

The impact of direct public funding for film and television in the UK

Prepared for Pact

March 2025





About the authors

alma economics



Alma Economics combines unparalleled analytical expertise with the ability to communicate complex ideas clearly.

www.almaeconomics.com

About the commissioning organisation

pact.

Pact is the UK screen sector trade body representing and supporting independent production and distribution companies.

www.pact.co.uk

Table of Contents

Executive summary	1
Introduction to the research	4
Background and context.....	4
Analytical approach	5
Structure of the report	6
Direct public production and development funding in the UK	7
Summary.....	7
Northern Ireland focused funding	8
Scotland focused funding	9
Wales focused funding.....	10
Funding in the English regions	11
UK-wide funding	12
Summary findings	15
Review of economic and cultural impacts of direct public funding for film and television	22
Annex B: Technical Annex.....	39
Economic model workings	39
Input data and assumptions	39

List of Tables

Table 1.	Economic impact of direct public funding for film and television	3
Table 2.	Summary of public funds by nation.....	7
Table 3.	Funds identified in Northern Ireland.....	8
Table 4.	Scottish funds identified	9
Table 5.	Funds identified in Wales.....	10
Table 6.	Funding identified in the English regions.....	11
Table 7.	UK and England-wide funds identified	13
Table 8.	Economic impact of direct public funding for film and television	16
Table 9.	Direct economic activity by nation – production sector	19
Table 10.	Full value chain impacts	22
Table 11.	Funds relevant to Northern Ireland	29
Table 12.	Funds relevant to Scotland.....	31
Table 13.	Production sector economic multipliers	42

List of Figures

Figure 1.	Total production budget, and budget remaining in the UK by nation	18
Figure 2.	Share of funding awarded to domestic productions, co-productions, and inward investment productions by nation.....	19
Figure 3.	Annual UK and non-UK production spend (£m), by production type	20
Figure 4.	Total economic impact per £1 of production spend by production type	21

Executive summary

Alma Economics was commissioned by Pact to analyse the contribution of direct public production funding to the UK economy. The findings presented in this report were derived through the following research activities:

- A comprehensive desk-based review to map the UK's ecosystem of public funding for film and television,
- A series of semi-structured interviews with film and television producers who have previously benefited from public support, and
- Economic modelling to estimate the economic contribution of direct public funding to the UK.

There is an established ecosystem of direct public funding for film and television in the UK, although access varies by geography

We identified 30 relevant sources of direct public funding for film and television productions across the UK, largely supporting production and development. Most funds offered specific support to productions in specific regions or nations, with those offering UK-wide funding primarily administered by the BFI. The availability of public production and development funds was not found to be evenly spread across geographies, with levels of available funding varying substantially across the UK's nations and regions. Northern Ireland was found to be an outlier, investing the most of any nation in direct public funding, equating to over £13.60 invested per capita. Recent projects supported by direct production funds include the BAFTA-winning Irish-language film *Kneecap*¹ supported by Northern Ireland Screen, the recently aired ITV mini-series *Out There*² set in rural Wales and supported by Creative Wales and the HBO mini-series *The Regime*³, supported by Screen Yorkshire.

Mechanisms through which direct public funding generates impact

We found that public production funds generate economic value through the following mechanisms:

- **Their key role in leveraging indirect public and private sector funding**, ensuring that film and television productions get financed and made when they otherwise would not have been. Particularly for productions with smaller budgets and without major studio backing, we understand that securing direct public funding is often a necessary first step in securing financing for a film or television production, giving other financiers – such as broadcasters and distributors, amongst others – the confidence to invest (supported productions typically also claim relevant tax credits).
- **This supports additional film and television production spend**, which generates direct GVA and employment in the UK on these productions. This additional activity supports increased economic activity through supply chains (indirect economic impact), as well as underpinning the wider film and television value chain (including distribution, exhibition, video on demand, etc). A key assumption of our economic modelling, informed by our literature review and interviews with producers, is that domestic productions and co-productions have a higher estimated rate of additionality compared with inward investment productions. This reflects our understanding that securing direct public funding is often the key first step in securing financing for domestic and co-

¹ Kneecap nominated for six BAFTA awards, Northern Ireland Screen 2025. See: <https://northernirelandscreen.co.uk/news/irish-film-kneecap-nominated-for-6-bafta-awards/>

² The Welsh thriller starring Martin Clunes, Creative Wales 2025. See: <https://www.creative.wales/welsh-thriller-starring-martin-clunes>

³ The Regime, Screen Yorkshire, n.d. See: <https://www.screenyorkshire.co.uk/funding/productions/the-regime/>

productions, giving other financiers the confidence to invest in the production against the backdrop of substantial risk. On the other hand, we understand that inward productions would typically have already secured financial backing from a major studio, meaning that other factors are more important for inward investment productions basing themselves in the UK.

- **There are wide-ranging economic and cultural spillovers associated with film and television production.** Previous analysis from Alma Economics estimated that low budget films support the launching of new filmmaking talent, whilst there is an established evidence base on other spillover benefits such as cultural value generation and screen tourism.

Direct public funding makes a valuable economic contribution to the UK economy

This report provides new quantitative estimates of the contribution of direct public funding for film and television production for the UK economy. Our analysis finds that direct public production funding generates substantial additional economic activity for the UK. Key findings include that:

- Direct public funding was found to support a mix of production types, including domestic productions (64% of total funding), co-productions (12% of total funding), and inward investment productions (25% of total funding).
- The estimated £56m of direct public funding dispensed annually supports around £258m in film and television production spend in total (UK and non-UK spend). This represents around £4.60 of total production spend supported for every £1 of public investment.
- Our analysis suggests that the majority of this spend is awarded to scripted film and television productions rather than unscripted content. Unscripted projects were found to be explicitly excluded from eligibility for some funds, including BFI Impact and Discovery Funds, whilst the balance of support provided by funds overall was found to be largely targeted toward scripted productions. Despite this, some unscripted projects have been supported. These have ranged from factual television series such as the children's cooking show *Cooking with the Gills*⁴ and *Peninsula Nurses*⁵, focused on nurses and first responders in the Ards Peninsula in Northern Ireland, to creative documentaries such as *Hockey*⁶, detailing the early life of artist David Hockney, and *Bogancloch*⁷, following the daily routines of a man living off-grid in the Clashindarroch Forest in Scotland.
- Of the £258m of supported film and television production spend, around £190m (74%) of that spend is estimated to remain in the UK. This represents around £3.40 of UK production spend for every £1 of public investment. This reflects that not all spend supported by direct public funds remains in the UK, particularly on inward investment and co-productions where much of the total budget may be spent on activities abroad.
- UK production spend supported by direct public funding is estimated to contribute £66m in additional direct GVA for the UK economy, representing around £1.20 for every £1 of public investment.

⁴ New C5 cooking show launches, produced by regional based MCC Media, North East Screen 2022. See: <https://northeastscreen.org/new-c5-cooking-show-launches-produced-by-regional-based-mcc-media/>

⁵ A new Ulster-Scots series follows the peninsula nurses working across the local community, Northern Ireland Screen, 2023. See: <https://northernirelandscreen.co.uk/news/ulster-scots-broadcast-fund/a-new-ulster-scots-series-follows-the-peninsula-nurses-working-across-the-local-community/>

⁶ Hockney, Screen Yorkshire, n.d. See: <https://www.screenyorkshire.co.uk/funding/productions/hockney/>

⁷ Bogancloch: Ben Rivers' glorious new film continues his fascination with Scottish forest-dweller, BFI 2024. See: <https://www.bfi.org.uk/sight-and-sound/reviews/bogancloch-ben-rivers-glorious-new-film-continues-his-fascination-with-scottish-forest-dweller>

- When also considering indirect, induced, and spillover effects, UK production spend supported by direct public funding is estimated to contribute £149m in total GVA to the UK economy, representing around £2.70 for every £1 of public investment.
- We estimate that the potency of direct public funding for film and television production varies by production type, with the total economic impact per £1 of public investment higher for domestic productions (£3.30) and co-productions (£2.60) than for inward productions (£1.10).
- The additional production activity underpins an extensive film and television value chain – spanning production, sales and distribution, broadcasters, cinemas, VOD platforms, amongst other market constituents. Our analysis estimates that every £1 of direct public funding supports around £4.40 of total GVA across the film and television full value chain.
- Our review of evidence identified a range of further economic and cultural spillovers associated with public support for film and television production, including screen tourism, the development of new talent, and the generation of cultural value.

Table 1. Economic impact of direct public funding for film and television

	Direct public funding (£m)			
Direct public funding	56			
	Production spend (£m)	Production spend per £1 of public investment		
Total production budgets supported (UK and non-UK)	258	4.60		
UK production budgets supported	190	3.40		
	Additional GVA (£m)	Additional GVA (£m) per £1m of public investment	Additional FTEs	Additional FTEs per £1m of public investment
Direct economic impact (production only)	66	1.2	1,310	23
Total economic impact (production only)	149	2.7	2,890	52
Direct economic impact (full value chain)	118	2.1	2,780	50
Total economic impact (full value chain)	247	4.4	3,140	56

Source: Alma Economics estimates, 2025

Introduction to the research

Alma Economics was commissioned by Pact to analyse the economic impact of direct public production funding in the UK. The analysis in the report is based on an assessment of existing publicly available information on the funds, collated and combined with sector-specific data from the British Film Institute and other sources to create estimates of the economic effect within the production sector, as well as across the wider value chain. In addition to presenting the economic impact of public funds across each nation, we have also mapped the landscape of existing funds and collated evidence on the wider impacts of public funds, on factors such as culture, tourism, and support for emerging talent.

Background and context

Independent film and television production is a key component of the UK's screen sector ecosystem, underpinning the UK's thriving large-budget film and high-end television industries by acting as a platform for creative risk-taking and innovation, whilst playing a significant role in developing emerging on- and off- the screen talent.⁸ Despite this, An Economic Review of Independent Film (Alma Economics, 2022)⁹ highlighted the recent challenges domestic and independent production companies have been facing when seeking to secure finance, against a backdrop of declining traditional revenue sources and rapidly increasing costs (coupled with skills shortages), which together have been increasing the financial risk of investing in independent production.

An established ecosystem of publicly funded sources of finance exists to promote production activity in the UK, with some focusing on specific geographies within the UK or on specific genres or types of content. For the purposes of this study, we define direct public funding as application-based production and development funding sources, administered primarily by public bodies. It should be noted that forms of indirect public funding, such as tax credits and broadcaster contributions funded through the television license fee, have been excluded from this analysis, although they also represent valuable sources of funding for UK-based film and television production and development.

Whilst previous research has sought to quantify the impact of the screen sector overall or the contribution of other screen sector policies, such as the UK tax credit (Screen Business, 2021),¹⁰ this study expands the evidence base by providing the first comprehensive mapping and analysis of the impact of direct public funding for film and television in the UK.

⁸ Measuring the Spillover Benefits of Independent Film, Alma Economics, 2023. See: <https://www.pact.co.uk/static/a6b60ff1-3044-4495-b14db0559e5c367f/2f313373-baaa-492a-92cb97ba2ca0bf54/Measuring-the-Spillover-Benefits-of-Independent-Film-2023-Alma-Economics.pdf>

⁹ Economic Review of UK Independent Film, Alma Economics, 2022. See: <https://www.bfi.org.uk/industry-data-insights/reports/economic-review-uk-independent-film>

¹⁰ Screen Business 2021, Olsberg SPI with Nordicity, 2021. See: <https://www.bfi.org.uk/industry-data-insights/reports/uk-screen-sector-economy>

Analytical approach

1. Mapping the landscape for direct public funding

Our research was underpinned by a desk-based evidence review and a web search to identify relevant development and production funds supporting UK film and television productions. A list of such funds was compiled, taking note of key funding attributes such as:

- Total funds available,
- Amounts awarded to individual projects,
- Eligibility criteria,
- Types of activities supported, and
- Notable projects.

This information was sourced from a range of sources including the funder annual reports and financial statements, individual fund guidelines for applicants, and information available on funder websites.

