporated into the programme monitoring and evaluation plan.

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<sup>45</sup> On the evaluation research survey, producers were asked to rate (on a scale of 0 to 10) the likelihood that their Scheme-registered productions would have proceeded without Scheme support. Six percent of survey respondents reported a likelihood of '10' (i.e. 100%), under the 1% fee regime. Under the 2.5% fee regime, 7% of survey respondents reported a likelihood of '10' or (i.e. 100%).

#### **4. Real-time programme reporting and dashboard**

For a novel programme such as the Scheme, it is vital that the Government can continually monitor its progress. It may not be sufficient to wait several months for a process evaluation to be commissioned and carried out. Instead, similar novel programmes – particularly where delivered by a third party – should incorporate as much as possible real-time or daily reporting and the use of dashboards. The Scheme itself did this using the KPI dashboard maintained by DCMS using weekly data supplied by Marsh Commercial. This type of KPI dashboard and real-time reporting, in general, will enable continued programme improvement to ensure it remains fit for purpose and responds to industry developments.

#### **5. Unenforceable social commitments should be included in guidelines and monitored, where specific interventions may not be feasible**

Whilst most of the Scheme’s social commitments were not enforceable, the inclusion of them in the rules formed an important channel for the Government to signal its policy intentions and encourage industry. Indeed, despite the unenforceability of the social commitments, the evaluation research did find that one-third of producers increased their social impact by increasing the diversity of their content. For other programmes, therefore, social commitments or other types of requirements that cannot necessarily be reasonably enforced should not be left out. Even in the absence of enforceability, such ‘encouragement’ requirements should be kept and monitored.

Still, it should be noted that the Scheme was designed primarily to stimulate film and TV production activity during the pandemic that would not have otherwise occurred. This policy goal is not necessarily contradictory to the Government’s policy goals related to increasing diversity and equality, and reducing bullying, harassment and racism in the workplace. However, specific policy objectives often require targeted intervention to achieve those objectives, rather than relying on indirect outcomes. So where the Government wishes to move beyond simply signalling its policy direction and would prefer to achieve tangible outcomes, it would be better to implement programmes that target social impact goals.

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## 6. Appendix A: International comparators

The global film insurance sector stepped back from insuring COVID-19-related interruptions early in the pandemic in 2020, and this was a global phenomenon. This meant that productions had to either cease filming, self-insure, or rely on interventions by governments or supra-national bodies such as the Scheme. However, some other jurisdictions also initiated mitigations in response to the pandemic. The European Audiovisual Observatory maintained a 'COVID-19-tracker' of the breadth of responses across Europe. In this section we focus our findings on those interventions similar to the Scheme, which involved some type of indemnity, insurance, or guarantee.

**Table A - 1 International examples of film and TV production indemnity schemes**

Scheme	Fund size	Maximum claim	Start/Announced	End
<b>Belgium (Wallonia)</b> Part of St'Art Fund (Impact Fund for Culture and Creativity) <sup>46</sup>	€5m	20% of total budget up to €1m	01-Jul-20	30-Jun-21
<b>France</b> <sup>47</sup> Les fonds de la garantie contre pour tournages	€50m	20% of total budget up to €1.2m or	06-May-20	22-Jun-20
	€100m	30% of total budget up to €1.8m	23-Jun-20	31-Mar-22
<b>Germany</b> Ausfallfonds (Production Continuation Fund) <sup>48</sup>	€100m	If federal funding is 50%, 95% to a max of €1.5m If federal funding < 50%, 50% to a max of €750k	11-Sep-20	31-Mar-23
<b>Ireland</b> Production Continuation Fund <sup>49</sup>	€5m	€500k	Sep-20	31-Dec-21
	€5m	€300k	01-Jan-22	31-Dec-22
<b>Netherlands</b> Pandemic Guarantee Scheme <sup>50</sup>	€10m <sup>51</sup>	20% of Dutch production costs up to €750k	10-Jun-20	31-Dec-21
<b>Australia</b> Temporary Interruption Fund <sup>52</sup>	AUD 50m	AUD 4m or 60%	25-Jun-20	13-Oct-22
<b>Canada</b> Short-Term Compensation Fund <sup>53</sup>		CAD1.5-3.0m	28-Oct-20	31-Mar-23
	CAD 50m		28-Oct-20	31-Mar-21
	CAD 149m		01-Apr-21	31-Mar-22
	CAD 150m		01-Apr-22	31-Mar-23

Sources: Centre du Cinéma et de l'Audiovisuel (Fédération Wallonie-Bruxelles, Belgium), Centre National du Cinema et de l'image animée (France), German Federal Film Board, Screen Ireland, Nederlander Filmfonds, Screen Australia and Telefilm Canada

<sup>46</sup> Centre du Cinéma et de l'Audiovisuel (2020) [Prolongement du Fonds de garantie pour les tournages](#). Press release. 25 September.

<sup>47</sup> Centre National du Cinéma et de l'image animée (2020) [Doublement de la garantie contre le COVID-19 pour les tournages de films et de séries : un pool d'assureurs mutualistes français propose une solution assurantielle en complément du fonds public](#). Press release. 23 June.

<sup>48</sup> German Federal Film Board (2020) [Default fund to compensate for the Covid19-related default risk in German cinema film and high-end series production](#). 11 September.

<sup>49</sup> Screen Ireland (2023) [Production Continuation Fund – Pilot Initiative](#).

<sup>50</sup> Nederlander Filmfonds (2020a) [New support measures for the Dutch film sector](#). 11 June. Nederlander Filmfonds (2023) [Pandemic Guarantee Scheme \(additional COVID-19 measure\)](#).

<sup>51</sup> Netherlands Filmfonds (2020b) [Elaboration of the second support package for the film sector known \(translated\)](#), 24 November.

