

NFTS

**NATIONAL
FILM AND
TELEVISION
SCHOOL**

NFTS

**Graduate
Impact
Report
2020**



*Ricky Gervais on the set of **After Life** (Series 2) with NFTS Directing students Shane and Victoria shadowing him.*

An Introduction to the NFTS and this Report

For nearly half a century, the National Film and Television School (NFTS) has developed some of Britain and the world's top creative talent. It is widely acknowledged to be the top school of its kind in the UK and one of the best internationally.

In 2018, the NFTS was awarded both the BAFTA for Outstanding British Contribution to Cinema and the Queen's Anniversary Prize for Higher and Further Education.

The NFTS runs more behind-the-camera courses than any other film school in the world, including core craft areas such as directing and cinematography, as well as specialisms such as script supervision and production accounting. The school is supported by a wide range of individuals, companies and organisations.

This report was prepared by OC&C for the NFTS on a pro-bono basis to help build an understanding of its importance to the UK screen industries, primarily films and high-end TV (HETV). OC&C are a global strategy consulting firm founded in London in 1987 and are experts in the media sector.

The report contains five main sections:

SECTION 1:

**The Importance of Film & TV
to the UK Economy**

SECTION 2:

**The Critical Role of the NFTS
in High-End Television**

SECTION 3:

The Critical Role of the NFTS in Film

SECTION 4:

The Future Impact of the NFTS

SECTION 5:

Methodology



Introduction

This report demonstrates the enormous impact NFTS graduates make to the UK Film and Television industries, specifically High-End Television as well as inward investment in UK Film production and independent British Film.

This will not come as a surprise to many readers as alumni of the National Film and Television School are some of the UK's most significant and well-known creative talents, including names like Andrew MacDonald (*Trainspotting*, *28 Days Later*), Lynne Ramsay (*You Were Never Really Here*, *We Need To Talk About Kevin*), Roger Deakins (*1917*, *Skyfall*) and Danny Cannon (*CSI: Crime Scene Investigation*, *Gotham*).

But as the old adage goes, 'one swallow doesn't make a summer', so with the School approaching its 50th Anniversary in 2021 we asked OC&C to move beyond these well-known individual graduates and analyse the contribution and impact of NFTS graduates as a whole on UK Film and Television production over a five-year period, from 2015 to 2019.

The results proved even more startling than we expected.

This report shows that **NFTS graduates go on to become key creative leaders** for much of the UK's largest and most high-profile Film and Television content. Our graduates take leading roles as Heads of Department on some of the largest productions being made in the UK (£50m+) and often end up being dominant in a specific field. For example, we only graduate eight Cinematographers a year, but NFTS graduates shoot 25% of all high-end TV made in the UK.

The report also shows that **NFTS graduates often achieve success within a short window** (often under ten years). Krysty Wilson-Cairns (Screenwriting, 2011) won a BAFTA for her work on *1917* (She co-wrote it with Sir Sam Mendes) and worked alongside graduates Roger Deakins (Cinematography, 1975) and Stuart Wilson (Sound, 1994) who both won Oscars for their work on the film.

The report also shows that quietly and in a sustained way, the **NFTS has become more diverse and inclusive and is now increasingly representative of the UK population**. For example 1 in 4 students graduating between 2015 and 2019 was BAME British and, while there is obviously more we can and will do in this field, we believe that in time this will result in a more diverse UK Film and Television industry.

We would have liked to have gone further with this report in a number of ways. Notably, to have looked more fully at Television (beyond high end TV) but the amount of data involved makes it a difficult task. In a future report, we would also hope to look at our graduates' impact on other aspects of the value chain such as Distribution and Exhibition. In addition, as we grow our digital work, it will be important to quantify our impact on the Games industry.

I would like to thank OC&C for their analysis and the BFI for helping with the UK inward investment data. It is clear the impact of the NFTS is unparalleled. No other educational institution or talent scheme has the same impact on the Film and Television industry as the NFTS. Investment in skills at the NFTS can pay dividends within eighteen months, whereas often skills investment is targeted at new entrants only and therefore doesn't pay off for five to ten years.

Of course, not everyone who builds a successful career in Film and Television does or should come through the NFTS. There are plenty of other options. However, no other single education institution or scheme can point to a record of accomplishment that has delivered talent and skills for the industry on the scale of the NFTS.

In 1971 when the Government set up the 'National Film School', as it was first titled (with Television added almost 20 years later), it said that it hoped that a *'training School such as this would be a shot in the arm for the Film industry in the UK'*. 50 years later, I think we can say it has not only been a success but has grown to become a leading global institution. **Moving forward we will continue to produce the people that power production.**



Jon Wardle,
Director
National Film & Television School

NFTS in Numbers

Established by
the Government

1971

Number of
Graduates

3933

Annual MA and
Diploma Intake (FTE)

268

Specialist
Courses

34

Average
Class Size

10

Number of BAFTA
Nominations for
Graduates

450

Graduate
Employment Rate

93%

Executive Summary

1. THE UK FILM AND TELEVISION INDUSTRY IS CRITICALLY IMPORTANT

The UK audio-visual production industry has recently experienced a “golden age” as strong growth in the film industry has been complemented by growth in the adjacent categories of high end TV, video games and animation.

Growth in UK Film & HETV spend has been fuelled by increases in high-budget, inward-investment productions. Not only do these result in award winning on-screen content, **but they also generated a large (and growing) trade surplus of over £900m in 2016**, and offer a large intangible cultural contribution from global viewership.

The audio-visual production industry is an important and growing contributor to the UK economy, **outpacing the wider creative economy; creative economy annual GVA growth 2014-17 was +6% vs. film industry annual GVA growth of +16% and HETV annual GVA growth of +15%**. This rapid growth in the screen sector **is creating high-quality jobs** across the breadth of the UK.

2. THE NFTS PLAYS A CRUCIAL ROLE IN SUPPORTING UK AUDIO-VISUAL PRODUCTION

The NFTS is a highly important contributor to all parts of the audio-visual production industry, with graduates involved in **83% of HETV production, c. 75% of subscription video on demand (SVOD) HETV production and 85% of UK film production**.

NFTS graduates are centre-stage in the growth of all HETV inward investment projects in the UK, with **67% of total investment involving an NFTS graduate** in the 12 behind-the-camera ‘key roles’¹, supporting both UK broadcasters and global SVOD leaders alike.

The NFTS contribution to film is more important than ever as the industry mix has moved towards higher-budget productions, where NFTS graduates have the strongest presence. NFTS graduates participate in key roles in films accounting for over 54% of total film production spend.

3. THE NFTS IS SUPPORTING THE INDUSTRY’S ONGOING MOVES TOWARDS INNOVATION, REGIONALISATION AND DIVERSITY

NFTS graduate impact **continues to grow and recent graduates are making exceptional contributions across the screen sector** and simultaneously acting as a flag-carrier for improvements in industry diversity. Graduates have a wide range of skills that are **suited towards the diversifying nature of the screen industry** – recent graduates have moved into digital roles and videogame production, capitalising on the skills they have acquired at the NFTS. Furthermore, the NFTS is opening schools in Glasgow and Leeds to **support job growth across the UK and is championing diversity in the industry**. Recent cohorts of graduates having a virtually equal gender balance and over 20% BAME students; this is laying the foundations for improvements to longstanding industry diversity issues.