2. Reviewing existing evidence on the impact of direct public funding

Once we had developed a complete picture of the direct public funding landscape in the UK, we conducted a review of existing evidence on the impact of public funds in each UK nation and region. This included existing evidence of the economic impacts (such as local gross value added and employment) and wider impacts (such as screen tourism, skill growth and talent incubation, and wider cultural impacts) promoted by the funds. The evidence we used to analyse qualitative impacts came primarily from industry reports and journalistic sources. While some existing evidence of these impacts was identified, there was incomplete evidence for many funds, and the evidence was anecdotal in many instances. In general, the level of information available about each fund varied significantly, and many were not fully transparent in their methodologies, making assessment of the robustness of the evidence challenging.

3. Modelling the economic benefits of direct public funding

To evidence the economic contribution of direct public funding for film and television, we conducted an economic modelling exercise, which was aligned with HM Treasury Green Book principles and underpinned by the best available evidence. In line with the Green Book, we estimated the economic impact directly generated by support for film and television production. To illustrate wider impacts through supply chains from additional production activity, we also estimated the indirect benefits. The production sector plays a crucial role in supporting a wider screen sector ecosystem, and so our modelling also presents estimates of the economic impact of support for the wider screen sector value chain (including sales, distribution, exhibition, video-on-demand, etc). In all cases, the streams of economic benefits that we modelled included:

- Additional Gross Value Added (commonly referred to as GVA) for the UK, a measure of additional productivity,
- Additional employment generated,
- Wider economic spillover benefits, such as the launching of new creative talent and screen tourism.

To estimate the total investment by production funds in the UK we analysed the database compiled as part of the earlier desk-based review. In order to identify impacts by production type, we analysed a sample of recently supported projects to determine what share of support from each fund was going toward domestic productions, co-productions, and inward investment productions respectively. To understand the share of total production budgets supported by direct public funds, we used two sources. First, we used data from the European Audiovisual Observatory on the average share of production budgets supported by public funds. We then adjusted the EAO figures using inputs from producers on what share of their production budgets was supported by direct public funds. This figure was summed and multiplied by total fund spend, to estimate the total production activity supported by each fund in each nation. We then estimated how much of this production spend remained in the UK, using data from the BFI.

In addition to data collected through the desk-based review, we carried out five targeted interviews with production companies who had been supported by direct public funds, to understand the extent to which (i) their productions would have gone ahead without direct public funding, (ii) how the funding influenced the scale or scope of their productions, and (iii) if receipt of funding influenced their decision to base their production in a specific region or nation.

An economic model was then developed to estimate the direct and total economic impacts of production and wider value chain activity generated by direct public funds. The model incorporated the data on production activity compiled above, informed assumptions taken from interviews with production companies, and data compiled from previous data publications and research. The economic impact of the funds has been analysed in several ways, focusing on how impacts accrue to each nation, and taking into account different parts of the value chain. Our full approach to the economic modelling can be found in Annex B.

Structure of the report

The report is structured as follows:

- Section 1 provides a comprehensive mapping of funds by nation of the UK and;
- Section 2 provides our analytical findings, covering the economic and cultural impacts of public funds.

The main body of the report is followed by two appendices, (i) outlining the full list of funds identified by the research, and (ii) our full technical approach to quantifying the economic impact of the funds.

Direct public production and development funding in the UK

Summary

In total, we identified 30 sources of direct public funding for film and television productions in the UK. In general, the funds we identified supported production or script and slate development, with a few funds being less prescriptive and instead offering more general business support to start-up or independent production companies.¹¹ The 30 funds we identified were targeted as follows, with a detailed summary of each fund described in Annex A:

- Six exclusively supported development activities,
- 14 supported content production,
- Seven supported both content production and development,
- Three provided support for a wider range of activities (e.g., investment in infrastructure or new business development) undertaken by production or screen sector companies.

The following table presents the count of direct public funds by nation, as well as the estimated annual total investment, with additional detail provided in the following sections.

Table 2. Summary of public funds by nation

	Count of direct public production and development funds	Estimated total annual investment (£m)	Per capita investment in direct public funds (£)
Northern Ireland focused	4	24.5	13.6
Wales focused	7	11.3	3.6
England focused	7	10.7	0.2
Scotland focused	3	9.5	1.8
UK- or England-wide focus	9	8.2	0.1 ¹²
Total	30	64.2	0.9

Source: Alma Economics analysis, 2025

The table above highlights Northern Ireland (at £13.6 per capita) as an outlier in terms of its relatively high aggregate and per capita public investment in film and television production. England has the lowest investment per capita (at £0.20 per capita), highlighting the inconsistency of the availability of public funding across the nations and regions. The direct public funds we identified varied in their geographic focus, and by whom they were administered or dispersed:

¹¹ Public funding for initiatives not directly related to film and television production and development activity – such as skill development or environmental initiatives – were not in scope for this review.

¹² We use the UK-wide population for our estimate of per capita investment in direct public funds with a UK or England wide focus. This may not be fully representative of the funds in this category.

- Ten funds identified were administered by the national screen agencies: Ffilm Cymru Wales, Screen Scotland, and Northern Ireland Screen.
- In Wales specifically, three funds were also administered by Creative Wales, the Welsh Government agency overseeing the creative industries.
- In England, seven funds identified not linked to a specific region were administered by the BFI; two were administered by BFI NETWORK and one fund identified was administered by the BBC.
- Four funds were administered by regional screen agencies (Screen Yorkshire and North East Screen), one fund was administered by a local film office (Liverpool Film Office), and two were administered by Creative UK, serving the West Midlands specifically.

While some English regions have dedicated funds, most do not, and the level of funding available also varies substantially across the nations. As well as there being considerable variation in the spread of available funds across the nations and regions, there was also variation in the terms and conditions associated with the funding, with some funds being awarded conditional on adhering to a specific spend ratio in the region, others requiring the funding body be given a production credit, and others requiring funds to be 100% recoupable, and asking for a share of the profits made from the film. We understand that most screen agencies and film offices are funded primarily by public agencies, although we are aware that Screen Yorkshire operates on a commercial basis, with no public moneys invested through their content fund.

Funds were also found to vary in the production genres they support. Most funds in scope supported both unscripted and scripted projects, although our analysis suggests that the majority of this spend is awarded to scripted film and television productions. Unscripted projects were explicitly out of scope for some funds, including BFI Impact and Discovery Funds, whilst the Creative Wales Production Fund explicitly offers a lower maximum funding amount for unscripted projects compared with scripted projects (less than half of the amount).

The following section provides a more detailed summary of the public funding landscape in each nation and region, with a full, detailed list of funds provided in Annex A.

Northern Ireland focused funding

All of the funds identified as relevant to Northern Ireland were administered by Northern Ireland Screen. The table below shows the full list of funds identified, with additional detail on the activities they support provided below.

Table 3. Funds identified in Northern Ireland

Fund name	Estimated annual awards (£m)
NI Screen Production Fund	17.6
Irish Language Broadcast Fund	3.2
NI Screen Development Fund	2.8
Ulster Scots Broadcast Fund	0.9
Total	24.5

Source: Alma Economics analysis, 2025

The following public funds operate in Northern Ireland:

- **Northern Ireland Screen Production Fund**, which provides support to feature films, television drama, animation, factual entertainment television and productions in Northern Ireland or undertaken by Northern Irish teams. Based on data on funding decisions from Northern Ireland Screen from 2022/23, production investment ranged from £4m to £10k per project.
- **Northern Ireland Screen Development Fund**, providing general support for development of film and television projects to Northern Irish companies and writers. Investment in development projects ranged from £100k to £7.5k. Slate and project development funding is available for feature film and television projects of all genres, including pilots.
- **Irish Language Broadcast Fund**, which provides support to single or slate broadcast projects with at least 75% of dialogue in the Irish Language. Both scripted and unscripted projects are eligible for funding under the Irish Language Broadcast Fund.
- **Ulster Scots Broadcast Content Fund** which supports single or slate broadcast projects focused on Ulster Scots culture. Both scripted and unscripted projects are eligible for funding under the Ulster Scots Broadcast Content Fund.

Across all four funds, Northern Ireland Screen invested close to £25m in production and development funding, the largest investment in public funds of any of the UK nations, equating to more than £13 per capita in direct public investment, compared to £0.20 per capita in England, almost £2 per capita in Scotland, and around £3.60 per capita in Wales.

Northern Ireland Screen is primarily funded by the Northern Ireland Department for the Economy, the Department for Communities, and the British Film Institute on behalf of the Department for Digital, Culture, Media, and Sport.

Scotland focused funding

Screen Scotland operates three development or production funds in Scotland, the **Film Development and Production Fund**, the **Broadcast Content Fund**, and the **Production Growth Fund**. The total investment of each fund is presented in the table below.

Table 4. Scottish funds identified

Fund name	Estimated annual awards (£m)
Screen Scotland Production and Development Fund	4.5
Screen Scotland Production Growth Fund	3.0
Screen Scotland Broadcast Content Fund	2.0
Total	9.5

Source: Alma Economics analysis, 2025

Each fund operated by Screen Scotland targets a different activity:

- **The Film Development and Production Fund**, supports production and development activity in Scotland or by Scottish companies. Based on fund application guidance published by Screen Scotland, development awards range from £3k to £50k, while production awards can be as high as £500k. The fund supports both scripted and documentary projects.

- **The Broadcast Content Fund** supports the development and production of content intended for commercial distribution or broadcast. The fund supports both scripted and documentary projects.
- **Production Growth Fund**, which aims to bring large international productions into Scotland, has investments ranging from £200k to £500k, with a minimum Scottish spend ratio of 10:1.¹³ The fund supports animated and live-action features, as well as live-action and animated high-end TV, and factual returnable series.

Screen Scotland sits within Creative Scotland and is funded by the Scottish Government and National Lottery Funding.

Wales focused funding

There are several production and development funds operating in Wales, administered primarily by Ffilm Cymru Wales, and Creative Wales, with some funds administered in partnership with other organisations such as BFI NETWORK, and S4C. The table below summarises these funds.

Table 5. Funds identified in Wales

Fund name	Estimated annual awards (£m)
Creative Wales Production Fund	6.0
Sinema Cymru Film Fund	2.0
Ffilm Cymru Wales Feature Film Production Fund	1.6
Creative Wales Development Fund	1.0
Creative Wales Young Content Fund	0.3
Ffilm Cymru Wales Development Fund	0.3
Beacons Short Film Fund	0.1
Total	11.3

Source: Alma Economics analysis, 2025

Ffilm Cymru Wales operates four development funds, either independently or in partnership with other Welsh organisations:

- **The Ffilm Cymru Wales Feature Film Production Fund**, provides investment ranging from £150k to £600k per project, targeted at feature-length projects. The fund supports both scripted and unscripted projects.
- **The Ffilm Cymru Wales Development Fund** ranges from £10k to £24,999 per project. The fund supports both scripted and unscripted projects.

¹³ E.g., for Screen Scotland to invest £200,000, the production must commit to spending at least £2m on pre-production, principal photography, visual effects, or post-production within Scotland.

They also co-administer the **Sinema Cymru Fund** in partnership with S4C and Creative Wales, which provides support to Welsh language films in particular. No additional information was found on the eligibility of films by genre.

- **The Beacon Short Film Fund**, administered on behalf of BFI NETWORK provides support for short films specifically. Live-action, animation, and documentary films are all eligible for support.

In addition to the funding offered by Ffilm Cymru Wales, Creative Wales also administers a production fund, a development fund, and a Young Content Fund:

- The **Creative Wales Production Fund** provides up to £750k per project in production funding, with a total estimated investment of £6m. Scripted projects are eligible for up to £750k in funding, while unscripted projects are eligible for awards of up to £300k.
- The **Creative Wales' Development Fund** offers up to £25k per project, with a total estimated investment of £1m. The most recent funding round had a specific focus on unscripted development projects and entertainment formats.
- The **Young Content Fund** specifically supports the development and production of Welsh Language content for children and young people. The fund supports projects across all genres, including education, arts & culture, and factual.