<sup>52</sup> Screen Australia (2022a) [Temporary Interruption Fund \(TIF\) - Program Guidelines](#). 7 July. Screen Australia (2022b) [Important update to Temporary Interruption Fund \(TIF\)](#). 13 October.

<sup>53</sup> Telefilm Canada (2023) [Short-Term Compensation Fund for Canadian Audiovisual Productions \(STCF\) – Summary](#).



**Table A - 2 Statistics for Canada's Short-term Compensation Fund**

Period	No. of productions	Coverage (CAD m)	Total production volume (CAD m)	No. of claims	Value of claims (CAD m)
28 October 2020 to 31 March 2021	187	105	612	3	0.3
1 April 2021 to 31 March 2022	713	450	2,600	22	4.1
1 April 2022 to 31 March 2023*	677	376	2,600	20**	2.5

Source: Telefilm Canada

\* Data as of 7 February 2023

\*\* 26 under evaluation

## 7. Appendix B: List of interviews

No.	Organisation name	Stakeholder group
1	Rococo Films Ltd / Tempo Productions Ltd	Producer*
2	ITV Studios Ltd (unscripted production division)	Producer*
3	See-Saw Films Ltd	Producer*
4	Spartiate Films (TFF) Ltd	Producer*
5	Bad Wolf Ltd	Producer*
6	House Productions Ltd	Producer*
7	Avalon Entertainment Ltd	Producer*
8	Molinare TV & Film Ltd	Producer*
9	Raise the Roof Productions Ltd	Producer*
10	Double Band Films Ltd	Producer*
11	ITV Studios Ltd**	Producer**
12	Film and TV Charity	Industry body
13	Screen Scotland	Industry body
14	Channel 4	Broadcaster
15	BBC	Broadcaster
16	ITV	Broadcaster
17	Channel 5 (Paramount)	Broadcaster
18	Ingenious (Ingenious Capital Management Ltd)	Financier
19	AI Film Management Ltd	Financier
20	Film Finances Ltd	Financier
21	Media Finance Capital Ltd	Financier
22	Coutts & Company	Financier
23	Spotlite Claims Ltd	Insurance industry
24	Sedgwick International	Insurance industry
25	UK Media Insurance Brokers Ltd	Insurance industry
26	DCMS Scheme Oversight Team	Scheme Oversight Team
27	DCMS Steering Board members	Scheme Steering Board
28	British Film Institute	Scheme Steering Board
30	HM Treasury	Scheme Steering Board
31	Independent Steering Board Member	Scheme Steering Board / Insurance industry

\* Producer with at least one production registered with Scheme.

\*\* Production eligible for Scheme but chose not to register.

## 8. Appendix C: Interview guides

### Background:

In response to a lack of commercially available insurance against COVID-19 risks to film and TV production, the UK Government introduced the Production Restart Scheme – a Government-backed indemnity scheme to cover any losses that domestic film and TV producers would incur from COVID-19-induced stoppages or cancellations of filming.

The Scheme was first announced by Government on 28 July 2020 and officially launched on 16 October 2020. It was initially meant to stay open until 31 December 2020; however, it was subsequently extended several times. Under the final extension, the Scheme remained open to registrations until 30 April 2022 and covered losses incurred before 30 June 2022. Notably, the initial Scheme premium of 1.0% of the production budget was increased to 2.5% from 1 November 2021.

RSM Consulting previously completed a process evaluation of how the Scheme was operating. With the winding-up of the Scheme in summer 2022, the British Film Institute (BFI), on behalf of Government has now commissioned Nordicity and Saffery Champness LLP to prepare a combined impact and economic evaluation of the Scheme.

The following omnibus consultation guide includes all of the questions that the consultants wish to discuss with the various key stakeholder groups. However, please refer to your specific stakeholder group for the topics and questions particular to you and your interview.

### A. Producers (successful Scheme applicants)

1. At the beginning of the pandemic, how was your content production schedule affected by the withdrawal of insurance and indemnity services from the production market?
2. Prior to the introduction of the Scheme – and taking account of the introduction of the COVID-19 health and safety measures – had you identified to what extent, if any, you would be able to resume production without a Government-backed scheme?
3. If you were unsuccessful in some of your Scheme applications, can you provide some insight as to why (e.g. were particular genres more unsuccessful than others) and to whether you thought that was legitimate given the wider context of a public sector facing a pandemic and financial shock.
4. Given the increased risks to production during the pandemic, did the Scheme help preserve the nature and rate of your content creation?  
*Or despite the Scheme, was there a narrowing of genre, a more risk averse approach to the stories being told, a more risk averse approach to the creatives chosen (less diverse), a slower throughput of product, etc.?*
5. When the Scheme premium changed from 1.0% to 2.5% in November 2021, what was the impact on your content production schedule? Was the increased premium reasonable given any increased financial resilience and/or business confidence you were feeling at that time and subsequently during the Scheme period?
6. Did the introduction of the Scheme help preserve the workforce you would typically draw upon?  
*For example, did it prevent or bring people back from furlough, did it help bring people back into the industry if they had moved sector or stop people leaving in the first place?*
7. Given that different jurisdictions re-started their production industries in different ways, did you see a competitive impact when selling your Scheme-supported content for distribution and exhibition in foreign jurisdictions?  
*I.e. did you sell more or achieve better terms?*
8. Can you provide any examples of production service companies (incl. post-production, VFX and animation) that without the production restarted by the Scheme might not have survived?
9. In what way do you think the Scheme could have been improved to increase its impact and why?

10. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
11. And to finish, is there any further insight or comment you have about the Scheme?