¹key roles are key creative roles or leading production departments and are defined in the methodology

1917

Alumnus Stuart Wilson AMPS led the Oscar and BAFTA-winning Sound team which included alumni Linda Brenon and Thomas Fennell.



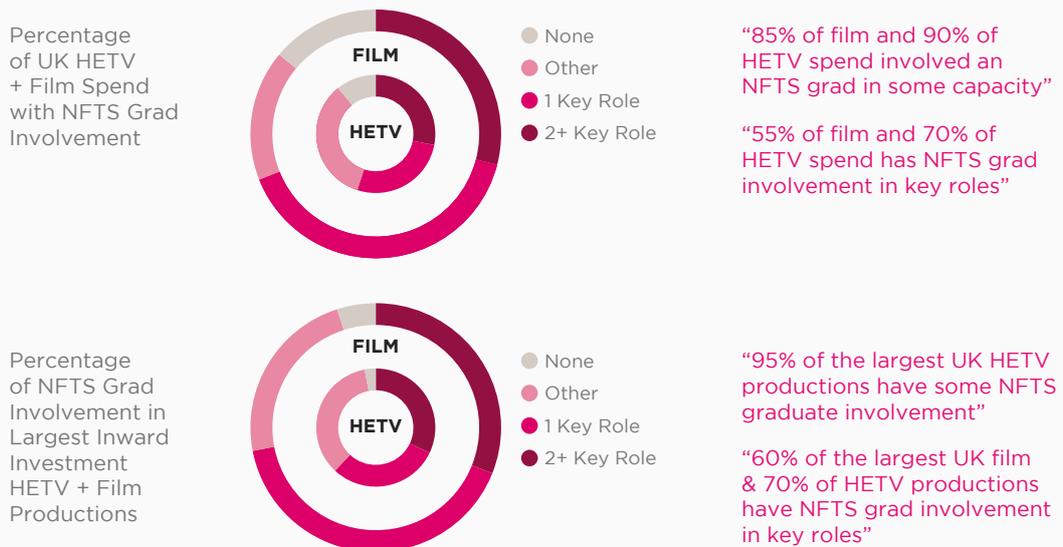
The Headlines...

- Two thirds of all UK HETV spend is on content with at least 1 NFTS graduate in a key role
- 85% of UK broadcaster spend on HETV and two-thirds of all Netflix productions have at least 1 NFTS graduate in a key role
- Over 50% of the biggest UK box office successes since 2015 have had at least 1 NFTS graduate in a key role
- 97% of the biggest budget inward investment films have NFTS graduate involvement
- 33pence in every pound spent on the biggest budget UK films have 2 or more NFTS graduates in key roles
- 1 in 4 recent NFTS graduates are BAME vs. only 3% in the industry overall

The audio-visual production industry is critically important to UK plc



The NFTS plays a crucial role in supporting UK audio-visual production



The NFTS is supporting the industry’s moves towards innovation and diversity



“At Working Title we pride ourselves on working with the best of British talent, and from the Darkest Hour to Hail, Caesar! NFTS graduates have been at the heart of many of our projects. We are huge supporters of the School.”

Tim Bevan CBE and Eric Fellner CBE
(Co-Chairmen, Working Title Films)



Section 1

The Importance of Film & TV to the UK Economy

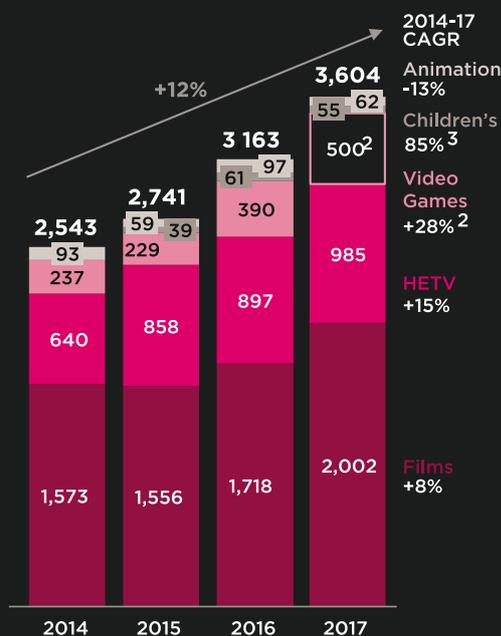
PRODUCTION SPEND IN THE SCREEN SECTOR IS GROWING RAPIDLY - OUTPACING THE WIDER CREATIVE INDUSTRY AND UK ECONOMY, DRIVING INWARD INVESTMENT.

Film production spend in the UK (as defined by the BFI, see methodology), has experienced considerable growth in recent years. Total production spend has increased from £1.5bn to £3.7bn from 2012 to 2017 and the average UK production spend per film has increased from £2.7m to £7.5m between 2012 to 2017.

This increase has been driven by two key trends:

- Inward investment is key for the growth and scale of the UK screen sector and has grown in importance. In 2017 inward investment composed 87% of total feature film production costs.
- Big budget productions represent a larger share of total spend, which has more than offset the decline in the number of small budget feature films.

Figure 1. Value of Production Spend in the UK by Type, 2014-17 (£m)

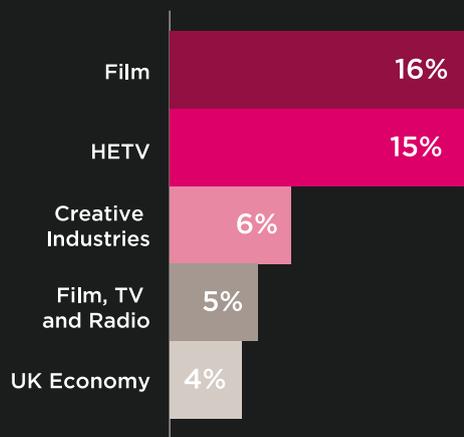


1. Includes trademarks, franchises, brands and design rights; copyrighted works, sound recordings, films, TV programmes and royalties

2. Services and fees related to the production of motion pictures

The film industry does not operate in isolation, with adjacent categories of HETV, video games and animation also experiencing rapid growth. Film and HETV growth in GVA from 2014-17 has been +15% annually, which far exceeds the wider creative industries (+6%) and the UK economy (+4%). Video game production spend is also increasing significantly with annual growth of c. 30%. An attractive UK tax environment encouraging inward investment, a highly skilled labour force and growth in on-demand services has helped drive this growth across the screen industries.

Figure 2. Growth in GVA by Segment, 2014-17 (% Annual Growth)



High GVA growth supported by large export value of UK screen industries

The rapid growth of the sector drives subsequent job generation in the UK – **these new jobs have significantly higher GVA per FTE than the UK average** (£88,500 in the audiovisual sector vs. the national average of £54,900) so offer significant economic benefits. The screen industry is also **increasingly driving job growth beyond the South East** with domestic broadcasters relocating out of London and higher education institutes opening satellite campuses.