Creative Wales is an agency of the Welsh Government, while Ffilm Cymru Wales is publicly funded, with production and development funds supported by the National Lottery Fund, delegated via the Arts Council of Wales, and Welsh Government funds delegated via Creative Wales.

Funding in the English regions

Our review identified a handful of funds with support specific to certain English regions, detailed in the table below. Most regions of England do not have dedicated development or production funds, instead relying on England-wide funding.

Table 6. Funding identified in the English regions

Fund name	Estimated annual awards (£m)
North East Screen Production Fund	3.8
Liverpool City Region Production Fund	3.0
West Midlands Production Fund	2.1
Yorkshire Content Fund	1.8
North East Screen REACH Fund	No data available
North East Screen REACH Plus Fund	No data available
West Midlands IP Content Fund	No data available
Total	10.7

Source: Alma Economics analysis, 2025

Funding identified specific to certain regions in England is delivered by regional screen agencies (specifically Screen Yorkshire and North East Screen), Creative UK, and one local film office – Liverpool Film Office. North East Screen, Liverpool Film Office, and Creative UK are all publicly funded, while Screen Yorkshire operates commercially. Specifically:

- The **Yorkshire Content Fund**, administered by Screen Yorkshire, which provides investment for television, film, and video games of up to £500k to producers based in Yorkshire or open establishing a base in the region. Screen Yorkshire is a commercial screen agency and so invests no public monies in the Yorkshire Content Fund. Guidelines for the fund state that Yorkshire Content Fund will charge an arrangement fee along with a backend premium and a share of profits, and that the Yorkshire Content Fund is unlikely to invest in any project where there is not a clear path to recoup their investment. No information about the eligibility of unscripted projects is provided in the guidelines of the fund, but based on a range of recently supported projects, the fund supports both unscripted and scripted productions.
- **North East Screen Production Fund**, which provides funding of up to £500k for productions with a significant portion made in the North East. No information about the eligibility of unscripted projects is provided in the guidelines of the fund, but based on a range of recently supported projects, the fund supports both unscripted and scripted productions.
- North East Screen also provides wider business support to SME production companies and other screen-sector businesses through the **REACH** and **REACH Plus** funds. REACH offers grants of up to £5k to screen-sector companies to support business and product development. Similarly, REACH Plus offers larger grants (up to £25k) to screen sector businesses with a strong track record of working with commissioners and broadcasters.
- The **Liverpool City Region Production Fund**, which supports the production of feature films, television dramas, animation, and scripted comedy series, based in Liverpool. The fund invests £100k- £500k per project, using investment from Liverpool City Council and the Liverpool City Region Combined Authority. Live action, animated and documentary feature films are eligible for support. Unscripted television is not eligible for support.
- Creative UK also administers the **West Midlands Production Fund**, which reinvests recouped finance to support production activity in the West Midlands, with investments between £100k to £500k. No information about the eligibility of unscripted projects is provided in the guidelines of the fund, but all recently supported projects sampled in the research were scripted.
- Creative UK has also recently launched the **West Midlands IP Content Fund**, in collaboration with Create Central, to support the development of original IP from West Midlands creative sector companies.

UK-wide funding

There are a number of public funds open to productions across England or the UK, with most of these being administered by the British Film Institute (BFI). The table below shows the full list of non-geographically constrained funds available, with the estimated investment per year of each fund, with a more detailed description provided below.

Table 7. UK and England-wide funds identified

Fund name	Estimated annual awards (£m)
BFI UK Global Screen Fund: International Co-Production	2.8
BFI Development Funding	1.4
BBC Small Indies Fund	1.0
BFI Discovery Funding	1.0
BFI Doc Society Features Fund	0.8
BFI Impact Funding	0.7
BFI NETWORK England Short Film Funding	0.4
BFI Doc Society Short Film Fund	0.2
BFI NETWORK Early Development Fund	No data available
Total	8.3

Source: Alma Economics analysis, 2025

In terms of production funding, the BFI supports three funds:

- **The Discovery Fund**, which supports first time directors with their debut feature, providing up to £1m in support. Documentary films are not eligible for support under the Discovery Fund.
- **The Impact Fund** offers support to more experienced directors, or debut directors with budgets above £3.5m, providing up to £1.25m in support per year. Documentary films are not eligible for support under the Impact Fund.
- The BFI also offers specific support to UK producers looking to work on co-productions through the International Co-Production strand of the **UK Global Screen Fund**. The Fund provides grant funding of up to £300k to co-productions where the UK producer is a minority co-producing partner.

The BFI also supports a few development funds, and funds targeting short films specifically:

- The **BFI Development Fund**, the BFI offers funding to original live-action and animation feature films, to support formal development. Awards can range from £1.5k to £50k.
- BFI NETWORK England also provides **Early Development Funding**, providing grants to writers based in England with first draft scripts for their debut feature film. Documentary or unscripted projects are not eligible for support under the fund.
- The **BFI NETWORK England Short Film Fund** supports short fiction films, up to 15 minutes in length, with investments between £5k and £25k. Documentary projects are not eligible for support under England Short Film Funding.

Despite the funds being open to production companies or individuals across England, the distribution of funding is still unbalanced, with over 70% of funding in 2023/24¹⁴ being awarded to projects in London. While companies supported are overwhelmingly concentrated in London, a previous Alma Economics evaluation of the BFI Film Fund found that primary shoot locations of funded productions were much more geographically dispersed, with more representation across the regions and nations, suggesting the Film Fund may still be generating production activity outside of London.

The BFI also offers genre-specific financial support to documentaries, in partnership with Doc Society, including:

- The **BFI Doc Society Features Fund**, which provides funding to independent feature documentary films intended for theatrical release, with non-recoupable grants ranging from £25k to £150k, provided in stages.
- The **BFI Doc Society Made of Truth Short Film Fund**, which provides grants of up to £25k to up to 15 short documentaries annually.

In addition to the support provided by the BFI, the BBC also provides general support to small, independent production companies through the **Small Indie Fund**. This fund ringfences £1m to support production companies with turnovers of less than £10m.

¹⁴ Funding awards made by the BFI, April 2023 to March 2024. See: <https://www.bfi.org.uk/funding-awards-made-bfi>

The impact of direct public funding in the UK

Summary findings

In this section we provide new quantitative estimates of the contribution of direct public funding for film and television production for the UK economy. Our analysis finds that direct public production funding generates substantial additional economic activity for the UK. Key findings include that:

- The estimated £56m of direct public funding dispensed annually supports £258m in film and television production spend in total. This represents around £4.60 of production spend supported for every £1 of public investment. Our analysis suggests that the majority of this spend is awarded to scripted film and television productions, although unscripted productions are also supported by these funds¹⁵.
- Of the £258m of supported film and television production spend, around £190m (74%) is estimated to be spent in the UK. This represents around £3.40 of UK production spend for every £1 of public investment.
- UK production spend supported by direct public funding is estimated to contribute £66m in additional direct GVA for the UK economy, representing around £1.20 for every £1 of public investment.
- When also considering indirect, induced, and spillover effects, UK production spend supported by direct public funding is estimated to contribute £149m in total GVA to the UK economy, representing around £2.70 for every £1 of public investment.
- We estimate that the potency of direct public funding for film and television production varies by production type, with the total economic impact per £1 of public investment higher for domestic productions (around £3.30) and co-productions (around £2.60) than for inward productions (around £1.10).
- The additional film and television production activity underpins an extensive value chain – spanning production, sales and distribution, broadcasters, cinemas, VOD platforms, amongst other constituents. Our analysis estimates that every £1 of direct public funding supports around £4.40 of total GVA across the film and television full value chain.
- Our review of evidence identified a range of further economic and cultural spillovers associated with public support for film and television production, including screen tourism, the development of new talent, and the generation of cultural value.

¹⁵ There is not a consistent definition of what constitutes an unscripted or scripted production. Our definition is based on a described from [Screen Skills](#) wherein scripted productions include actors, and non-scripted productions do not. Therefore, creative documentaries fall into the unscripted category.

Table 8. Economic impact of direct public funding for film and television

Direct public funding (£m)				
Direct public funding	56			
	Production spend (£m)	Production spend per £1 of public investment		
Total production budgets supported	258	4.60		
UK production budgets supported	190	3.40		
	Additional GVA (£m)	Additional GVA (£m) per £1m of public investment	Additional FTEs	Additional FTEs per £1m of public investment
Direct economic impact (production only)	66	1.2	1,310	23
Total economic impact (production only)	149	2.7	2,890	52
Direct economic impact (full value chain)	118	2.1	2,780	50
Total economic impact (full value chain)	247	4.4	3,140	56

Source: Alma Economics 2025

Definitions of key terms

- **Direct economic impact (production only):** This refers to the immediate economic benefit of the budget spent on production activity, including wages paid to actors and crew, renting equipment, and location fees.
- **Total economic impact (production only):** These impacts include the benefit of the budget spent on production activity, as described above, as well as the ripple effects of this spending across the supply, including the revenue made by non-film and television sector companies supporting productions (e.g., catering, spending on accommodation, etc.), as well as the economic impact of the wages spent by those employed on productions, called indirect and induced effects respectively.
- **Direct economic impact (full value chain):** These impacts include the economic benefit of activity across the entire value chain, based on direct public funds, rather than being limited to production budgets alone. It includes the benefit of budget spent in all parts of the film and TV value chain, including distribution, sales and marketing, exhibition and video on demand.
- **Total economic impact (full value chain):** These impacts include the economic benefit of spending across the entire value chain, as well as the ripple effects of this spending throughout the supply chain. Therefore, it includes all elements of the total economic impact of production spending, as well as induced effects (e.g., the economic impact of the wages of those employed across the value chain as a result of productions supported by public funds), and indirect effects (e.g., the economic impact of budget spent by increased demand from industries serving all parts of the film and television value chain).

Direct public funding stimulates additional production spend

Insights from the interviews with production companies highlighted the important role direct public production funding plays in unlocking subsequent funding from other sources, including indirect public funding (such as tax credits and broadcaster investments of license fee revenue), as well as private investment in some cases. Particularly for productions with smaller budgets and without major studio backing, we understand that securing direct public funding is often a crucial first step in securing production finance, giving other financiers the confidence to invest (with productions then also being able to leverage available tax credits).

The economic model combined our estimate of available direct public funding with our estimate of the share of production budgets supported by public funds to estimate the amount of additional funding leveraged by supported productions. This analysis assumed different rates of leveraging additional finance by production type, with public funding representing differing proportions of total funding for domestic productions (26%), co-productions (16%), and inward investment productions (18%).

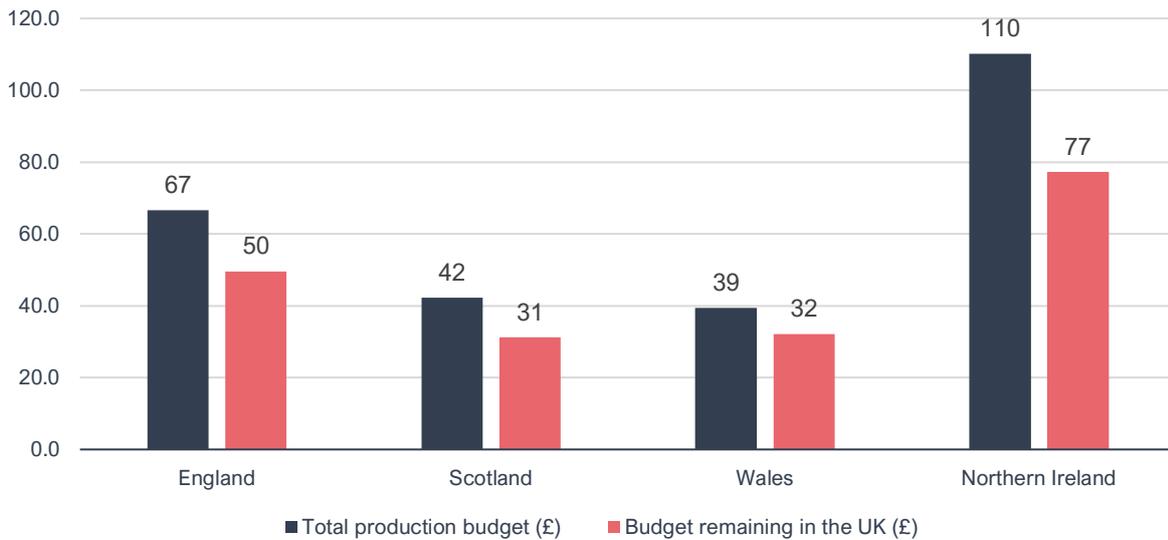
Based on this, our economic model estimates that the £56m of direct public funding dispensed annually supports £258m of film and television production spend. This represents around £4.60 of production spend supported for every £1 of public investment. Of the £258m of supported film and television production spend, around £190m (74%) is estimated to be spent in the UK. This represents £3.40 of UK production spend for every £1 of public investment.