**B. Producers (only unsuccessful Scheme applicants)**

1. At the beginning of the pandemic, how was your content production schedule affected by the withdrawal of insurance and indemnity services from the production market?
2. Prior to the introduction of the Scheme – and taking account of the introduction of the COVID-19 health and safety measures – had you identified to what extent, if any, you would be able to resume production without a Government-backed scheme?
3. When considering your unsuccessful Scheme applications, can you provide some insight as to why they failed?  
*Were there common factors involved e.g. were particular genres more unsuccessful than others?*
4. Has your inability to access the Scheme had any long-term impacts on your business?
5. Are you aware of any production service companies (incl. post-production, VFX and animation) that without the production restarted by the Scheme would not have had sufficient work?
6. In what way do you think the Scheme could have been improved to increase its impact and why?
7. Were there particular advantages to the Scheme that were an improvement over the pre-pandemic status quo?
8. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
9. And to finish, is there any further insight or comment you have about the Scheme?

**C. Producers (eligible but did not apply to Scheme)**

1. At the beginning of the pandemic, how was your content production schedule affected by the withdrawal of insurance and indemnity services from the production market?
2. Prior to the introduction of the Scheme – and taking account of the introduction of the COVID-19 health and safety measures – had you identified to what extent, if any, you would be able to resume production without a Government-backed scheme?
3. When the Scheme was introduced what was your reasoning for not taking up the Scheme?  
*By not using the Scheme did you have any advantages over productions that were subject to Scheme conditions?*
4. Did you indemnify your production(s)? If so, how? If not, why not?
5. Are you aware of any production service companies (incl. post-production, VFX and animation) that without the production restarted by the Scheme would not have had sufficient work?
6. In what way do you think the Scheme could have been improved to increase its impact and why?
7. Were there particular advantages to the Scheme that were an improvement over the pre-pandemic status quo?
8. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
9. And to finish, is there any further insight or comment you have about the Scheme?

**D. Producers (ineligible for Scheme)**

1. At the beginning of the pandemic, how was your content production schedule affected by the withdrawal of insurance and indemnity services from the production market?

2. Prior to the introduction of the Scheme – and taking account of the introduction of the COVID-19 health and safety measures – had you identified to what extent, if any, you would be able to resume production without a Government-backed scheme?
3. Given that your productions were ineligible, what aspects of their ineligibility did you consider to be undesirable or unfair, and why?
4. Are you aware of any production service companies (incl. post-production, VFX and animation) that without the production restarted by the Scheme would not have had sufficient work?
5. In what way do you think the Scheme could have been improved to increase its impact and why?
6. Were there particular advantages to the Scheme that were an improvement over the pre-pandemic status quo?
7. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
8. And to finish, is there any further insight or comment you have about the Scheme?

#### **E. Industry bodies**

1. At the strategic level, did you observe a differential desire to apply to the Scheme by different parts of the industry? And if so, do you have any insight into why that was so?  
*For example, did size of production companies make a difference?*
2. At the strategic level, were different parts of the industry more successful in applying for the Scheme? And if so, do you have any insight into why that was so?  
*For example, were particular genres more successful? Film vs TV? Large vs small/independent?*
3. How important of a role did the Scheme play in helping producers protect the sustainability of their businesses during the pandemic?
4. What was the impact of the Scheme in your view on retaining current skills and talent, and on the take up of new entrants (as part of sustaining the pipeline)?  
*Have there been particular areas where there has been a sustained loss of workers? Despite the Scheme has there been an increase in migration to other sectors or an earlier loss of workers who were close to retirement?*
5. Did the Scheme help maintain to some extent a diversity of content production, and if so, to what extent?
6. How have productions supported by the Scheme competed in the international distribution/exhibition market?  
*Has there been a perceptible reduction in competition?*
7. When the Scheme premium changed from 1.0% to 2.5% in November 2021, what was the impact on the above?  
*Had financial resilience or confidence returned such that the need for the Scheme was less or the increased cost more sustainable?*
8. Following the Scheme premium rise, did productions cease, go on hiatus or reduce their level of content production?
9. In what way do you think the Scheme could have been improved to increase its impact and why?
10. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
11. Do you have any further insights or comments about the Scheme and its impact on the UK production sector?

**F. Broadcasters**

1. After the start of the pandemic but before the introduction of the Scheme, what was your attitude to financing/distributing/exhibiting new productions, ongoing productions, or stalled productions that may have come to you for financing?
2. At the strategic level, once the Scheme had been launched, what factors influenced your appetite to finance different parts of the content production industry?  
*For example, genre, film vs TV, large vs small/independent.*
3. Did the Scheme encourage you to finance a greater diversity of content production than you would have done had it not been in place during the pandemic?
4. When the Scheme premium changed from 1.0% to 2.5% in November 2021, what was the impact on the above?  
*Had you observed greater financial resilience or confidence at the time of the change such that the need for the Scheme was less or the increased cost more sustainable?*
5. Following the Scheme premium rise, did productions cease, go on hiatus or reduce their level of content production?
6. Have you observed an impact in the level of foreign sales achieved compared to before the pandemic?  
*Has there been a perceptible reduction in competition?*
7. In what way do you think the Scheme could have been improved to increase its impact and why?
8. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
9. And to finish, is there any further insight or comment you have about the Scheme?