Calm With Horses is the directorial feature film debut of 2015 graduate Nick Rowland and Screenwriting graduate Joe Murtagh.

Photographer: Martin McGuire.
Copyright: Fair Play Productions Limited/Element Pictures Limited/Channel Four Television Corporation 2018

THE UK SCREEN SECTOR HAS GLOBAL REACH AND A SIZEABLE TRADE SURPLUS...

The UK film industry (as defined by the BFI, see methodology), has a strong export performance, with intellectual property royalties from content and other audio-visual services attracting global demand. The industry runs a large and growing trade surplus (c. £1bn in 2016), producing films that attract a global audience. This trade surplus has increased significantly since the 2000s and is indicative of the successes of the industry in recent years.

The highest budget productions have truly global audiences and very high global export value (**over 90% of their revenue can originate from international markets**).

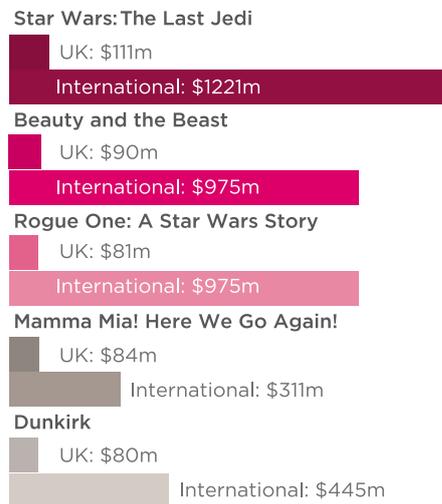
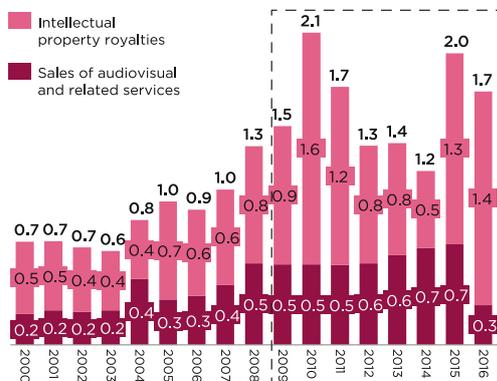


Figure 3. UK Film Industry Exports (£bn)

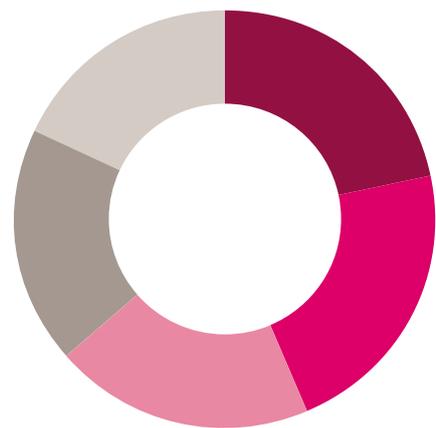


3. Includes trademarks, franchises, brands and design rights; copyrighted works, sound recordings, films, TV programmes and royalties
 4. Services and fees related to the production of motion pictures

...AND UK CLASSIFIED FILM CONTENT HAS A GROWING PRESENCE IN A DIVERSE RANGE OF MARKETS GLOBALLY, SUPPORTING BROADER GLOBAL CULTURAL OBJECTIVES.

Approximately **one-fifth of worldwide gross box office sales are from UK classified films** (as defined by the BFI, see methodology), supporting the role of the UK as a cultural leader with a voice on the global stage. The share of box office sales from UK classified films has **grown considerably from 2013** where this figure was approximately one-tenth. The screen industries provide an opportunity to promote the UK as a desirable place to work and visit, alongside promoting British values.

UK classified films have a high share of international film markets in Singapore, Australia, USA, Brazil, Netherlands and Germany. These are large economies with significant strategic importance to the UK – the value of a strong screen presence cannot be underestimated. The strong presence of the British screen industry in non-Anglophone markets also highlights the value of the screen industries in **promoting the English language internationally** and supporting the British Council’s goal of continuing to promote the English language worldwide.



UK share of international film markets

- Singapore 32%
- Australia 32%
- USA 29%
- Netherlands 27%
- Germany 26%

Section 2

The Critical Role of the NFTS in High-End Television

NFTS GRADUATES PLAY KEY ROLES IN SHAPING HIGH BUDGET TELEVISION PRODUCTIONS.

The success of the UK HETV industry relies on highly-skilled creative professionals. NFTS graduates are extremely well-qualified for roles in HETV; they are taught intensively by industry professionals in small groups, have access to a range of state-of-the-art facilities and participate in once-in-a-lifetime masterclasses from world renowned TV makers. Consequently, they are heavily involved in HETV production, **contributing to projects with a combined budget of c.£7bn since 2015.**

Two-thirds of all production spend on HETV in the UK has at least one NFTS graduate in a key role. The presence of so many NFTS graduates in key roles gives the NFTS a unique role in shaping the creative direction of HETV. Graduates from the NFTS have had roles

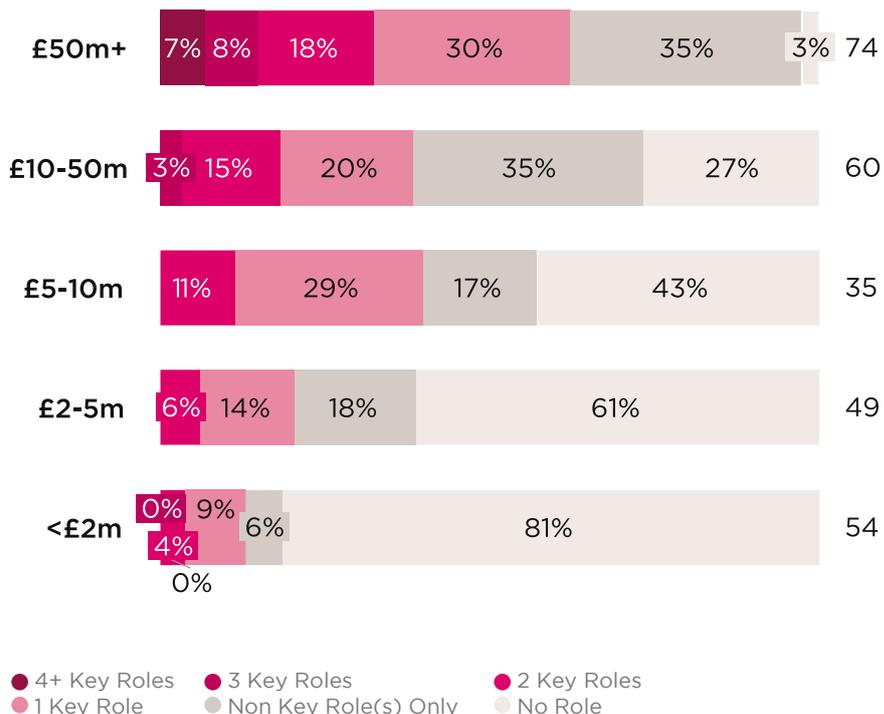
in many award-winning HETV shows and their influence in the industry is growing with every graduating cohort.