We anticipate that the share of production spend retained in the UK will vary year on year, depending on the mix of domestic, inward investment, and co-productions supported by public funds. Factors

that could drive production budget to be spent outside the UK include the extent to which VFX or post-production takes place abroad, the prevalence of scenes being shot outside of the UK (which is often the case for co-productions and many inward productions), and administrative activity taking place outside the UK (often the case where a large international studio is involved).

The level of production activity supported by direct public funds was found to vary across the UK's nations, reflecting varying amounts of available funding and differences in how funding was targeted. Funds in Northern Ireland supported the greatest amount of production activity, largely driven by the relatively large amount of direct production funding awarded annually.

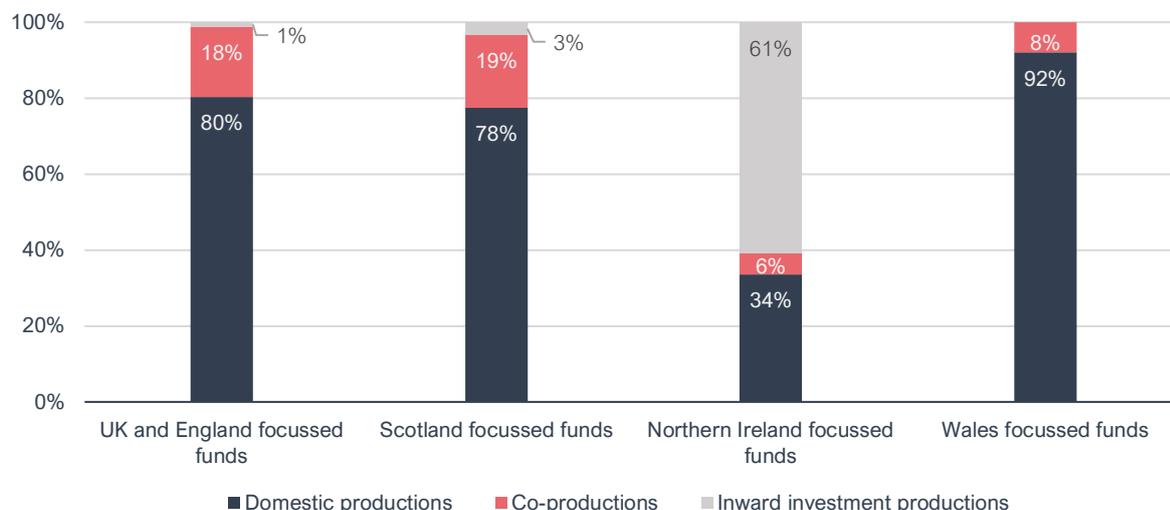
Figure 1. Total production budget, and budget remaining in the UK by nation



Source: Alma Economics analysis, 2025

Some of the proportion of the production budget remaining in the UK is driven by the proportion of co-productions, domestic productions, and inward investment productions supported by each production fund, which varied significantly across the nations, based on our analysis of a sample of supported productions. Northern Ireland is an outlier, with 61% of funding awarded by Northern Ireland-focused funds awarded to inward investment productions, while all other nations' funds dedicated the majority of their funding to domestic productions.

Figure 2. Share of funding awarded to domestic productions, co-productions, and inward investment productions by nation



Source: Alma Economics analysis, 2025

Supported production activity directly generates additional economic value and employment for the UK economy

By combining estimates of the additionality of direct public funding with impact multipliers from the economic literature, our economic model shows that the production spend supported by direct production funds translates to additional economic output (GVA) and employment for the UK economy. A detailed summary of our approach to measuring economic impact and supporting assumptions is detailed in Annex B.

The table below presents estimates of additional direct economic impact, representing the GVA and employment generated directly from spend on the supported productions:

Table 9. Direct economic activity by nation – production sector

	Additional direct GVA (£m)	Additional direct GVA (£m) per £1m of public investment	Additional direct FTEs	Additional direct FTEs per £1m of public investment
England	21	1.4	410	27
Scotland	13	1.3	250	27
Wales	14	1.4	270	28
Northern Ireland	19	0.9	370	17
Total	66	1.2	1,310	23

Source: Alma Economics analysis, 2025

Additional spend on productions also creates second order benefits for the UK economy in the form of indirect benefits (additional output flowing from increased demand in the supply chains serving the film and television production sector) and induced benefits (reflecting the economic activity generated from the wages of employees and freelancers working on supported productions). When considering the wider definition of economic value, we estimate that public funds generate around £2.60 for every £ of direct public funding, as well as 52 additional FTEs for every £1m of public funding (see table below).

Table 10. Total economic impact – production sector

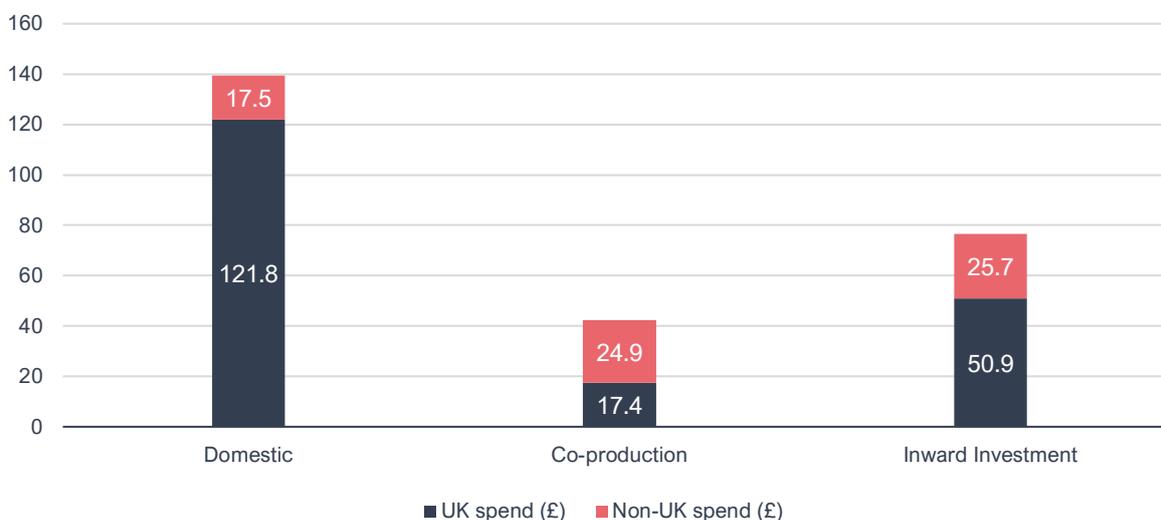
	Additional total GVA (£m)	Additional total GVA per £1m of public investment	Additional total FTEs	Additional total FTEs per £1m of public investment
England	48	3.1	920	61
Scotland	29	3.1	570	60
Wales	31	3.2	600	63
Northern Ireland	42	1.9	810	37
Total	149	2.7	2,890	52

Source: Alma Economics analysis, 2025

Investment in domestic production and co-production is estimated to be most potent for generating additional production spend

Direct public funding (see chart below) was found to support a mix of production types, including domestic productions (64% of funding), co-productions (12% of funding), and inward investment productions (25% of funding).

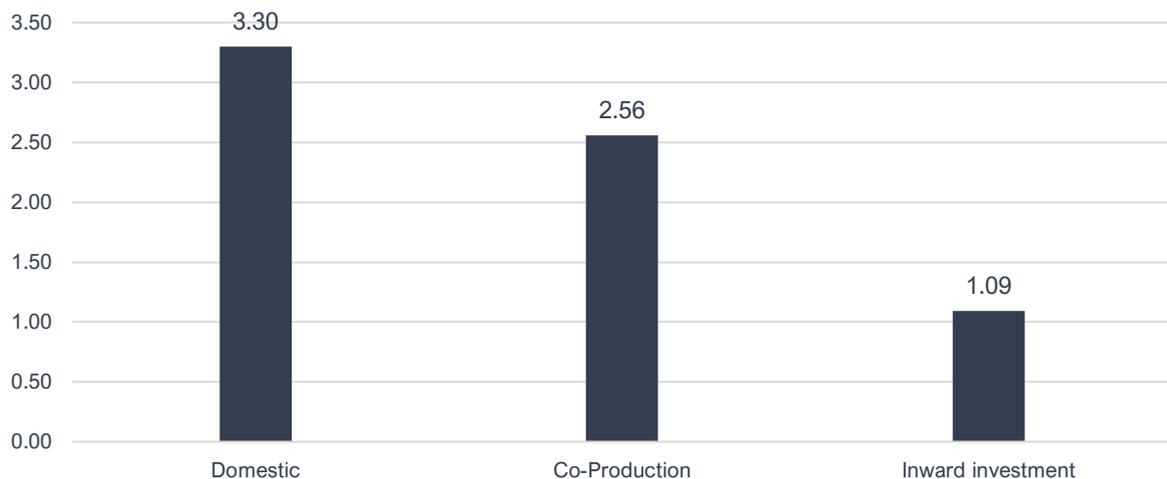
Figure 3. Annual UK and non-UK production spend (£m), by production type



Source: Alma Economics analysis, 2025

Our economic model estimated that the potency of direct public funding for film and television production also varied by production type (see chart below), with the total economic impact per £1 of public investment higher for domestic productions (around £3.30) and co-productions (around £2.60) than for inward productions (around £1.10). This effect also applies to full-time employment, with domestic productions supporting more FTEs per £m spent (approximately 65 FTEs) than both co-productions (50 FTEs) and inward investment productions (20 FTEs).

Figure 4. Total economic impact per £1 of production spend by production type



Source: Alma Economics analysis, 2025

This higher potency for domestic and co-productions is explained by the following factors (see Annex B for further detail on these assumptions):

- The assumption that a larger share of the additional production spend remains in the UK for domestic productions (87%), compared with co-productions (41%) and inward investment productions (66%).
- Different assumed rates of leveraging additional finance, with public funding representing differing proportions of total funding for domestic productions (26%), co-productions (16%), and inward investment productions (18%).
- Higher estimated rates of additionality for supporting domestic productions (75%) and co-productions (75%), compared with inward investment productions (25%). This reflects our understanding that securing direct public funding is often the key first step in securing financing for domestic and co-productions, giving other financiers the confidence to invest against the backdrop of substantial risk. On the other hand, we understand that inward productions would typically have already secured financial backing from a major studio, meaning that other factors such as the availability of a competitive tax credit and access to crew and infrastructure are more important factors for inward investment productions basing themselves in the UK.¹⁶
- We assume that a talent incubation spillover effect applies to domestic and co-productions, representing an additional £0.20 of economic benefit per £1 of public investment (Alma Economics, 2023).

¹⁶ The conclusion that different factors are responsible for promoting inward investment and domestic productions is supported by survey data from Film Tax Relief (FTR) and High-end TV Tax Relief (HETR) recipients analysed as part of Screen Business 2021. This analysis estimated that the gross rates of additionality of the tax reliefs were substantially higher for inward investment productions (100% for both FTR and HETR) than for domestic productions (46% and 43% respectively).