**G. Financiers**

1. After the start of the pandemic but before the introduction of the Scheme, what was your attitude to financing new productions, ongoing productions, or stalled productions that may have come to you for financing?
2. At the strategic level, once the Scheme had been launched, what factors influenced your appetite to finance different parts of the content production industry?  
*For example, genre, film vs TV, large vs small/independent.*
3. Did the Scheme encourage you to finance a greater diversity of content production than you would have done had it not been in place during the pandemic?
4. When the Scheme premium changed from 1.0% to 2.5% in November 2021, what was the impact on the above?  
*Had you observed greater financial resilience or confidence at the time of the change such that the need for the Scheme was less or the increased cost more sustainable?*
5. Following the Scheme premium rise, did productions cease, go on hiatus or reduce their level of content production?
6. Have you observed an impact in the level of foreign sales achieved compared to before the pandemic?  
*Has there been a perceptible reduction in competition?*
7. Do you have experience of other guarantee or indemnity schemes in other jurisdictions? If so, in what ways did they differ and what was the impact of the differences?
8. In what way do you think the Scheme could have been improved to increase its impact and why?
9. Were there any unintended or unexpected outcomes (both positive and negative) from the Scheme that you have become aware of?
10. And to finish, is there any further insight or comment you have about the Scheme?

## H. Insurance industry

1. After the start of the pandemic but before the introduction of the Scheme, how would you characterise the film and TV production insurance market?
2. Were production projects treated differently depending upon where they were in their pandemic lifecycle: ongoing production entering the pandemic, production stalled as a result of the pandemic, new production starting in the pandemic?
3. At the strategic level, once the Scheme had been launched, what factors influenced your appetite to insure different parts of the content production industry?  
*For example, genre, film vs TV, large vs small/independent.*
4. Do you have experience of other guarantee or indemnity schemes in other jurisdictions? If so, in what ways did they differ and what was the impact of the differences?  
*Were any better in your opinion and why?*
5. In what way do you think the Scheme could have been improved to increase its impact and why?
6. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
7. And to finish, is there any further insight or comment you have about the Scheme?

## I. Steering Board

1. At the strategic level, what are your overall impressions of how has the Scheme performed, specifically with regards to the impact that it had on film and TV production activity, business sustainability, employment, skills and talent preservation, and retention and furthering diversity within the UK production sector?
2. How does the UK compare to other European and North American countries, where a guarantee/indemnity scheme was launched? What are your impressions of how the Scheme was perceived by those jurisdictions?  
*Was Scheme adopted as a model elsewhere?*
3. Were other models of 'restart' schemes considered? If so, why were they not fit-for-purpose?
4. Now that the Scheme has ended, what have you concluded about what its strengths and weaknesses were?
5. In what way do you think the Scheme could have been improved to increase its impact and why?
6. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
7. And to finish, is there any further insight or comment you have about the Scheme?

## J. DCMS Oversight Team (roundtable)

1. The Scheme was developed by the Government at pace in the face of a high degree of uncertainty and in an area (i.e. financial risk indemnification) where the Government has limited expertise. With the benefit of hindsight, what, if anything, in the design could you have changed to achieve greater economic impact?
  - a. What was the process by which intelligence and evidence was gathered that identified a need for a guarantee/indemnity scheme and provided insight into its design?
  - b. Were other schemes influential in the design of the Scheme?
  - c. Were other models of 'restart' schemes considered? If so, why were they not fit-for-purpose?
2. Now that the Scheme has ended, how would you assess its impact in relation to its original objectives?
  - a. Did the Scheme enable less or more film and TV production than originally forecast?
  - b. What were the Scheme's strengths and weaknesses?

- c. Were there any unintended or unexpected outcomes (both positive or negative) from the Scheme that you have become aware of?
3. How would you characterise the Scheme's ability to encourage the promotion of diversity and the other social commitments stipulated in the Scheme guidelines?
4. What do you think will be the long-lasting impacts of the Scheme, if any?
5. How, if at all, do you think the delivery of the Scheme by Marsh Commercial, the loss adjusters (Spotlite Claims Ltd and Sedgwick International), the Scheme rules (and revisions thereof) or the claims process affected the Scheme's ability to achieve a positive impact?
6. Do you have any comments or insights on projects that were either unsuccessful in their initial Scheme registration or in their claims? Do you believe this had any bearing on the Scheme's final impact?
7. What key learnings from the Scheme could be applied to the development of similar indemnity or screen sector support schemes in the future?
8. Do you have any other comments or insights you'd like to share about the Scheme or this evaluation?



## 9. Appendix D: Producer survey questionnaire

### Production Restart Scheme Impact Evaluation Survey

#### Introduction

As you may be aware, in October 2020, the Government introduced the Production Restart Scheme (Scheme) in order to help cover any additional financial losses that the UK's film and TV producers incurred from COVID-19-induced filming stoppages or cancellations.

Whilst the Scheme was closed to new registrations in April 2022, the Government is very keen to better understand the impact that the Scheme had on the creation of original British film and TV content during the pandemic and UK production companies' long-term business sustainability.

The British Film Institute (BFI) on behalf of the Government has commissioned Nordicity and Saffery Champness to prepare an Impact Evaluation of the Scheme. Although the Scheme is no longer in operation, the evaluation will include recommendations for future similar schemes.

As part of this impact evaluation, we kindly ask you to complete this online survey. It should only take 15-20 minutes to complete.

It is crucial to the success of this work that we have as much information as possible, so please take the time to complete the survey and help us accurately measure the impact of the Scheme. The survey information is completely confidential and will appear in aggregate form only in the final report. The data that you submit as part of this survey will only be held by Nordicity and Saffery Champness in accordance with the data privacy statement (see next page).

Please kindly submit your completed survey response before 30th November 2022.

If you have any questions about the online survey, please contact Dustin Chodorowicz at Nordicity (dchodorowicz@nordicity.com; 0203 950 1273).

Thank you for your participation!

#### Data privacy

Nordicity and Saffery Champness are committed to protecting the privacy of all survey respondents' personal data and meeting its obligations under the General Data Protection Regulation ("GDPR") and the Data Protection Act 2018.

This online survey questionnaire asks you to share your email address (in case we need to contact you to clarify any of your answers). In the process of completing the questionnaire, the SmartSurvey online survey platform will also record your IP address. If you elect to save your partially completed survey questionnaire to resume at a future time, then the SmartSurvey platform will request and separately store the email address that you provide.