NFTS graduates over index on high budget productions due to their industry-leading reputation and skills.

- 95% of the highest budget HETV productions have NFTS graduate involvement, including 73% having one or more in one of the 12 key roles.
- 35% of largest HETV productions have two or more NFTS grads in key roles.

Two-thirds of all production spend on HETV in the UK has at least one NFTS graduate in a key role.

Figure 4. % of HETV Projects with NFTS Grads in Key Roles by Budget, 2015-19 (#, %)





*The BAFTA-winning and Oscar-nominated **For Sama** featured the graduate involvement of Editor, Chloe Lambourne and Composer, Nainita Desai.*

CHERNOBYL



“NFTS graduates shot, designed and mixed the sound for Chernobyl. They all went on to win Emmy’s for their work. I don’t know what they are putting in the water at the NFTS. But long may it continue!”

Jane Featherstone
(Founder and Chief Executive, Sister Pictures)

ONE RECENT EXAMPLE OF NFTS GRADUATE ACHIEVEMENT WAS THE PRODUCTION OF CHERNOBYL, ONE OF THE BIGGEST HIT SHOWS OF 2019



Jakob Ihre - 2000
Cinematographer

Emmy
WINNER: Outstanding Cinematography for Limited Series or Movie for **Chernobyl**

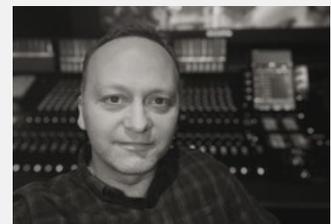
Winner of NFTS ‘Sue Gibson’ alumni award for ongoing contribution to Cinematography



Luke Hull - 2010
Production Designer

Emmy
WINNER: Outstanding Production Design for a Narrative Period or Fantasy Program for **Chernobyl**

Currently Production Designer on the new Star Wars Cassian Andor TV series



Stuart Hilliker - 1998
Re-Recording Mixer

Emmy
WINNER: Outstanding Sound Mixing for Limited Series or Movie for **Chernobyl**

Winner of 4 BAFTAs

NFTS IS PARTICULARLY STRONG IN CINEMATOGRAPHY WITH A ROSTER OF HIT HETV SHOWS EMPLOYING A NFTS CINEMATOGRAPHER.

NFTS graduates are involved in a broad range of key roles in both HETV and film production. However, they are particularly renowned for excellence in cinematography - NFTS Cinematography graduates have shot 154 HETV projects since 2015 - this is 25% of all HETV productions in the UK.

The cinematography course at NFTS is the only two-year specialist cinematography MA in the UK. Exercises, workshops, masterclasses and productions, supported by critical study of the history and development of cinematography give students a solid foundation in the art and craft of their future career.

In 2019/20 alone, alumni of the cinematography course won the Academy Award (Oscar), BAFTA, Emmy, RTS (Royal Television Society) Award and industry awards at the American and British Society of Cinematographers.

NFTS cinematography graduates have shot 154 HETV projects since 2015 - this is 25% of all HETV productions in the UK.



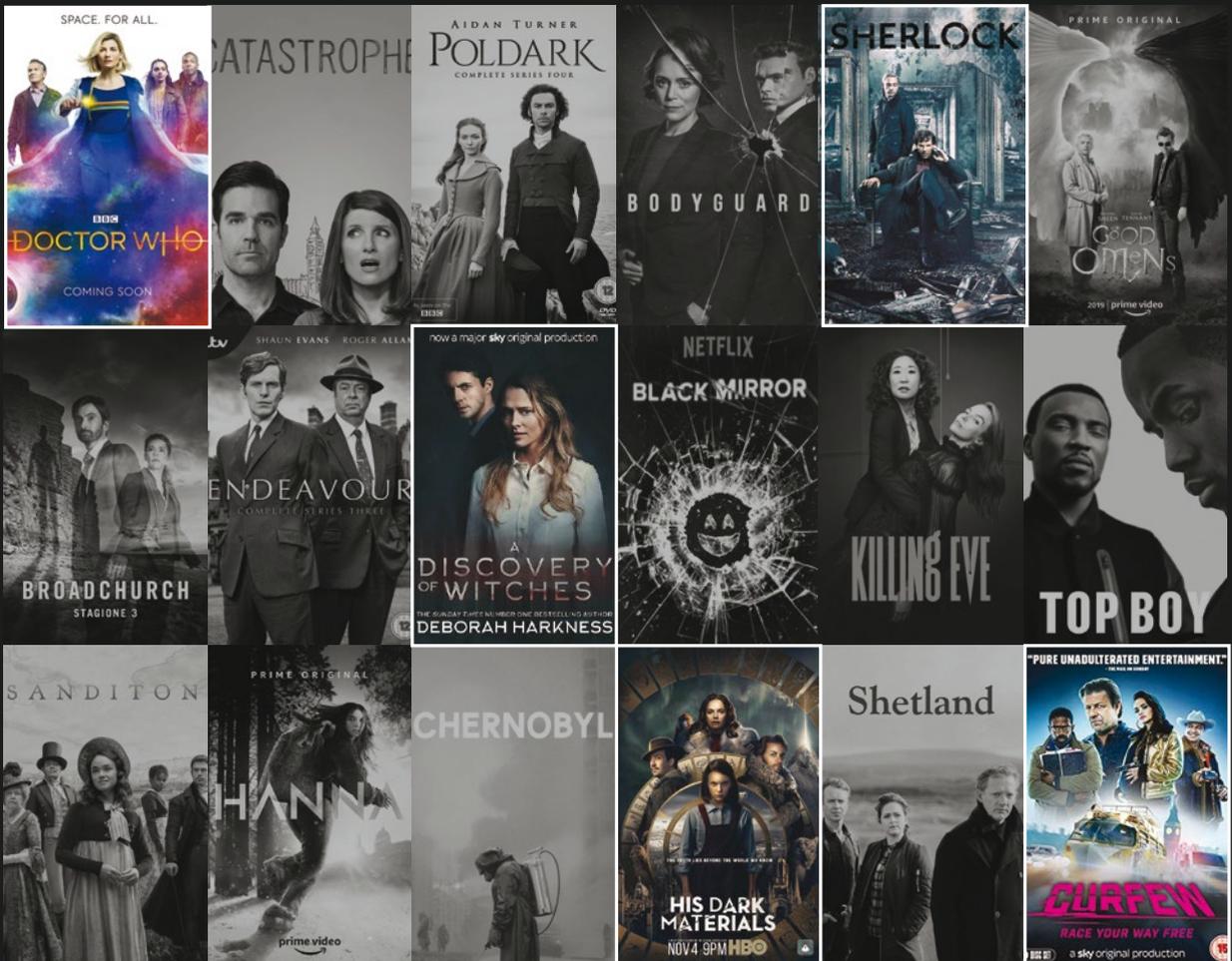
*Jakob Ihre on the set of **Chernobyl**. Jakob won an Emmy for his work on the mini-series.*



**Suzie Lavelle - Class of 2006
Cinematographer**

Elected as a member of the British Society of Cinematographers in 2019
Nominated for a Primetime Emmy for Outstanding Cinematography in 2016

Suzie Lavelle ISC BSC has shot **5 of the 18 biggest HETV shows** in the last five years



NFTS GRADUATES HAVE INTEGRAL ROLES IN HETV MADE BY BRITISH BROADCASTERS...