Economic benefits permeate through the wider film and television value chain

Despite wider value chain impacts not explicitly being considered in the HM Treasury Green Book, it is still worth acknowledging the impact that the additional production activity has on the UK's wider film and television value chain. The Screen Business 2021 report describes the diverse and interconnected range of constituents which form the UK's film and television value chain, which includes producers, sales and distribution, broadcasters, cinemas, and VOD platforms, amongst other constituents. All of these constituents are at least partially dependent on a pipeline of UK-produced film and television content, which respectively supports economic output and employment over and above that which is directly generated through film and television production activity alone.

The table below presents the estimated full value chain economic impacts of direct public funding for the UK. Our estimates were derived by scaling the estimates of additional production activity by the value chain multipliers estimated in Screen Business 2021 (see Appendix A for detail).

Table 10. Full value chain impacts

Full value chain impacts	Additional value chain GVA supported (£m)	Value chain GVA supported per £1m of investment (£m)	Additional value chain FTEs supported	Value chain FTEs supported per £1 of public funding
Direct impact	118	2.1	2,780	50
Total impact (direct, indirect, and induced)	247	4.4	3,140	56

Source: Alma Economics analysis, 2025

Review of economic and cultural impacts of direct public funding for film and television

Existing evidence of economic impact

The section below summarises the limited existing evidence base on the economic impact of direct public funding for film and television production in the UK.

Funds in the UK nations:

- Creative Wales¹⁷ estimates that production funding awarded since the creation of the body in 2020, has resulted in over **£155m in production spend in the Welsh economy**.
- Evidence presented to the Welsh Seanadd by Ffilm Cymru Wales found that every £1 of Ffilm Cymru investment, leveraged an average of £7.52 in third party finance.¹⁸

¹⁷ That's a wrap on another busy year for film and TV in Wales, Welsh Government, 27 December 2022. See: <https://www.gov.wales/thats-wrap-another-busy-year-film-and-tv-wales>

¹⁸ Evidence from Ffilm Cymru Wales, 2023. See: <https://business.senedd.wales/documents/s68077/ART19%20Ffilm%20Cymru%20Wales.pdf>

- In Northern Ireland, Northern Ireland Screen estimates in their “Adding Value” (2021) report¹⁹ that investment by Northern Ireland Screen is tied to **£300m in expenditure in Northern Ireland** on Northern Irish goods and services.
- While we found no existing evaluations or impact reports of direct public funds specifically in Scotland, a Saffery Champness report (2021)²⁰ found that **production and development in Scotland contributed 7,150 FTEs and £442m in GVA** in 2021.

Funds in the English regions:

- The North East Screen Industries Partnership (the body providing funding to North East Screen) **estimated that every £1 invested in the region, an additional £8 is spent.**²¹ Film and television production in the North East has generated £40.2m in estimated GVA, and 650 estimated FTEs.
- Screen Yorkshire found that investment from **Screen Yorkshire has leveraged £234m in production spend**, equating to over 10x the amount invested²².
- Liverpool Film Office²³ found that the **301 productions shooting across Liverpool in 2023** alone accounted for nearly 1,933 filming days, representing significant production activity in the region.

UK-wide funds:

- An impact report examining the BFI Doc Society Funds²⁴ estimated that for **every £1 of public funding invested, an additional £4 is invested by other parties**, indicating public funding invested by Doc Society allows projects to leverage significant amounts of outside funding.

Wider cultural impacts

Measurements of wider cultural impact, in particular, are typically illustrative at best and reliant on anecdotal evidence. In this section, the cultural impact of productions funded by direct public funds has been analysed according to metrics such as screen tourism, skills development, talent incubation, and other impacts such as authentic representations of local cultural identity.

¹⁹ Adding Value: Vol 3, Northern Ireland Screen, 2021. See: <https://www.northernirelandscreen.co.uk/wp-content/uploads/2017/06/NI-Screen-Value-Report-2021-low-res-8mb.pdf>

²⁰ Economic Value of the Screen Sector in Scotland in 2021, Saffery Champness, 2021. See: https://www.screen.scot/binaries/content/assets/screen-scot/funding--support/research/economic-value-of-the-screen-sector-in-scotland-in-2021/full-report-economic_value_of_screen_sector_in_scotland_2021_2023-08-21-1.pdf

²¹ Impact Report 2022-2024, North East Screen, 2024. See: https://northeastscreen.org/wp-content/uploads/2024/11/NES_Impact_Report_24_Final_LRZ.pdf

²² The Economic Benefits of Film Production, Screen Yorkshire, n.d. See: <https://www.screenyorkshire.co.uk/news/the-economic-benefits-of-film-production/>

²³ Liverpool Film Office Kickstarts 35th Anniversary with Busiest Year to Date, 21 December 2023. See: <https://liverpoolfilmoffice.tv/home/liverpool-film-office-kickstarts-35th-anniversary-celebrations-with-busiest-year-to-date/>

²⁴ Documentary Lives Here: Five Years of the BFI Doc Society Fund, BFI Doc Society, April 2024. See: https://docsociety.org/static/core/pdf/BFI_Review_Apr2023.pdf

Screen tourism: Screen production can influence visitors or travellers to visit specific locations featured in the production, which would otherwise have seen lesser or limited tourism activity.²⁵

Skills development and talent incubation: Screen production can provide opportunities for on-set training of crew, and to develop industry-ready skillsets. This helps build a local crew base and strengthen local capacity to support productions of various types and sizes. The promotion of local ATL talent through debut opportunities also similarly helps build a talent pool that goes on to develop or work on future successful productions. This fuels the growth of the local screen sector and boosts the profile of the region as a screen production location.

Authentic representation of local cultural identity: Screen production can bring authentic portrayals of hyperlocal cultural identities, experiences, history, and lesser-known narratives to the screen. This can make people feel represented, thereby also strengthening local cultural identity.

Given the difficulty in mapping cultural impacts of each fund due to sporadic availability of relevant evidence, this section analyses the cultural impacts of specific funded productions, where data is available. This analysis is then organised by the region and/or UK nation where these impacts are felt.

Funded productions generate tourism for UK's Nations, while spurring local talent and skills development

Scotland

In Scotland, cultural impact through screen tourism is clearly established. In 2024, a visitor attitudes survey conducted by Visit Scotland, showed that 18% of respondents were inspired to visit Scotland, by film or television programmes featuring Scotland.²⁶ The same survey found that films and television content featuring Scotland were particularly useful in attracting visitors from Europe and long-haul destinations, inspiring 36% and 37% of respondents to visit Scotland, respectively.²⁷ In this survey, respondents commonly identified *Outlander* and *Shetland* as productions that specifically inspired them to visit Scotland.

Screen Scotland-funded productions have also contributed to the representation of Scottish locations and culture. Productions such as *The Rig*, which was supported by production funding from Screen Scotland's Production Growth Fund, have brought remote and scenic Scottish locations to global audiences. *The Rig* was reportedly one of Amazon Prime Video's biggest investments, and while fictional, featured a depiction of hyperlocal stories and ecological experiences from Scotland.²⁸

Funded productions have also contributed to skills development and, subsequently, the growth of the local crew base. The Screen NETS traineeship programme, which is partly funded by Screen Scotland, is aimed at supporting the on-the-job skills development of Scottish crew by supporting

²⁵ A Nation Brands Index survey sponsored by Visit Britain exploring the role of film and television in UK trip planning, showed that 70% of visitors who have travelled to the UK for a leisure trip in the last 10 years have visited a film or television location in the UK. Importantly, this survey showed that 1 in 6 of visitors to the UK were influenced by a film or television location to travel to regions outside London. See: <https://www.visitbritain.org/research-insights/screen-tourism>

²⁶ Scotland Visitor Survey 2023. Visit Scotland, April 2024. See: <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-insights/scotland-visitor-survey-2023-motivations-and-inspiration-updated.pdf>

²⁷ Ibid.

²⁸ The Rig creator on taking the supernatural thriller from the North Sea to the Arctic Circle. The Scotsman, 31 December 2024. See: <https://www.scotsman.com/arts-and-culture/the-rig-prime-video-david-macpherson-north-sea-arctic-circle-4912032>

trainees who work on ongoing productions across production departments. So far, trainees have worked on the set of the second season of *The Rig*, across the production office, art, and post-production departments, over the course of 6 months.²⁹ Other than *The Rig*, various other Screen Scotland funded productions have supported trainees under this programme, including *Nightsleeper* (Production Growth Fund), *Sebastian* (Film Development and Production Fund), *Rebus* (Production Growth Fund), *Karen Pirie S2* (first season supported by the Broadcast Content Fund), and *Lockerbie: A Search for Truth* (Production Growth Fund).³⁰

Screen Scotland funded productions have also contributed to the launch of Scottish filmmaking talent. Examples include *Aftersun*, which accessed the Production and Development Fund and the Distribution Fund, alongside BFI funding, was a success in festival circuits and instrumental in launching the film's director, Charlotte Wells. Wells received a string of coveted awards for *Aftersun*, including the Director's Guild of America, BAFTA, New York Film Critics awards.^{31,32} Another example is *Limbo*, which accessed the Distribution Fund and was similarly notable as a critical and festival success, and went on to launch its writer-director, Ben Sharrock.³³

Northern Ireland

The cultural impact of funded productions is best illustrated by the *Game of Thrones* series, which attracted significant screen tourism to Northern Ireland. Having been filmed exclusively in Northern Ireland, the series brought Northern Ireland's scenic locations to global audiences, propelled further by the widespread popularity and international reach of the series. Research conducted by Tourism NI in 2018, showed that the series brought in 350,000 visitors to the Nation that year. The research showed that over £50m was spent by visitors in the Nation in 2018.³⁴ Recognising the link between screen content and tourism, tourism bodies in the Nation leveraged the opportunity created by *Game of Thrones*, considering it the show their "most valuable asset" in building the Nation's profile as a popular tourism destination. Tourism NI's visitor attitudes survey conducted in 2018, showed that 16% of respondents had been influenced to visit Northern Ireland by *Game of Thrones* locations.³⁵

Northern Ireland Screen funded productions also contribute to talent incubation and authentic cultural representation. *Kneecap* is an example of such cross-cutting cultural impact, with the film receiving critical and commercial acclaim for its portrayal of Irish language and identity. Not only was the plot centred on the preservation and promotion of the Irish language, but the film itself was also the first Irish language film to break through in several festival and award circuits. Additionally, the film served to launch the music trio, *Kneecap* (on whom the film is based) as acting talent.

Wales

The cultural impact of funded productions in Wales is best demonstrated by the television series, *Sex Education*. The series was filmed entirely in Wales and has been known for its portrayal of unique and

²⁹ The Rig Season 2 Screen NETS 2023. Screen NETS, 2023. See: <https://www.screen-nets.org.uk/rig-2>

³⁰ About. Screen NETS, n.d. See: <https://www.screen-nets.org.uk/about>

³¹ Aftersun. Screen Scotland, n.d. See: <https://www.screen.scot/film-in-scotland/made-in-scotland/film/aftersun>

³² Charlotte Wells Awards. IMDb, n.d. See: <https://www.imdb.com/name/nm3834799/awards/>

³³ Limbo. Screen Scotland, n.d. See: <https://www.screen.scot/film-in-scotland/made-in-scotland/film/limbo>

³⁴ Northern Ireland *Game of Thrones* Territory: The Making of a Screen Tourism Destination. Tourism NI, 2021. See: <https://www.tourismni.com/globalassets/business-development/support-by-sector/activities--attractions/grow-your-business/game-of-thrones/the-making-of-a-screen-tourism-destination.pdf>

³⁵ Tourism Fact Card. Tourism NI, 2018. See: <https://www.tourismni.com/globalassets/industry-insights/visitor-attitude-survey/vas-ni-fact-card-2018.pdf>

scenic Welsh locations, which have been positively received by international audiences. Given the show's popularity and global reach, it has contributed to widespread viewership of these areas. Leveraging this opportunity, Visit Wales has featured the *Sex Education* filming locations on its website, thereby further promoting the scenic locations of Wye Valley and South Wales.³⁶ The show also reportedly contributed to skills and talent development: over four seasons, the show supported 36 trainees across various production departments, all of whom are Welsh residents. Reportedly, all these trainees have found opportunities in productions in Wales.³⁷

Creative Wales assesses applications for funding in line with its strategic priorities, which include 'skills and talent development' and the 'cultural representation of Wales'. As such, projects that commit to boosting cultural impacts such as creating work placement and traineeship opportunities, promoting diversity and inclusion, and bridging existing skills gaps, are prioritised. Similarly, Ffilm Cymru funding prioritises projects with Welsh talent at the helm. A recent example is Welsh-Indian director, Ila Mehrotra's feature documentary, *India's First Best Trans Model Agency*, based on the trans community in Delhi. The film, made with funding from Ffilm Cymru and BFI Network, is a testament to global storytelling with diasporic roots.