Any personal data collected by the SmartSurvey platform will be securely stored and not shared with any third parties other than Nordicity and Saffery Champness. Any personal data collected by the SmartSurvey platform will be permanently deleted 12 months after you submit your completed survey questionnaire.

Further information on SmartSurvey's data privacy policies and practices can be found [here](#). A copy of Nordicity's Privacy Policy can be found [here](#). A copy of Saffery Champness's Privacy Policy can be found [here](#).

Do you agree to allow Smart Surveys, Nordicity and Saffery Champness to securely store your personal data for 12 months from the date that you submit your completed survey questionnaire? \*

- Yes
- No (You will exit the survey.)

### About your production company

1. Please tell us about your production company (optional).

This question is optional, but if you are able to tell us who you are and complete the survey, then we can ensure you do not receive any survey reminders in the future.

Production company name:

Title of a single film or TV project that you registered with the Scheme:

Contact email address:

2. Where is your company's head office located? \*

- England - East Midlands
- England - East of England
- England - London
- England - North East
- England - North West
- England - South East
- England - South West
- England - West Midlands
- England - Yorkshire & Humber
- Scotland
- Northern Ireland
- Wales

Outside the UK

3. Which of the following statements best describes your production activity between October 2020 and April 2022? \*

- All of my company's film and TV projects were eligible for the Production Restart Scheme (Scheme).
- Some of my company's film and TV projects were eligible for the Scheme.
- None of my company's film and TV projects were eligible for the Scheme. [skip to Q28]

4. Which of the following best describes your company's film and TV projects that were eligible for the Scheme? \*

- All of my Scheme-eligible film and TV projects were registered with the Scheme.
- Some of my Scheme-eligible film and TV projects were registered with the Scheme.
- None of my Scheme-eligible film and TV projects were registered with the Scheme. [skip to Q28]

#### Registered projects

5. How many film and TV projects did your company register with the Scheme? \*

Films

TV programmes

Total:

6. In which genres of the production were your Scheme-registered film and TV projects?

(mark all that apply) \*

- Film - fiction
- Film - non-fiction
- High-end television drama
- Continuing drama series (i.e. soap)
- Other TV drama
- Comedy
- Factual/Documentary
- Light entertainment / Family

- Game/Competition show
- Children's TV
- Reality television
- Talk show
- Prefer not to say

7. In which regions were your Scheme-registered projects filmed?

(mark all that apply) \*

- England - East Midlands
- England - East of England
- England - London
- England - North East
- England - North West
- England - South East
- England - South West
- England - West Midlands
- England - Yorkshire & Humber
- Scotland
- Northern Ireland
- Wales
- Outside the UK

8. What was the total combined value of the production budgets for all your Scheme-registered projects? \*

- Less than £250k
- £250k to £499k
- £500k to £999k
- £1m to £1.99m

- £2m to £4.99m
- £5m to £9.99m
- £10m to £19.99m
- £20m to £29.99m
- More than £30m
- Prefer not to say
- Enter amount (£)

9. How many hours of original content do you estimate that you were able to produce with support from the Scheme? \*

Film - fiction	<input type="checkbox"/>
Film - non-fiction	<input type="checkbox"/>
High-end television drama	<input type="checkbox"/>
Continuing drama series (i.e. soap)	<input type="checkbox"/>
Other TV drama	<input type="checkbox"/>
Comedy	<input type="checkbox"/>
Factual/Documentary	<input type="checkbox"/>
Light entertainment / Family	<input type="checkbox"/>
Game/Competition show	<input type="checkbox"/>
Children's TV	<input type="checkbox"/>
Reality television	<input type="checkbox"/>
Talk show	<input type="checkbox"/>
Total:	<input type="checkbox"/>

10. To what extent do you agree or disagree that the following features of the Scheme encouraged you to register to the Scheme? \*

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure / Not applicable
Key cast cover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure / Not applicable
Civil authority cover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over-70s policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bereavement cover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Any external factors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you chose 'any external' please describe further.

11. To what extent do you agree or disagree that the levels of coverage set by the Scheme were adequate to ensure production could continue? \*

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure / Not applicable
Key cast cover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Civil authority cover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over-70s policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bereavement cover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you have any other comments about the levels of coverage provided by the Scheme?

12. Scheme projects were required to comply with several social commitments, including:

- Not employing people on unpaid internships
- Ensuring all employees are paid the National Living Wage
- Promoting diversity and preventing bullying, harassment and racism
- Where applicable, adhering to the BFI's or a commissioning broadcaster's requirements of policies related to diversity, bullying, harassment and racism
- Publishing workplace diversity targets and prevention-policies for bullying, harassment and racism
- Exploring supporting ScreenSkills funds and offering training

Has your company been able to meet the Scheme's social commitment requirements? \*

Yes

- No
- Prefer not to say

Do you have any comments about how your company met or tried to meet the Scheme social commitments?

### Impact on production activity

13. What proportion of your company's total film and TV production activity between October 2020 and October 2021 would you estimate that your Scheme-registered projects accounted for?

Number of projects

Production budgets

14. What proportion of your company's total film and TV production activity between November 2021 and April 2022 would you estimate that your Scheme-registered projects accounted for?

Number of projects

Production budgets

15. Thinking about your Scheme-registered projects, how likely, on a scale of 0 to 10, would those projects have proceeded at their full budget level in the absence of the Scheme?