There are a multitude of British and international studios that commission the making of HETV in the UK. Assessing the participation of graduates across productions from these studios is a key way of quantifying the impact of graduate schools.

NFTS graduates are centre-stage in the growth of all HETV inward investment projects in the UK, with **70% of total investment involving an NFTS graduate**

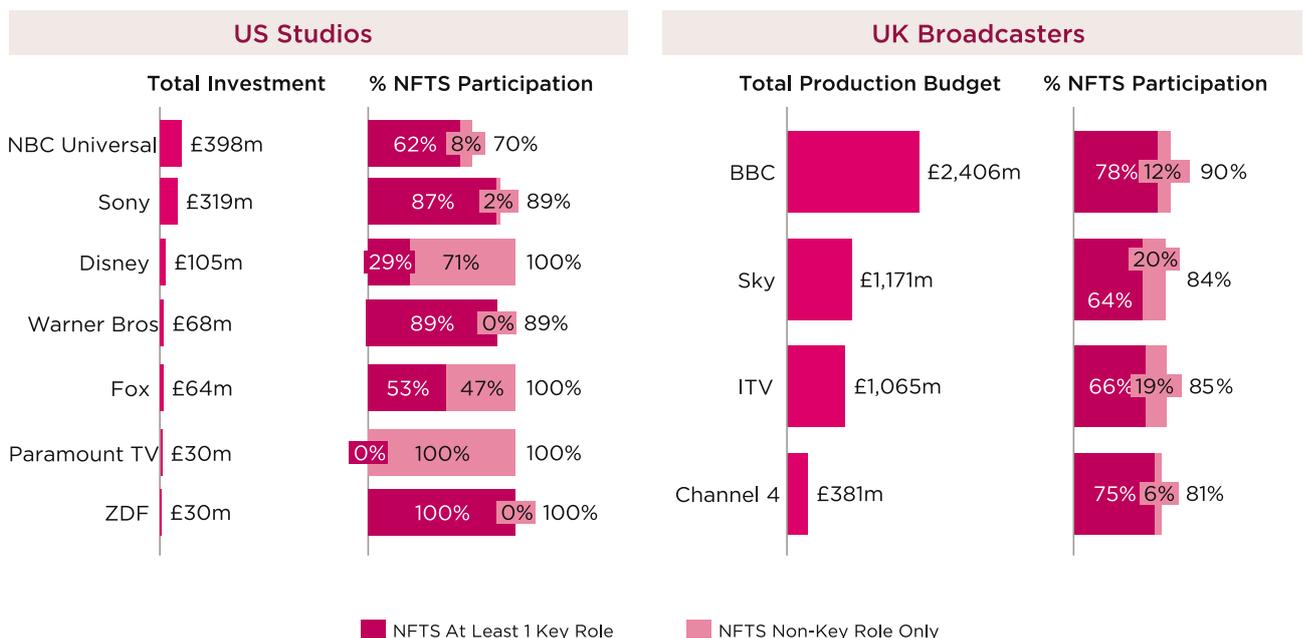
in a key role. The presence of these highly-skilled graduates is undoubtedly a driver in making the UK an attractive place to make high-end television and driving inward investment. NFTS graduates work across the leading US studios and are involved with the majority of their UK projects, totalling nearly £1bn of inward investment.

Within the domestic market, **at least 80% of UK broadcaster spend on HETV projects involves an NFTS graduate. The BBC employs NFTS graduates in key roles in 78% of their productions.**

Composer Segun Akinola was hired within 12 months of leaving the NFTS to compose the music for the BBC's *Doctor Who*.



Figure 5. NFTS Graduate Involvement in Largest HETV Studios & Broadcasters



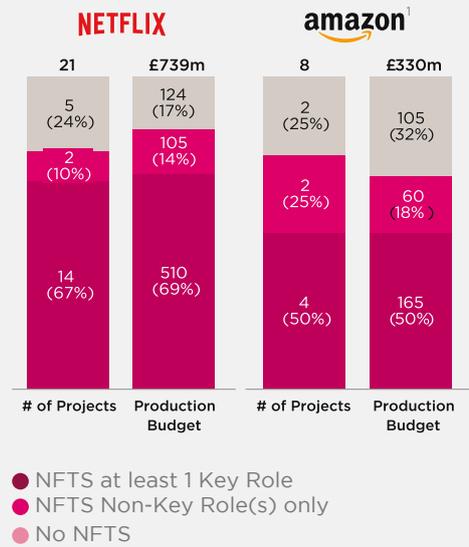
...ALONG WITH SUPPORTING INTERNATIONAL VOD PLAYERS COMMISSIONING HETV.

Dramatic growth in global video-on-demand (VOD) users has caused a seismic shift in the way content is consumed. The UK is one of the most advanced VOD markets globally, with international and domestic offerings available to consumers and competing for viewership. This landscape has led to growth in HETV; creation of exclusive, high-quality content is fundamental for subscriber growth and retention. NFTS graduates have helped produce the content that has fuelled this growth and have a strong presence in subscription video on demand (SVOD) productions. As the industry landscape continues to evolve the crucial role of HETV and the NFTS graduates appears likely to continue.

Although the VOD offerings of the UK national broadcasters have the largest audiences in the UK, audience growth has been driven by the two largest international VOD players – Netflix and Amazon Prime Video. **Between 2016 and 2018 Netflix and Amazon Prime Video increased UK subscriber numbers by 6.4m between them. Two-thirds of all £ spent on HETV in the UK on Netflix productions involve at least one NFTS graduate in a key role.**

Many of the leading UK SVOD productions involve NFTS graduates. Industry change and the rise of new content creators has not changed the vital role that the school plays in creation of world-class content.

Figure 6. Share of Productions (#) and Budget (£m)¹ 2015-2019 (%)



“There are NFTS graduates in every department on The Crown and they have made a fantastic contribution to the quality and consistency of the series. The NFTS punches well above its weight. It is hard to think of any other school which contributes so much creatively and so effectively to our industry.”

Andy Harries OBE
(Chief Executive, Left Bank Pictures)

More than a dozen NFTS graduates have worked on each of the four seasons of the Emmy winning **The Crown**.



Section 3

The Critical Role of the NFTS in Film

NFTS GRADUATES REGULARLY PLAY KEY ROLES IN HIGH BUDGET FILM PRODUCTION, WRITING, DIRECTING, PRODUCING AND ARE RESPONSIBLE FOR CINEMATOGRAPHY, VISUALS AND SOUND.

The continued success of the UK film industry is dependent on access to highly-skilled creative professionals. NFTS graduates are exceptionally well-trained for key creative and lead production roles in film and are heavily involved in film production, **contributing to projects with a combined budget of c.£9bn since 2015**, constituting 85% of total UK film production spend. Over half of all film production spend production in the UK has at least one NFTS graduate in a key role.