Other examples point to cultural impact through local sector development and cultural representation. This is shown by the animation film, *Kensuke's Kingdom*, where Creative Wales and Ffilm Cymru provided crucial funding to local Welsh-based animation studio, Bumpybox,³⁸ Similarly, *Save the Cinema* (funded by Creative Wales and BFI's National Lottery Funding), a Welsh language true story adaptation of the fight to save the Carmarthenshire's lyric theatre.³⁹

Funded productions offer authentic portrayals of life and diverse identity in England's regions

West Midlands Production Fund

In the West Midlands, productions are funded by Creative UK's West Midlands Production Fund. Cultural value generated by this fund is demonstrated by funded productions such as *D.I. Ray* and *Small Axe*. Both productions bring authentic portrayals of immigrant identity and diasporic experiences, to mainstream screen audiences. *Small Axe* is an anthology film series, with two films filmed in Wolverhampton, and centres on the lives of West Indian immigrants in London, between the 1960s and 1980s. Each of the films in the anthology depicts the distinct, often challenging, experiences of England's West Indian immigrants, also portraying true historic events, e.g., the story of the Mangrove 9 protest against police brutality.⁴⁰ The anthology has been praised by viewers for its depictions of the overlapping experiences of social class, race, and other inequalities faced by Black British people, representing "an entire generation of Black British people who had never before seen

³⁶ Where Netflix's Series Sex Education is Filmed in Wales. Visit Wales, n.d. See: <https://www.visitwales.com/things-do/attractions/tv-and-film-locations/sex-education-filming-locations-wales>

³⁷ Why Netflix chose Wales: the story of Sex Education. Creative Wales, 8 August 2023. See: <https://www.creative.wales/why-netflix-chose-wales-story-sex-education>

³⁸ Kensuke's Kingdom: How Cardiff's Bumpybox helped to bring the animated film to life. Creative Wales, 6 August 2024. See: <https://www.creative.wales/inside-animated-adaptation-kenskues-kingdom#:~:text=Funding%20and%20support%20for%20the%20animation%20industry&text=For%20Camilla%20and%20Lupus%20Films,Ke nsuke's%20Kingdom%2C%20she%20explains.>

³⁹ Newly released Welsh film 'Save The Cinema' focuses on Carmarthenshire's Lyric Theatre. BFI Fan, 12 January 2022. See: <https://www.bfi-fan.org.uk/news-articles/newly-released-welsh-film-save-the-cinema-focuses-on-carmarthenshires-lyric-theatre/>

⁴⁰ Mangrove Nine Protest. The National Archives, n.d. See: <https://www.nationalarchives.gov.uk/education/resources/mangrove-nine-protest/>

themselves represented in that format, or in stories on-screen that unabashedly center their lives and experiences,”⁴¹ noting, further, that, “.little has been greenlit around Black British history, and in particular West Indian immigration to England (including the colonial factors that led to emigration).” Similarly, *D.I. Ray* is a series set and filmed in Birmingham, featuring a female, South Asian police officer investigating a high-profile crime and navigating the complexities of the justice system as an ethnic minority officer. The production created opportunities for local crew and talent.⁴² The series was also the first writing credit for actor Maya Sondhi, whose work was praised by viewers for authentic portrayal of a British Asian character, that “throws all those tired old tropes out the door and reflects complex systems of racism realistically.”⁴³

Liverpool City Region Production Fund

In Liverpool, the City Region Fund has supported a string of productions contributing to the cultural representation of Liverpool and its residents. The funded series, *The Responder* illustrates this impact well. The popular, award-winning series is a police drama that tells the story of a police officer from Liverpool. The production primarily featured a local cast, and committed to the authentic representation of the region and its distinct cultural identity, including an accurate depiction of the ‘scouse accent’ which often differs subject to social class.⁴⁴ Additionally, the funded series was the screenwriting debut of former Liverpool police officer, Tony Schumacher, whose personal story was reflected in the series. Schumacher’s debut on the production won him various filming accolades⁴⁵ and led to the series being greenlit for a successful second season.⁴⁶ Other recent productions supported by the Fund, such as *G’Wed* (2024) also brought hyperlocal cultural experiences and identities to screen, telling the stories of working-class teenagers from Liverpool, such as delving “into the Scouse culture of ‘surviving with a sense of humour.’”⁴⁷

Yorkshire Content Fund

In Yorkshire, Screen Yorkshire-funded productions such as *All Creatures Great and Small*, and *Emmerdale* have been known to portray scenic Yorkshire locations on screen, attracting fans of the productions to the region. Similarly, in 2016, Visit East Yorkshire created tourism trails for the film locations of productions such as *Dad’s Army*,⁴⁸ which also boosted the profile of previously “run down” and “off the map” areas such as the old town in Bridlington, where the production was filmed.⁴⁹ Other notable cultural impacts in the region include a growing sense of cultural pride, regional identity and belonging spurred by the depiction of distinct local landscapes, cultural experiences, and regions on screen. An example is *The Duke*, which received funding from Screen Yorkshire, and is based on the

⁴¹ Small Axe: Seared into Consciousness. The Criterion Collective, 25 April 2023. See: <https://www.criterion.com/current/posts/8119-small-axe-seared-into-consciousness?srsltid=AfmBOopeUYNJvSrXCh3UDFYsXFX8LJa1JMDmleD9Jn5HwpWuoeeTa0zR>

⁴² DI Ray Returns to Birmingham & the West Midlands for Second Series. Create Central, 25 October 2024. See: <https://www.createcentraluk.com/news/blogdiray>

⁴³ DI Ray is a Deliciously Complex and Nuanced British Police Procedural. Medium, 10 August 2023. See: <https://medium.com/@visibleblackwoman/di-ray-is-a-nuanced-british-police-procedural-that-is-deliciously-complex-d4e479317859>

⁴⁴ The Responder: Crime Drama Gets a Dose of Reality. Broadcast Now, 24 January 2022. See: <https://www.broadcastnow.co.uk/bbc/the-responder-crime-drama-gets-a-dose-of-reality/5166849.article>

⁴⁵ Tony Schumacher Awards. IMDB, 2025. See: <https://www.imdb.com/name/nm3381604/awards/>

⁴⁶ The Responder Series Two Review – Another Total TV Triumph. The Guardian, 5 May 2024. See: <https://www.theguardian.com/tv-and-radio/article/2024/may/05/the-responder-series-two-review-another-total-tv-triumph>

⁴⁷ G’Wed. ITV Press Center, 4 Feb 2024. See: <https://www.itv.com/presscentre/media-packs/gwed>

⁴⁸ Dad’s Army Film Trail. Visit East Yorkshire. See: <https://www.visiteastyorkshire.co.uk/listing/dads-army-film-trail/130529101/>

⁴⁹ We’re not doomed! Bridlington could make millions from Dad’s Army film. The Yorkshire Post, 28 January 2016. See: <https://www.yorkshirepost.co.uk/arts-and-culture/were-not-doomed-bridlington-could-make-millions-from-dads-army-film-1805160>

true, quirky story of the theft of the portrait of the Duke of Wellington from the National Gallery, by a pensioner from Newcastle.⁵⁰ As such, the film brought a unique piece of local history to global audiences.

UK-Wide Funds

Alma Economics' evaluation of the BFI Film Fund showed that a majority of productions supported by the BFI Development Fund between 2017-2022 were for first or second projects of filmmakers. Although limited, the study's primary research also showed some evidence of BFI-funded films boosting the UK's soft power. The BFI funds regularly provide funding for majority or minority UK co-productions, which, although not evidenced, may contribute to bettering cultural relations between co-producing countries, through audiovisual storytelling and the exchange of cultural goods.

While funding is still concentrated in London and the South East, the BFI's funding aims to supplement other support provided by funds in the UK's nations and regions. Recent films such as *Kneecap*, where BFI funding contributed to funding provided by NI Screen (among other funders) is an illustration of this, particularly given the film's commercial and critical success and its portrayal of Northern Ireland's cultural history, centralising the experiences of Irish speakers of Belfast. Another example is *Aftersun*, where BFI funding contributed to other funding by Scotland, launching its writer-director, Charlotte Wells to success.

UK-wide cultural impact through screen tourism of BFI-funded productions is also best explored locally, being useful for areas that are currently beyond the reach of specific regional funds. The upcoming film, *The Salt Path* (2025), illustrates this screen tourism opportunity. The film is an adaptation of a book based on the true story of an English couple trailing the English South West Coast Path. Although the film is yet to be released in the UK, tourism bodies such as Visit Britain have launched online campaigns attempting to attract tourists to the "cinematic appeal of the Salt West Coast Path", providing a detailed breakdown of locations on the trail that are depicted in the film.⁵¹

⁵⁰ The Amazing Story Behind the Duke. The National Archives, 21 April 2022. See: <https://blog.nationalarchives.gov.uk/the-amazing-story-behind-the-duke/>

⁵¹ The Salt Path: discover the cinematic appeal of the South West Coast Path. Visit Britain, January 2025. See: <https://www.visitbritain.org/news-and-media/destination-news-and-inspiration/salt-path-discover-cinematic-appeal-south-west>

Annex A: List of public funds

The following tables present the full list of production and development funds identified through the research in each nation, as well as key information about each.

Table 11. Funds relevant to Northern Ireland

Fund name	Administering organisation(s)	Individual grant amounts ⁵²	Total annual grant awards	Terms of funding	Year of most recent data
Production Fund	Northern Ireland Screen	£12.5k - £4.1m	£17.6m	Funding is in the form of a recoupable loan with profit participation, or in limited circumstances, a grant. NI Screen will not consider productions with less than 65% of their funding in place. ⁵³	2022/23
Irish Language Broadcast Fund	Northern Ireland Screen	£400k-£1k	£3.2m	ILBF will fund up to 50% of development costs, and up to 75% of overall production costs. If aid intensity is 75% or more, 70% of costs must be spent in NI. If aid intensity is lower, NI spend must equal the aid level. ⁵⁴	2022/23

⁵² Amount awarded and total investment of the fund are based on Funding Award decisions for 2022/23, published by Northern Ireland Screen. Available at: <https://northernirelandscreen.co.uk/wp-content/uploads/2023/05/Funding-Decisions-2022-23.pdf>

⁵³ Terms of funding for the Northern Ireland screen production fund are available at: <https://northernirelandscreen.co.uk/filming/production/>

⁵⁴ Terms of funding for the ILBF are provided in the document "ILBF Guidelines" available here: <https://northernirelandscreen.co.uk/irish-language-broadcast-fund/forleargas-overview/>

Development Fund	Northern Ireland Screen	£1k-£100k	£2.8m	All project awards are development is recoupable, slate development funding are recoupable loans, and script development requires match funding for awards above £7.5k. ⁵⁵	2022/23
Ulster Scots Broadcast	Northern Ireland Screen	£144k-1.6k	£965k	Funding is dependent on a broadcaster having indicated that it wishes to broadcast the programme proposed. If aid intensity is 75% or more, 70% of costs must be spent in NI. If aid intensity is lower, NI spend must equal the aid level. ⁵⁶	2022/23

⁵⁵ Full terms of funding for NI Screen Development funding is available at: <https://northernirelandscreen.co.uk/funding/development/>

⁵⁶ Full terms of funding for the USBF are available at: <https://northernirelandscreen.co.uk/wp-content/uploads/2024/02/USBF-guidelines-updated-Feb-2024-1.pdf>