0 – Would not have proceeded in any form without the Scheme

5 – There is a 50% chance that the projects would have been able to proceed in the full budget form without the Scheme

10 – Would have proceeded as is even without the Scheme

Projects registered with Scheme on or before 31 October 2021

Projects registered with Scheme after 31 October 2021

### Wider outcomes and impacts

16. To what extent would you agree or disagree with the following statements about how the Scheme impacted your company and projects. \*

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure / Not applicable
The Scheme had a positive impact on my company's overall business confidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure / Not applicable
company's financial sustainability						
The Scheme had a positive impact on my company's ability to resume long-term business planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to create more innovative film and television content than it otherwise would have been able to during the pandemic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to take more risks (eg. with emerging talent) than it otherwise could have during the pandemic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to film projects outside London and the South East	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to pursue projects with higher on-screen values (i.e. production budgets excluding the costs of insuring or self-insuring against COVID-19 risks)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to preserve or increase the number of internships or apprenticeships it could offer during the pandemic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to pursue projects for which	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure / Not applicable
audience uptake may have initially been considered riskier than average						
The Scheme had a positive impact on my company's ability to increase its work with emerging creative talent (eg. writers, directors, actors)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to create new TV formats, rather than simply adopting existing formats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to produce content with a more diverse key creative team (i.e. a team that was more representative of the UK population and audiences) during the pandemic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to produce content with greater on-screen diversity (i.e. storylines and actors that was more representative of the UK population and audiences) during the pandemic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to create content that subsequently generated sales and distribution outside the UK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Scheme had a positive impact on my company's ability to create new TV formats that could be	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Strongly agree      Agree      Neither agree nor disagree      Disagree      Strongly disagree      Not sure / Not applicable

licensed/adopted outside the UK

The Scheme had a positive impact on my company's ability to increase the share of its total turnover earned from international sales and distribution revenue during the pandemic

The Scheme allowed my company to avoid significant costs to mitigate the risks of COVID-19 delays or cancellations

The Scheme meant that a larger share of project financing could be applied 'on-screen' than to mitigating the risks of COVID-19

The Scheme allowed our film and TV projects registered with the Scheme to have higher budgets than they otherwise would have

17. Have you made a claim through the Scheme? \*

- Yes
- No [skip to Q19]
- Prefer not to say [skip to Q19]

18. How many claims have you made through the Scheme? \*

Number of claims paid     

Number of claims in progress     

Number of claims rejected     

Total:     

19. Did your company also make film or TV productions between October 2020 and April 2022 that were not registered for the Scheme (i.e. made outside the Scheme)? \*

- Yes
- No [skip to Q35]
- Prefer not to say [skip to Q35]

**Non-registered projects**

20. Were any of the film and TV projects you attempted to register with the Scheme rejected as ineligible for the Scheme? \*

- Yes
- No
- Prefer not to say

21. How many of your company's film and TV projects filmed between October 2020 and April 2022 were not registered to the Scheme (i.e. made outside the Scheme)? \*

Films - eligible for Scheme but not registered	<input type="text"/>
Films - ineligible	<input type="text"/>
TV programmes - eligible for Scheme but not registered	<input type="text"/>
TV programmes - ineligible	<input type="text"/>
Total:	<input type="text"/>

22. In which genres of production were your projects made outside of the Scheme?

(mark all that apply) \*

	Eligible for Scheme but not registered	Ineligible
Film - fiction	<input type="checkbox"/>	<input type="checkbox"/>
Film - non-fiction	<input type="checkbox"/>	<input type="checkbox"/>
High-end television drama	<input type="checkbox"/>	<input type="checkbox"/>
Continuing drama series (i.e. soap)	<input type="checkbox"/>	<input type="checkbox"/>
Other TV drama	<input type="checkbox"/>	<input type="checkbox"/>
Comedy	<input type="checkbox"/>	<input type="checkbox"/>
Factual/Documentary	<input type="checkbox"/>	<input type="checkbox"/>
Light entertainment / Family	<input type="checkbox"/>	<input type="checkbox"/>

	Eligible for Scheme but not registered	Ineligible
Game/Competition show	<input type="checkbox"/>	<input type="checkbox"/>
Children's TV	<input type="checkbox"/>	<input type="checkbox"/>
Reality television	<input type="checkbox"/>	<input type="checkbox"/>
Talk show	<input type="checkbox"/>	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>	<input type="checkbox"/>

23. What was the total combined value of the production budgets for your company's projects made outside the Scheme? \*

- Less than £250k
- £250k to £499k
- £500k to £999k
- £1m to £1.99m
- £2m to £4.99m
- £5m to £9.99m
- £10m to £19.99m
- £20m to £29.99m
- More than £30m
- Prefer not to say

24. What proportion of all your film and TV projects made between October 2020 and October 2021, would you estimate that your projects made outside the Scheme accounted for?

Number of projects

Production budgets

25. What proportion of all your film and TV projects made between November 2021 and April 2022, would you estimate that your projects made outside the Scheme accounted for?

Number of projects

Production budgets

26. What were the main reasons you did not register specific film and TV projects for the Scheme? \*

	1% Scheme fee period (on or before 31 October 2021)	2.5% Scheme fee period (after 31 October 2021)	Not a reason in either time period
Self-insured	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not required by broadcaster/distributor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fee was too expensive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coverage was insufficient or not suitable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk too low to justify fee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you had other reasons, not specified above, please briefly explain.

27. To what extent did you agree or disagree that the Scheme's compensation model delivery mechanism impacted on your decision not to register specific projects? \*

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Unsure/not relevant

[skip to Q35.]