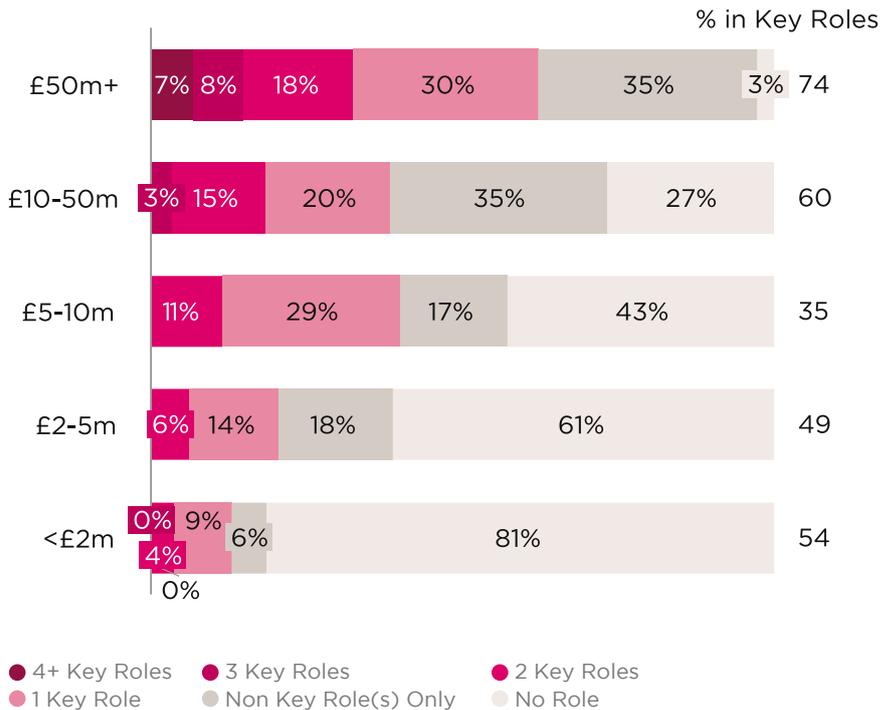
NFTS graduates are often in the spotlight in the film industry, playing key roles in blockbuster inward investment film projects. These high-profile, high-budget projects attract the industry’s best talent and the prominence of NFTS graduates in these productions is an indication of their achievements.

- 97% of the highest budget films have NFTS graduate involvement, with 62% productions having graduate involvement in a key role.
- 35% of largest film productions have two or more NFTS graduates in key roles.

“We couldn’t have made 1917 without the incredible skill and craftsmanship of NFTS graduates. Cinematographer Roger Deakins, co-writer, Krysty Wilson-Cairns, and our sound recordist Stuart Wilson all won Baftas for their work on the film, with Roger and Stuart going on to win Oscars as well. Truly amazing!”

Dame Pippa Harris
(Co-founder, Neal Street Productions, Chair of BAFTA)

Figure 7. % of Films with NFTS Graduates in Key Roles by Budget, 2015-19 (#, %)





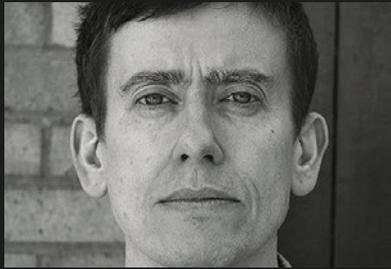
Roger Deakins
Class of 1975
Cinematographer

Won his second Oscar in 2020 for '1917', his 15th nomination for Best Cinematography
Awarded a CBE in 2013 for 'Services to Film'



Krysty Wilson-Cairns
Class of 2012
Writer

Co-wrote '1917' with Sam Mendes
Writer for horror HETV series 'Penny Dreadful'
Currently working on 'Last Night in Soho' with Edgar Wright



Stephen Swain
Class of 2000
Art Director

Art Directors Guild - 2x 'Excellence in Production Design' award winner
Previously acted as Art Director for 5x Star Wars movies, Death on the Nile & Artemis Fowl



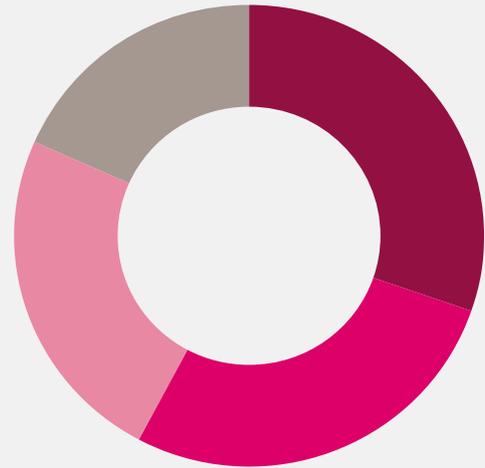
Stuart Wilson
Class of 1994
Production Sound Mixer

Production Sound Mixer for 5x Star Wars movies, 4x Harry Potter movies, plus Skyfall, Warhorse and many more
Won an Oscar and BAFTA in 2020 for his work on '1917'

NFTS GRADUATES HAVE INTEGRAL ROLES IN BRITISH-MADE FILMS AND THOSE THAT ARE FUNDED BY INWARD INVESTMENT...

There are a multitude of British and international studios that commission film-making in the UK. Assessing the participation of graduates across productions from these studios is a key way of quantifying the impact of graduate schools.

US studio investment from 2015-19 represents £5.9bn of spend (**75% of total film inward investment**). NFTS graduates work for the largest US studios on the majority of their film projects – this comprises over 90% of all productions. Disney has NFTS graduates in key roles in 84% of their total production spend. There are few corners of international studios that do not involve the NFTS – these studios would have access to a smaller and less well-trained talent pool without the NFTS.



Total investment by studio

- Disney – £1.39Bn
- Universal – £1.26Bn
- Warner Bros – £1.09Bn
- 20th Century Fox – £0.83Bn

NFTS graduates work for the largest US studios on the majority of their film projects – this comprises over 90% of all productions.

NFTS graduates have also played key roles in the most successful British films; graduate involvement has covered a wide range of major studio films and independent films. Over one in two of the biggest British box office successes since 2015 have had an NFTS graduate in a key role. NFTS talent is at the core of the UK film industry and is crucial in the export of quality, homegrown content.

Alumnus David Yates has directed four Harry Potter films and both Fantastic Beasts films. Pictured on the set of Fantastic Beasts: The Crimes of Grindelwald.





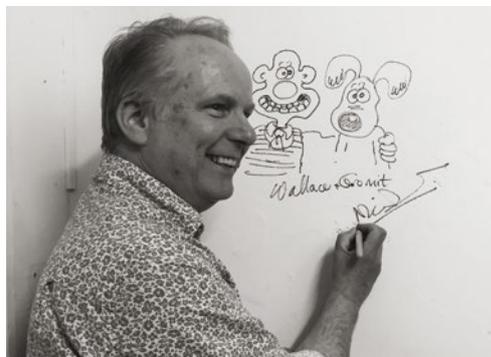
NFTS Alumni have worked in the VFX departments of films and television ranging from **Avengers: Endgame** to **1917**, **His Dark Materials** to **Game of Thrones**.