Table 12. Funds relevant to Scotland

Fund name	Administering body	Amount awarded	Total annual investment	Terms of funding	Year of most recent data
Film Development and Production Fund – Development funding	Screen Scotland	£3k-£50k	£4.5m across both production and development. ⁵⁷	Development funding must be repaid on the first day of principal photography if the project goes into production. If the project is produced by an independent, Scotland-based producer, the funds will be kept in a 'locked box', allowing the funds to be reinvested in future productions. ⁵⁸	2022/23
Film Development and Production Fund – Production funding	Screen Scotland	£100k-£500k	£4.5m across both production and development	Film Production funding is an equity investment and is recoupable behind debt and mezzanine funding. Creative Scotland also expects to receive a share of net profits proportional to their equity investment. ⁵⁹	2022/23

⁵⁷ Total annual investment for the Film Development and Production fund comes from Creative Scotland's Annual Report and Accounts for 2023. Available at: https://www.creativescotland.com/binaries/content/assets/creative-scotland/resources-and-publications/publications/annual-reports-and-accounts/2022-23/e03001961-creative-scotland-national-lottery-distribution-fund-ara-22-23_v1_elay.pdf

⁵⁸ Full terms of funding for Screen Scotland's Film Development and Production Fund are available at: <https://www.screen.scot/binaries/content/assets/screen-scot/funding--support/support/bfi-diversity-standards-april-2023-update/filmdevprod-guidance-update-april-2023.pdf>

⁵⁹ Full terms of funding for Screen Scotland's Film Development and Production Fund are available at: <https://www.screen.scot/binaries/content/assets/screen-scot/funding--support/support/bfi-diversity-standards-april-2023-update/filmdevprod-guidance-update-april-2023.pdf>

Broadcast Content Fund – development funding	Screen Scotland	£10k-£100k	£3m across both production and development	Development funding must be repaid on the first day of principal photography if the project goes into production. If the project is produced by an independent, Scotland-based producer, the funds will be kept in a ‘locked box’. ⁶⁰	2021
Broadcast Content Fund – production funding	Screen Scotland	£100k-£500k	£3m across both production and development	Creative Scotland Broadcast Production Funding is an equity investment in the project and is recoupable and would be recouped alongside other equity funding prior to the project getting into net profits. The fund would also be entitled to a net profit share once each project gets into net profit, with the amount of such net profit share to be agreed on a case-by-case basis. ⁶¹	2021
Production Growth Fund	Screen Scotland	£200k-£500k	£2m	Production Growth Funding is non-recoupable. Applicants must have a minimum Scottish spend ratio of 10:1 ⁶²	2022

⁶⁰ Full terms of funding for Screen Scotland’s Broadcast Content Fund can be found at: <https://www.screen.scot/binaries/content/assets/screen-scot/funding--support/funding/broadcast-content-fund-guidance-may-2021-final.pdf>

⁶¹ Full terms of funding for Screen Scotland’s Broadcast Content Fund can be found at: <https://www.screen.scot/binaries/content/assets/screen-scot/funding--support/funding/broadcast-content-fund-guidance-may-2021-final.pdf>

⁶² Full terms of funding for the Production Growth Fund are available at: <https://www.screen.scot/binaries/content/assets/screen-scot/funding--support/funding/production-growth-fund-guidance.pdf>

Table 14. Funds relevant to Wales

Fund name	Administering body	Amount awarded	Total annual investment	Terms of funding	Year of most recent data
Creative Wales Production Funding	Creative Wales	£50k-£750k for scripted productions, £50k -£300k for non-scripted production, and £50k to £500k for animation	£6m	Creative Wales Production funding is typically a grant. However, they require minimum levels of Welsh spend, depending on the genre ⁶³	2023
Sinema Cymru Film Fund	Creative Wales, Ffilm Cymru Wales, S4C	Teams will be offered up to £30k for development, with an opportunity for a further commission of £1m from S4C and £600k from Creative Wales	Up to £2m	Projects are issued a development agreement including standard approvals over key elements and a time-limited right of first refusal for S4C to invest in production ⁶⁴	2023
Feature Film Production	Ffilm Cymru Wales	£150k-£600k	£1.6m	Investment from Ffilm Cymru Wales will not exceed 50% of the total production budget. They will decide the proportion of equity and grant funding of the investment, which is largely influenced by the level of Welsh spend. ⁶⁵	2021/22

⁶³ Full terms of funding for Creative Wales Production Funding are available here: https://www.creative.wales/sites/creative/files/2023-05/Creative%20Wales%20Production%20Funding%20-%20Application%20Guidance%20-%20May%202023_0.pdf

⁶⁴ Further detail on Sinema Cymru can be found here: https://ffilmcymruwales.com/sites/default/files/2023-10/Sinema%20Cymru%20Guidelines%202023_0.pdf

⁶⁵ Full terms of funding for the Feature Production Fund are available here: [https://ffilmcymruwales.com/sites/default/files/2025-01/Ffilm Cymru Production Fund Guidelines Live Action Narrative %26 Animation.pdf](https://ffilmcymruwales.com/sites/default/files/2025-01/Ffilm%20Cymru%20Production%20Fund%20Guidelines%20Live%20Action%20Narrative%20-%20Animation.pdf)

Creative Wales Development Funding	Creative Wales	Maximum of £25k	£1m	Creative Wales will pay 100% up to the maximum grant awarded per project. ⁶⁶	2023
Young Content Fund	Creative Wales	£25k- £50k	£300k	Creative Wales will pay 100% up to £50k per project. ⁶⁷	2022/23
Feature Film Development	Ffilm Cymru Wales	£10k-£24.9k	£300k	Development funding is recoupable from a project's production budget, if the project is fully financed. ⁶⁸	2021/22
Beacons Short Film Funding	Ffilm Cymru Wales/BFI NETWORK Wales	£5k-£25k	£132k	The award is a non-recoupable grant. ⁶⁹	2021/22

⁶⁶ Full terms of funding for Creative Wales Development Funding are available here: https://www.creative.wales/sites/creative/files/2023-07/Creative%20Wales%20Development%20Fund%202023-%20External%20Guidance%20Notes%20English%20Issue%202_0.pdf

⁶⁷ Full Young Content Fund guidelines can be found here: <https://www.creative.wales/sites/creative/files/2022-12/Creative%20Wales%20Young%20Content%20Fund%20Guidelines%202022%20-%20English%20Web.pdf>

⁶⁸ Full terms of funding for the Feature Development Fund are available here: <https://ffilmcymruwales.com/sites/default/files/2025-01/Film%20Cymru%20Wales%20Development%20Fund%20Guidelines%20Live%20Action%20Narrative%20%26%20Animation%202024-25.pdf>

⁶⁹ Full fund guidelines for the Beacons Short Film Funding can be found here: <https://ffilmcymruwales.com/sites/default/files/2024-05/Beacons%20Guidelines%202024.pdf>

Table 15. UK-wide funds

Fund name	Administering body	Amount awarded	Total annual investment	Terms of funding	Year of most recent data
UK Global Screen Fund: Co-production strand	British Film Institute	£45k-£300k	Approximately £2.8m	Support is offered in the form of non-recoupable grants. ⁷⁰	2023/24
BFI National Lottery Development Funding	British Film Institute	£1.5k - £48.6k	£1.4m	Funding is in the form of a recoupable investment, repaid to the BFI no later than the first day of principal photography. BFI may also place recouped funding into a Locked Box. ⁷¹	2023/24 ⁷²
Small Indie Fund	BBC	Approximately £17.5k	£1m	Not available	2024
BFI Discovery Feature Funding	British Film Institute	Up to £1m	£950k	Funding is recoupable, and the BFI requires a proportionate share of financier net profits. Projects must have third party funding, the BFI cannot provide the entire budget amount. ⁷³	2023/24

⁷⁰ Full guidelines and information on the UKGSF: Co-production strand can be found here: <https://www.bfi.org.uk/get-funding-support/funding-support-international-activity/uk-global-screen-fund/uk-global-screen-fund-international-co-production/making-application-uk-global-screen-fund-international-co-production-strand>

⁷¹ Full guidelines and information on BFI National Lottery Development Funding can be found here: <https://www.bfi.org.uk/get-funding-support/create-films-tv-or-new-formats-storytelling/development-funding/making-application-bfi-national-lottery-development-funding#what-you-can-use-funding-for>

⁷² A full list of awards for BFI funds can be found here: <https://www.bfi.org.uk/funding-awards-made-bfi>. We use funding awards from 2023/24, as 2024/25 data does not represent a full year.

⁷³ Full guidelines and information on the BFI Discovery and Impact fund can be found here: <https://www.bfi.org.uk/get-funding-support/create-films-tv-or-new-formats-storytelling/bfi-filmmaking-fund-discovery-impact-feature-funding>

BFI Doc Society Features Fund	British Film Institute/Doc Society	£25k - £150k	Approximately £780k	Funding is awarded in the form of non-recoupable grants. ⁷⁴	2023
BFI Impact Feature Funding	British Film Institute	Up to £1.25m	£700k	Funding is recoupable, and the BFI requires a proportionate share of financier net profits. Projects must have third party funding, the BFI cannot provide the entire budget amount. ⁷⁵	2023/24
England Short Film Funding	BFI NETWORK	£5k-£25k	Approximately £330k	Support is offered in the form of a non-recoupable grant. ⁷⁶	2023/24
Made of Truth Short Film Fund	British Film Institute/Doc Society	Up to £25k	Approximately £161k	Funding is awarded in the form of a non-recoupable grant. ⁷⁷	2023
Early Development Fund	BFI NETWORK	£3k-£12k	Not available	Support is a non-recoupable grant, unless the project receives BFI Development Funding, then the same terms of funding apply to the early development, and BFI Development Funding. ⁷⁸	2024

⁷⁴ Full fund guidelines for the Doc Society Features fund can be found here: https://bfi.doc society.org/static/files/bfi/BFIDocSocietyFeatures_Guidelines.pdf

⁷⁵ Full guidelines and information on the BFI Discovery and Impact fund can be found here: <https://www.bfi.org.uk/get-funding-support/create-films-tv-or-new-formats-storytelling/bfi-filmmaking-fund-discovery-impact-feature-funding>

⁷⁶ Full guidelines for BFI NETWORK England short film funding is available at: <https://www.bfi.org.uk/making-application-bfi-network-england-short-film-funding>

⁷⁷ Full guidelines for the BFI Doc Society Made of Truth Short Film Fund can be found here: <https://docsociety.org/static/core/pdf/bfi/Made-of-Truth-BFI-Doc-Society-Short-Film-FUND-GUIDELINES.pdf>

⁷⁸ Full terms of funding for the Early Development Fund are available at: <https://www.bfi.org.uk/get-funding-support/bfi-network/bfi-network-funding-finder/making-application-bfi-network-england-early-development-fund#what-you-can-use-funding-for>

Table 16. Regional funds

Fund name	Administering body	Amount awarded	Total annual investment	Terms of funding	Year of most recent data
North East Screen Production Fund	North East Screen	£50k-£500k	£3.8m	Funding is offered as an equity investment and is recouped from commercial exploitation. NE Screen is also entitled to net profits proportionate to their investment. Grant funding may be offered in exceptional cases. ⁷⁹	2023
Liverpool City Region Production Fund	Liverpool Film Office	£100k-£500k	£3m	Not available	2024
West Midlands Production Fund	Creative UK	£100k-£500k	£2.1m	Projects must demonstrate clear potential for the fund to recoup its investment, and investment debt or equity must be matched £ for £ with equivalent private finance. ⁸⁰	2017/18
Yorkshire Content Fund	Screen Yorkshire	£10k-£500k	Approximately £1.8m	The Yorkshire Content Fund will charge an arrangement fee and is entitled to a share of profits. All investment must be matched with equal private investment, and YCF contributions should be on identical recoupment terms to private investment. ⁸¹	2024

⁷⁹ Full guidelines and conditions for North East Screen Production Funding can be found here: <https://northeastscreen.org/wp-content/uploads/2022/05/NEPF-Guidelines-28.11.2023.pdf>