**Ineligible or never registered**

28. Were any of the film and TV projects you attempted to register with the Scheme rejected as ineligible for the Scheme? \*

- Yes
- No
- Prefer not to say

29. How many film and TV projects did your company produce between October 2020 and April 2022? \*

Films - eligible for Scheme but not registered

Films - ineligible	<input type="checkbox"/>
TV programmes - eligible for Scheme but not registered	<input type="checkbox"/>
TV programmes - ineligible	<input type="checkbox"/>
Total:	<input type="checkbox"/>

30. In which genres of production did your company produce between October 2020 and April 2022?

(mark all that apply) \*

	Eligible for Scheme but not registered	Ineligible
Film - fiction	<input type="checkbox"/>	<input type="checkbox"/>
Film - non-fiction	<input type="checkbox"/>	<input type="checkbox"/>
High-end television drama	<input type="checkbox"/>	<input type="checkbox"/>
Continuing drama series (i.e. soap)	<input type="checkbox"/>	<input type="checkbox"/>
Other TV drama	<input type="checkbox"/>	<input type="checkbox"/>
Comedy	<input type="checkbox"/>	<input type="checkbox"/>
Factual/Documentary	<input type="checkbox"/>	<input type="checkbox"/>
Light entertainment / Family	<input type="checkbox"/>	<input type="checkbox"/>
Game/Competition show	<input type="checkbox"/>	<input type="checkbox"/>
Children's TV	<input type="checkbox"/>	<input type="checkbox"/>
Reality television	<input type="checkbox"/>	<input type="checkbox"/>
Talk show	<input type="checkbox"/>	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>	<input type="checkbox"/>

31. What was the total combined value of the production budgets for your company's projects made between October 2020 and April 2022? \*

- Less than £250k
- £250k to £499k
- £500k to £999k
- £1m to £1.99m

- £2m to £4.99m
- £5m to £9.99m
- £10m to £19.99m
- £20m to £29.99m
- More than £30m
- Prefer not to say
- Enter amount (£)

32. What were the main reasons you did not register for the Scheme? \*

	1% Scheme fee period (on or before 31 October 2021)	2.5% Scheme fee period (after 31 October 2021)	Not a reason in either time period
Self-insured	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not required by broadcaster/distributor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fee was too expensive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coverage was insufficient or not suitable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk too low to justify fee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you had other reasons, not specified above, please briefly explain.

33. To what extent did you agree or disagree that the Scheme's compensation model delivery mechanism impacted on your decision not to register for the Scheme? \*

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree
- Unsure/not relevant

34. To what extent would you agree or disagree with the following statements about how your company and its film and TV projects performed between October 2020 and April 2022? \*

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Unsure / Not relevant
My company's overall business confidence increased	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company's financial sustainability increased	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company's ability to resume long-term business planning improved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Unsure / Not relevant
My company increased its ability to create more innovative film and television content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to take more risks (eg. with emerging talent)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to film projects outside London and the South East	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to pursue projects with higher on-screen values (i.e. production budgets excluding the costs of insuring or self-insuring against COVID-19 risks)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company preserved or increased the number of internships or apprenticeships it could offer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to pursue projects for which audience uptake may have initially been considered riskier than average	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to work with emerging creative talent (eg. writers, directors, actors)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to create new TV formats, rather than simply adopting existing formats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to produce content with a more diverse key creative team (i.e. a team that was more representative of	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Unsure / Not relevant
the UK population and audiences)						
My company increased its ability to produce content with greater on-screen diversity (i.e. storylines and actors that was more representative of the UK population and audiences)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to create content that subsequently generated sales and distribution outside the UK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased its ability to create new TV formats that could be licensed/adopted outside the UK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company increased the share of its total turnover earned from international sales and distribution revenue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My company was able to avoid significant costs in mitigating the risks of COVID-19 delays or cancellations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Other COVID-19 support from Government**

35. Have you sought any other sources of financial support -- Government or otherwise -- because of the COVID-19 pandemic and its impact on film and TV production? \*

	Yes	No
Coronavirus Job Retention Scheme	<input type="checkbox"/>	<input type="checkbox"/>
Self-Employment Income Support Scheme	<input type="checkbox"/>	<input type="checkbox"/>
Coronavirus Business Interruption Loan Scheme	<input type="checkbox"/>	<input type="checkbox"/>
Recovery Loan Scheme	<input type="checkbox"/>	<input type="checkbox"/>
Kickstart Scheme	<input type="checkbox"/>	<input type="checkbox"/>

Yes

No

Other (please list below)

Please list any other forms of support not listed above.

**Final comments**

36. Do you have any other comments on the Scheme, the impact of the pandemic on film and TV production in the UK or the role of the Government in mitigating the risks of COVID-19 in the UK's production industry?

## 10. Appendix E: Economic impact ratios

**Table A - 3 Screen Business 2021 film and HETV production economic impact**

	2016	2017	2018	2019
Film and HETV production spending (£m)	2,849	3,447	3,452	4,094
Employment (FTEs)				
Direct	33,920	40,300	38,570	46,530
Indirect	21,370	25,690	24,310	29,170
Induced	13,810	16,480	15,700	18,920
<b>Total</b>	<b>69,100</b>	<b>82,470</b>	<b>78,580</b>	<b>94,620</b>
GVA (£m)				
Direct	1,506	1,805	1,803	2,103
Indirect	912	1,106	1,070	1,191
Induced	605	728	719	824
<b>Total</b>	<b>3,023</b>	<b>3,640</b>	<b>3,593</b>	<b>4,118</b>

Source: BFI (2021) Screen Business

**Table A - 4 Economic impact ratios**

	2016	2017	2018	2019	2020	2021
Employment (FTEs per £1m spend)*						
Direct	11.9	11.7	11.2	11.4	10.4	10.3
Indirect	7.5	7.5	7.0	7.1	7.1	6.9
Induced	4.8	4.8	4.5	4.6	4.6	4.5
<b>Total</b>	<b>24.3</b>	<b>23.9</b>	<b>22.8</b>	<b>23.1</b>	<b>22.0</b>	<b>21.6</b>
GVA (£m per £1m spend)						
Direct	0.53	0.52	0.52	0.51	0.51	0.51
Indirect	0.32	0.32	0.31	0.29	0.29	0.29
Induced	0.21	0.21	0.21	0.20	0.20	0.20
<b>Total</b>	<b>1.06</b>	<b>1.06</b>	<b>1.04</b>	<b>1.01</b>	<b>1.01</b>	<b>1.01</b>