...WITH THEIR CONTRIBUTION TO ANIMATION GLOBALLY RECOGNISED.

The full spectrum of the feature film landscape has seen outstanding contributions from NFTS graduates; they are working across a wide range of genres, from romance to horror. However, the NFTS is particularly renowned as a world-leading centre of animation. The NFTS offers famed courses in “Directing Animation”, “Character Animation” and “Model Making for Animation”, amongst others. The school was named as **one of the top five animation schools in the world** in the Animation Career Review 2019

School Rankings and student work from the School won the BAFTA for Best Short Animation for five years running from 2014 to 2018.

Legendary animator Nick Park and creator of Wallace & Gromit, Creature Comforts & Shaun the Sheep is an NFTS alumnus, whose recent animated features “Early Man” (2018) and “Farmageddon” (2019) have been highly successful at the box office and won critical acclaim. His legacy lives on at the NFTS, with cohorts of talented animators graduating every year equipped with the skills to make their mark on the industry.



Nick Park – Class of 1985 Director

Legendary **animator and creator** of Wallace & Gromit, Creature Comforts & Shaun the Sheep.

His 2000 film Chicken Run remains **the highest-grossing stop motion animated film of all time**.

Oscars: 4x Winner and 6x Nominee .

His NFTS graduation piece ‘A Grand Day Out’ won him his first BAFTA.



Mark Baker – Class of 1988 Director/Writer/Animator

Nominated for three Oscars.

Created the multi-award winning series ‘Peppa Pig’ which has been nominated for 18 BAFTAs.

Peppa Pig is one of the most distributed animated series in the world.



Richard Phelan – Class of 2011 Director

Nominated for a BAFTA.

Co-Directed A Shaun the Sheep Movie: Farmageddon (2019).

A Shaun the Sheep Movie: Farmageddon has grossed over \$30m, and is the 16th highest grossing stop motion film of all time.

Section 4

The Future Impact of the NFTS

NFTS GRADUATE DIVERSITY IS WELL IN ADVANCE OF THE INDUSTRY AND IS LAYING THE FOUNDATIONS FOR IMPROVEMENTS IN INDUSTRY DIVERSITY AND REGIONAL GROWTH.

The NFTS has had a pronounced impact on the UK screen industries and an illustrious list of alumni since its inception. Furthermore, it is well-placed to maintain its global reach and capitalise on the diversification of the screen industry; the school **has continued to innovate by introducing new courses, new modes of course delivery and taking steps to attract a more diverse talent pool.** There has been demonstrable success from these

initiatives and the importance of NFTS graduates across all areas of the screen industries has continued to grow.

The evolution of the screen industry is being strongly supported by cohorts of NFTS graduates that **are equipped with the skills required for success in growth areas of the screen industry.** Recent graduates have taken digital roles (e.g VFX Producer/Supervisor) and roles within the videogames sector, capitalising on the skills they have acquired at the NFTS from newly introduced courses. Furthermore, the recent NFTS school opening in Glasgow and the upcoming NFTS school in Leeds demonstrates a **renewed commitment from the NFTS to distributing the rich benefits of the industry countrywide.**

“NFTS graduates have been at the heart of the UK film industry for five decades, from Bill Forsyth to Nick Park and Lynne Ramsay to Shola Amoo. We are extremely fortunate to have one of the world’s top Film Schools in the UK, that not only has such great heritage, but also continues to train exciting new filmmaking voices that make an impact on the world stage.”

Ben Roberts
(Chief Executive, BFI)



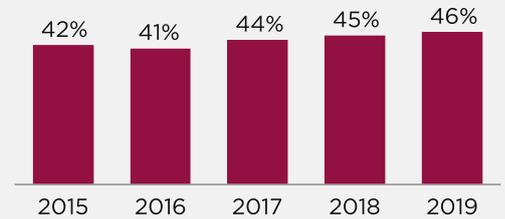
*Shola Amoo on the set of his BFI-backed second feature **The Last Tree**. Shola won the Writers Guild of Great Britain award for the screenplay.*

NFTS GRADUATE DIVERSITY IS LAYING THE FOUNDATIONS FOR IMPROVEMENTS TO INDUSTRY DIVERSITY AND REGIONAL GROWTH.

“The film and TV industry is not gender balanced, particularly at more senior levels - only 1 in 5 key production personnel working in the UK in 2015 were women”

The Work Foundation

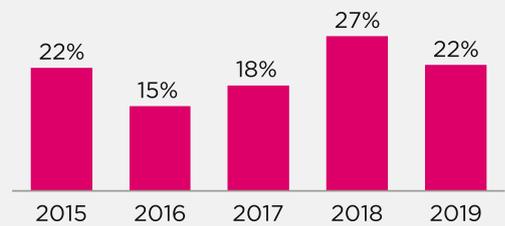
Figure 8. Female % of NFTS MA Course Students



“In industry production roles, only 3% of employees are from a minority ethnic background, compared to 12.5% nationally”

The Work Foundation

Figure 9. BAME % of NFTS MA Course Students



A 2016 study by The Work Foundation found that the majority of senior industry stakeholders (36 of 42) cited the lack of workforce diversity as the biggest challenge facing the UK film and screen industries.

Sex Education was written and created by Screenwriting graduate Laurie Nunn.



THE NFTS IS COMMITTED TO SUPPORTING THE GROWTH IN OUT OF LONDON PRODUCTION AND IS ESTABLISHING HUBS IN THE NATIONS AND REGIONS.

Currently only around one-third of commissioning and production budgets are spent outside London. The landscape is quickly changing, however, with both the BBC and Channel 4 outlining plans to significantly increase the proportion of their content spend outside of London and the South East. As broadcasters spend more of their content budgets in the nations and regions, the demand for local skilled labour grows.

In 2017 the School secured a grant from the Scottish Government to open a new hub in Glasgow and in early 2020 the School opened a second hub in Leeds. These hubs will enable the School to better respond to the needs of the local production economy. The industry has warmly welcomed these new developments and demand for places on the course provision developed to date has outstripped supply.

THE NFTS ALREADY DELIVERS MORE SPECIALIST BEHIND THE CAMERA COURSES THAN ANY OTHER FILM SCHOOL IN THE WORLD BUT CONTINUES TO MOVE INTO NEW AREAS TO SUPPORT THE WIDER AUDIO-VISUAL SECTOR.

Since 2015 the School has significantly increased its student numbers expanding its course portfolio to broaden its focus and thus support the wider audio-visual parts of the creative industries. The School now delivers specialist courses in subjects including Distribution, Exhibition, Production Accounting and Games. Recently it announced new provision in Casting.