⁸⁰ More detailed terms of funding for the West Midlands production fund are available at: <https://www.wearecreative.uk/support/film-tv/west-midlands-production-fund/>

⁸¹ Additional guidelines on the terms of funding for the Yorkshire Content Fund are available at: <https://www.screenyorkshire.co.uk/yorkshire-content-fund-guidelines/>

REACH Fund	North East Screen	£1k-£5k	Not available	REACH requires at least 50% cash match funding. Awards cannot be used retrospectively and must be spent externally. ⁸²	2024
REACH Plus Fund	North East Screen	Up to £25k	Not available	REACH requires at least 50% cash match funding. Awards cannot be used retrospectively and must be spent externally. ⁸³	2024
West Midlands IP Content Fund	Creative UK/Create Central	Up to £20k	Not available	Not available	2024

⁸² Additional detail on REACH Fund terms of funding can be found at: <https://northeastscreen.org/project/reach-funding/>

⁸³ Additional detail on REACH Plus Fund terms of funding available at: <https://northeastscreen.org/project/reach-plus/>

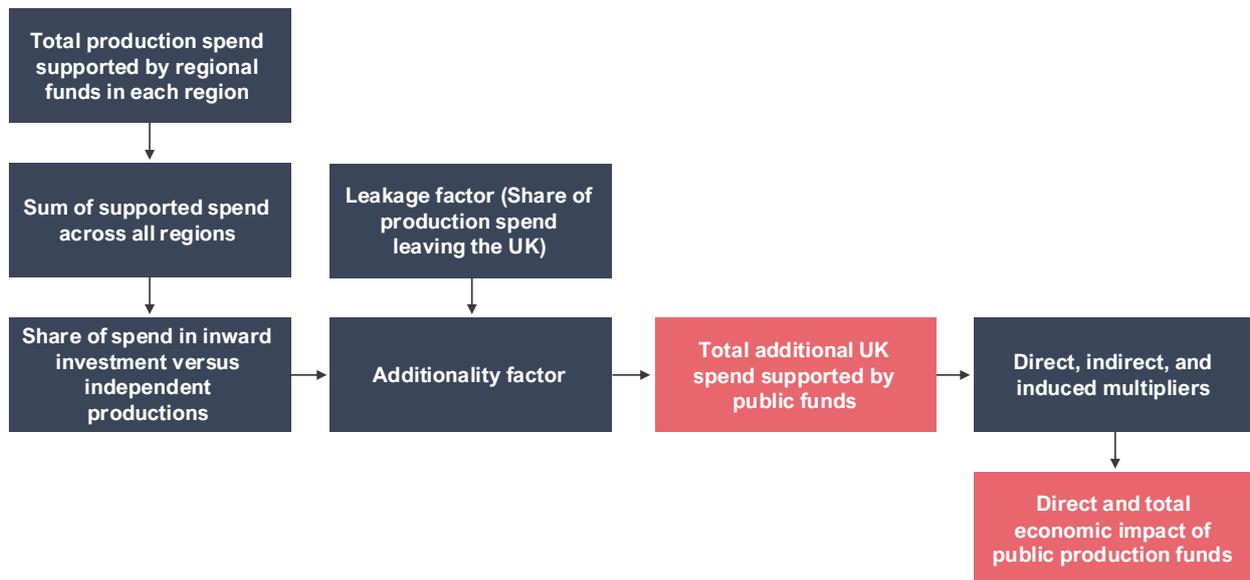
Annex B: Technical Annex

The following section outlines our approach to economic modelling, including a description of data inputs, key assumptions, and model workings.

Economic model workings

The following diagram provides an overview of the workings of the model, with data inputs in blue, and outputs in pink.

Figure 4. Economic impact model schematic



Our estimate of total production activity was adjusted to account for leakage (adjusting impact estimates downwards for production spend outside of the UK) and an additionality factor (reflecting the fact that some production activity would have occurred otherwise or be attracted by factors other than the availability of public funds). Total additional UK production spending supported by public funds was then multiplied by economic impact multipliers to estimate a measure of the direct and total economic impact (including direct, indirect, and induced effects) of direct public funding in the UK.

Input data and assumptions

This section outlines key input data and assumptions that underpinned the economic modelling presented in Section 2. Public funds in scope, and included in the model, included any funds supporting content production activity for feature films and television of any genre (including unscripted). While funds supporting short film and development activities are included in the mapping, they have been excluded from the economic model.

Production activity

Investment by direct public funds

The first step in calculating total production activity was to calculate the total investment by each fund. This information was collated through a desk-based review, reviewing fund guidelines, previous evaluations, and detailed financial statements. While in most instances, the total spend or investment by the fund was publicly available, data from multiple years was used, depending on the fund, with the oldest data point from 2017/18. We avoided inflating data from previous years, as funds may have been increased or decreased, independent of inflation.

For each fund (where possible), a sample of recently supported productions was identified and analysed to determine the share of support from each fund going toward co-productions, domestic, or inward-investment productions. For other funds, the focus of their investment was made clear by their eligibility criteria. For example, 100% of the BFI's Global Screen Fund Co-Production strand's spend is allocated to co-productions, and 100% of the Sinema Cymru Film Fund goes to domestic productions, supporting Welsh-language content specifically.

Production funding leveraged

We understand that securing direct public funding enables productions to attract or secure additional investment through the reduction of financial risk, amongst other factors. Public funds often typically contribute only a fraction of the overall production budget, with production companies leveraging other sources to complete the production budget (i.e., public service broadcasters, tax credits, international public funds, private investment).

Total investment from each fund was then summed and multiplied by the assumed share of production budget supported by public funds. This assumption was derived using data from the European Audiovisual Observatory (EAO) with figures adjusted based on input from producers interviewed in the research. The EAO reports different averages for low, medium, and high budget productions. In the model, we assume that domestic and co-productions are primarily low and medium budget productions, while inward investments are assumed to be high budgets. The EAO estimate corresponding to co-productions was halved, as we assume that a proportion of the public funding is coming from international public funds, in addition to UK funds. We adjusted all EAO estimates based on input from producers interviewed, who added that public funds typically support 8-20% of the total production budget.

Table 17. Assumed share of production budgets supported by public funds

Production type	Budget supported by direct public funds
Domestic	26%
Co-production	16%
Inward investment	18%

Source: Alma Economics analysis of European Audiovisual Observatory data and interview findings

This provides a measure of the total supported production budget by fund. Production activity for each fund was then summed based on the nation the fund applies to get a measure of production activity in each nation.

Share of spend remaining in the UK

We then calculated the share of spend attributable to each fund that remained in the UK, in order to account for leakage. HM Treasury's Green Book defines leakage as the extent to which effects of an intervention leak out of the target area (the UK in this case). The model assumed that the share of production budget remaining in the UK would differ based on whether the supported production was a domestic production, co-production, or inward investment production. As part of the Statistical Yearbook, the BFI publishes data on the share of inward investment, co-production, and domestic spend that remains in the UK by year. Data from 2020-2022 was averaged to calculate an average measure of the share of budget remaining in the UK.

Table 18. Share of spend remaining in the UK

	Share of spend remaining in the UK
Co-production	41%
Domestic	87%
Inward Investment	66%

Source: Alma Economics analysis of data from BFI Statistical Yearbook, 2023

This data was combined with the data collated on spend share from each fund going to different types of productions to determine the total spend from each type of production remaining in the UK, by nation.

Additionality

The HM Treasury Green Book requires economic impact to be measured on an additional basis, that is, measuring the extent to which direct public funds have generated additional benefits for the UK compared with a scenario in which this funding was not available. Our assumptions for additionality are informed by available evidence and a series of semi-structured interviews held with production companies that have received direct public funding from UK-based funds. In these interviews, producers were asked to estimate the probability that their production would have gone ahead in the absence of support from the public fund. Specifically, producers were asked:

On a scale of 0-10 (where 0 is definitely would have been made without the funding, and 10 is would never have been made without the funding), how did receiving the funding increase the chance of your project being made?

Our economic model assumes the following additionality rates:

- **75% of supported production activity is additional for domestic productions and co-productions.** This assumption is largely based on findings from semi-structured interviews with producers, detailed above. Overall, producers felt strongly about the role the receipt of public funds played in their productions, with many noting that some projects would not have been made without receipt of direct public funding. Not only does funding support a significant portion of domestic production budgets, it also helps to leverage other funding sources, by spreading risk and demonstrating commercial appeal.
- **25% of activity is additional for inward investment productions.** This assumption is based largely on analysis from the BFI's Screen Business Report (2021). Based on a survey of producers, the report found that for inward investment producers, the Film Tax Credit was 100%

additional, indicating that none of them would have chosen the UK for their projects in the absence of the Film Tax Credit. Based on this, it is likely that Tax Credits are drawing in the majority of inward investment productions and direct public funds likely play a relatively small role in the decision of international productions to shoot in the UK.

Economic impact multipliers

Our analysis used adjusted estimates of the multipliers derived in the BFI's Screen Business 2021 report for total production spend and direct, indirect, and induced gross value added and employment. As public funds support both film and television productions, blended multipliers were calculated for film and television production. Multipliers for the impact of production activity alone, as well as the wider film and television value chain - i.e., reflecting activity supported for distribution, broadcasters, exhibition, etc – were also used.

Table 13. Production sector economic multipliers

	Gross value added multipliers	Full time equivalent employment multipliers
Direct	0.6	11.2
Indirect	0.4	7.0
Induced	0.2	4.5

Source: Alma Economic analysis, using data from BFI Screen Business (2021)

The multipliers indicate the level of additional economic activity generated across different parts of the economy. For every £1 spent on film and television production, around an additional £0.60 is generated in the film and television industry, around an additional £0.40 is generated in supply chain industries serving the film and television production sector, and around £0.25 is created as employees in the sector spend wages on goods and services. These multipliers were multiplied by total additional production activity remaining in the UK, to estimate total direct, indirect, and induced GVA and employment generated by public production funds, for domestic, co-production, and inward investment productions.

Talent spillovers

Low budget films (i.e., those with budget levels below £15m) have historically been a catalyst for launching emerging on- and off-screen filmmaking talent, supporting their progression to larger and higher-profile film projects by allowing them to develop their skills, take creative risks, and raise their profiles. Previous analysis by Alma Economics evidenced this effect, finding that low budget films are substantially more effective at launching emerging talent than large budget films.⁸⁴

Putting a monetary figure on the positive externality resulting from talent incubation on films, the study found that every £1 of spend on the production budgets of low budget UK films supports around £0.20 of subsequent filmmaking activity. This represents an increase in UK screen sector economic activity

⁸⁴ Measuring the spillover benefits of UK independent films (Alma Economics, 2023). See: <https://www.pact.co.uk/static/a6b60ff1-3044-4495-b14db0559e5c367f/2f313373-baaa-492a-92cb97ba2ca0bf54/Measuring-the-Spillover-Benefits-of-Independent-Film-2023-Alma-Economics.pdf>

and makes a direct contribution to UK GDP. Our estimates of total GVA and employment have therefore been multiplied upward by an additional 20%, considering the talent spillovers associated with low-budget (typically domestic) production activity.

Wider film and television value chain – economic impact multipliers

In addition to estimating the economic activity generated by production activity alone, we also calculated economic multipliers for the wider film and television value chain, which includes distributors, broadcasters, exhibitors, and other market constituents directly involved in the process of bringing a production to audiences. Whilst this supported activity cannot be deemed fully additional, these multipliers illustrate the potential for increased production activity to permeate through the wider value chain.

Table 20. Value chain economic multipliers

	Gross value added	Full time equivalent employment
Direct multiplier	1.0	15
Total (direct, indirect, induced) multiplier	2.1	27

Source: Alma Economics analysis using data from Screen Business (2021)

The economic impact of production activity, as well as activity generated across the value chain, was then divided by the total fund spend in each nation to estimate the economic benefit per pound spent.



+44 20 8133 3192 43 Tanner Street, SE1 3PL, London, UK

Copyright © 2025 All rights reserved
Company Number 09391354, VAT Number GB208923405, Registered in England and Wales

 [company/alma-economics](#)

 [almaeconomics](#)