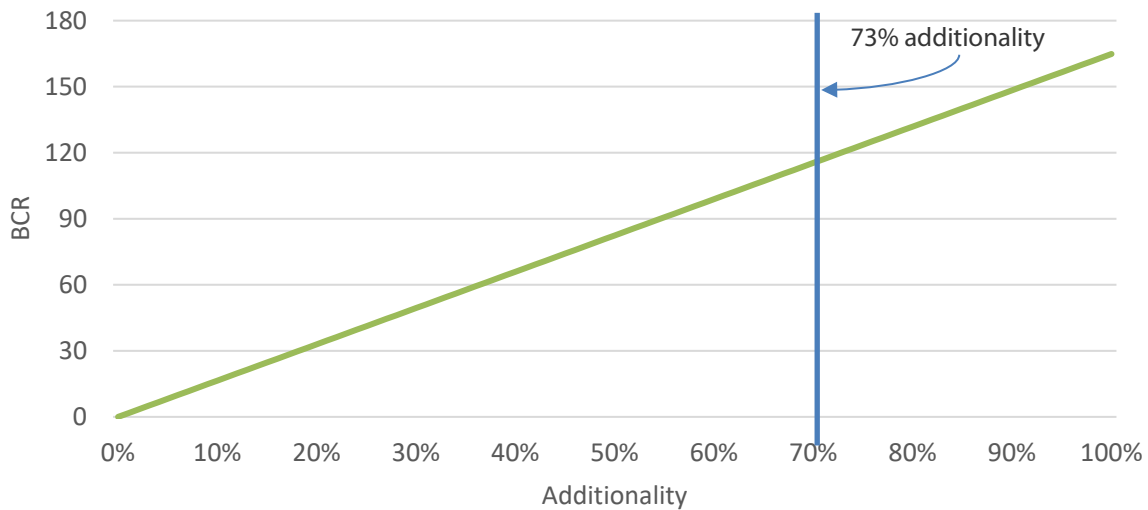
Source: Nordicity / Saffery Champness calculations based on data from BFI (2021) Screen Business

\* Employment impact ratios have been adjusted by wage-cost inflation for 2020 and 2021

## 11. Appendix F: Sensitivity analysis

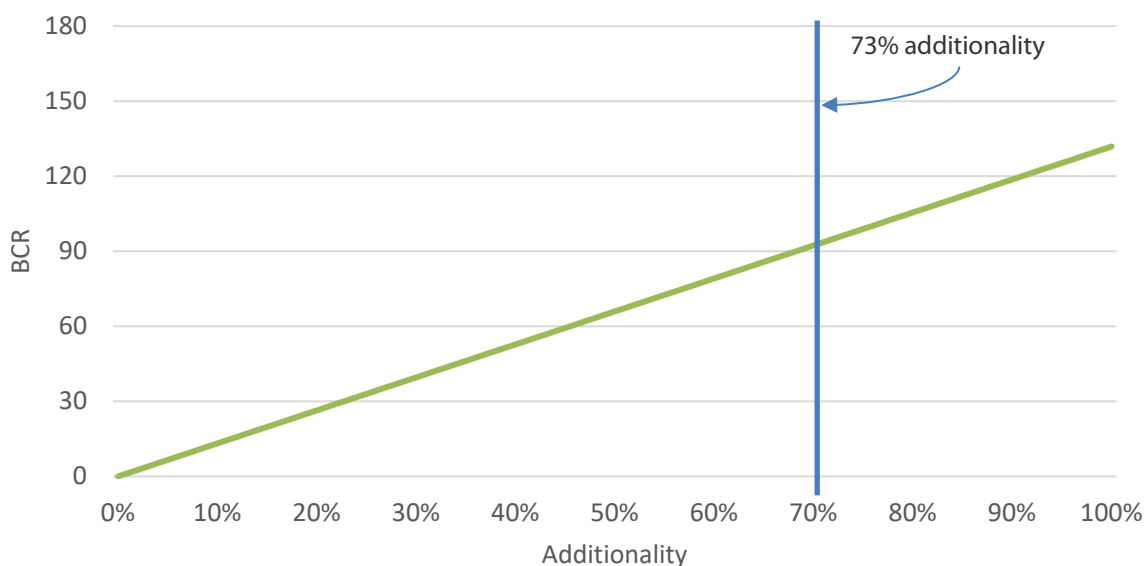
The sensitivity analysis in this appendix shows how the Scheme BCR varies as the rate of additionality – which is the key uncertain variable within the analysis – varies from 0% to 100%. This sensitivity analysis reveals that the economic benefits generated by the Scheme are such that the BCR would still be breakeven (i.e.  $\geq 1:1$ ) at very low rates of additionality (i.e. 1% 2% additionality).

**Figure A - 1 Benefit-cost ratio vs. additionality rate, including collected registration fees, total economic impacts**



Source: Nordicity / Saffery Champness calculations based on data from DCMS, Marsh Commercial, BFI *Screen Business 2021*, producer survey (2022) and ONS

**Figure A - 2 Benefit-cost ratio vs. additionality rate, including collected registration fees, direct + indirect economic impacts only**



Source: Nordicity / Saffery Champness calculations based on data from DCMS, Marsh Commercial, BFI *Screen Business 2021*, producer survey (2022) and ONS

### **Nordicity**

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