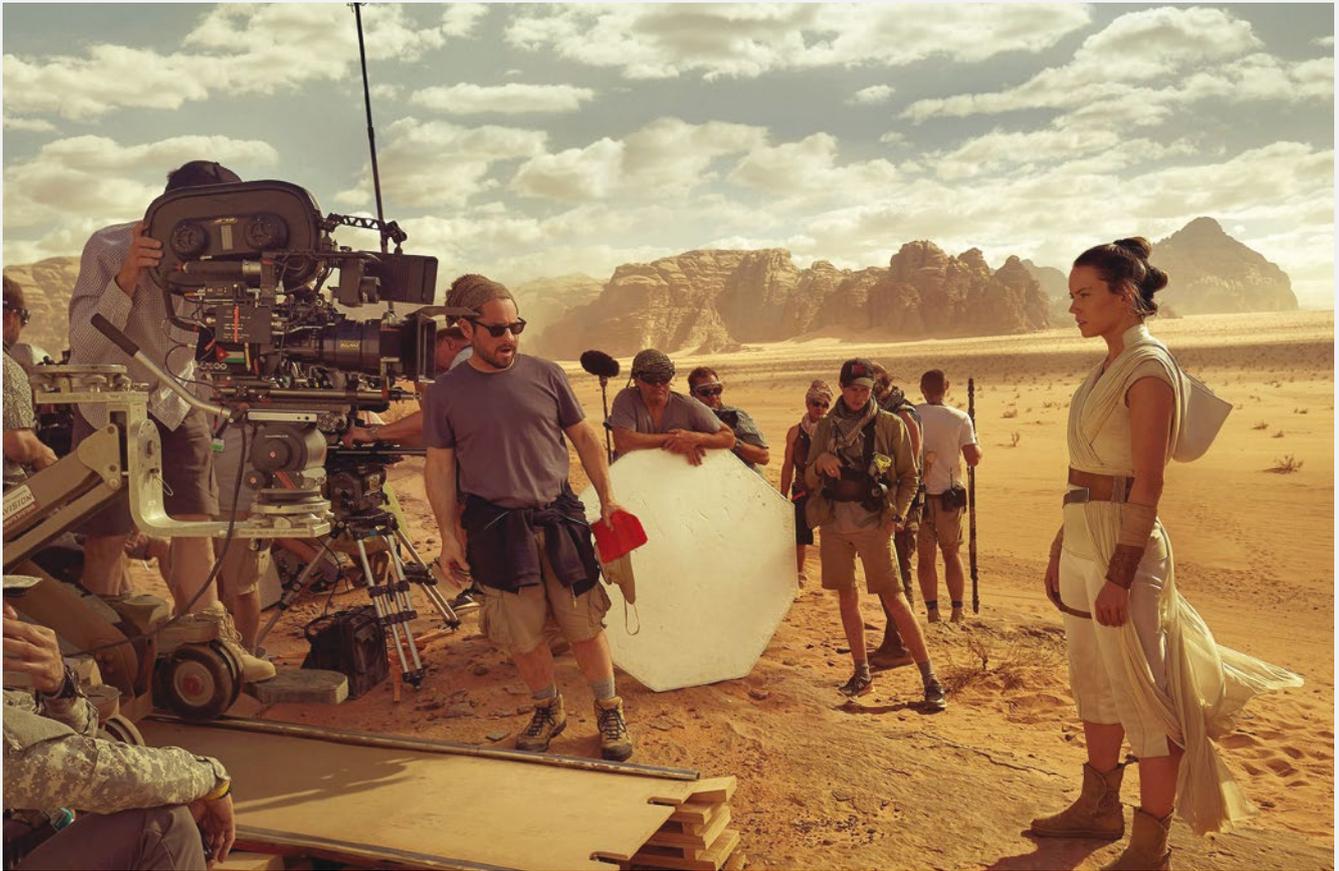
In 2019 the School established StoryFutures Academy: The National Centre for Immersive Storytelling, alongside its partner Royal Holloway, University of London. The work is funded as part of the UK Research and Innovation Audience of the Future Industrial Strategy Challenge Fund. As part of this project the School is developing a suite of new courses to ensure the UK creative workforce is the most skilled in the world.

Oscar-winning Director Asif Kapadia visits the NFTS for a workshop organised by StoryFutures Academy: The National Centre for Immersive Storytelling.



Section 5

Methodology



Seventeen NFTS graduates worked on *Star Wars: The Rise of Skywalker* including Production Sound Mixer, Stuart Wilson and Art Director, Patrick Harris.

In order to assess the market and characterise the NFTS graduate contribution various different external and internal data sources were used. However, there is limited data available for determining graduate contribution of other schools – illustrative examples have been used. Contributory data sources include:

- BFI Film and Production dataset of all UK-classified HETV and Films by year, sourced through internal surveys of production studios
- Data on Graduate Participation provided by the NFTS
- IMDB Pro
- United Kingdom Creative Industry Industrial Strategy 2018
- Oliver & Ohlbaum – “The contribution of the UK-based film, TV and TV related industries to the UK economy, and growth prospects to 2025” – 2018
- Work Foundation ‘Skills Audit of the UK Film and Screen Industries’,

Key roles are defined by the NFTS as **leading a department of production or fulfilling a key creative role** and can generally be grouped into senior roles in these 12 key categories. Roles outside this including junior positions in these categories are considered “non-key” roles.

Key Roles

Creator/Showrunner

Director

Writer

Producer/Executive

Producer

Composer

Cinematographer

Editor

Production Designer/
Art Director

Sound Editor/Designer

Production Sound Mixer/
Re-recording Mixer

VFX Producer/Supervisor

Concept Artist

A NUMBER OF TERMS ARE USED THROUGHOUT THIS REPORT WHICH ARE DEFINED BELOW:

Definitions

Feature Film	<ul style="list-style-type: none"> • “Feature films” are made for cinema release, rather than a film made for television, and usually at least 80 minutes of duration. • We have used UK production data from the BFI instead of data on final certification films throughout the document, as production data provides a more accurate and up-to-date view of the industry today. In contrast, final certification data categorizes a film and its production spend all to the year in which it completed and achieved certification. • A film is defined as a UK film/ UK-classified film if it is a domestic production or wholly/partly financed by a foreign studio but at least 10% of total production spend is located in the UK (e.g features UK cast, crew, locations, facilities and post-production). Spend data is based on UK-only production spend.
High-end TV	<ul style="list-style-type: none"> • Television programming for which the production budget is more than £1m per television hour. • We have used UK production data from the BFI that was provided to the NFTS. • Defined as UK HETV if 10% of total production spend located in the UK. Spend data is based on UK-only production spend.
Domestic Production	<ul style="list-style-type: none"> • Feature film, HETV programme or television animation programme made by a UK production company that is produced wholly or partly in the UK.
Inward Investment Production	<ul style="list-style-type: none"> • Feature film, HETV programme or television animation programme which is substantially financed and controlled from outside the UK, where the production is attracted to the UK because of script requirements, the UK’s infrastructure or UK tax reliefs. Many (but not all) inward productions are UK films, HETV programmes or animation programmes by virtue of their UK cultural content and the fact that they pass the cultural test administered by the BFI Certification Unit on behalf of the Secretary of State for Culture, Media and Sport.
Screen Sector	<ul style="list-style-type: none"> • The UK economy defines film, HETV, animation, video games and children’s TV as the five sectors within the screen industry that can apply for “screen sector” tax reliefs.
FTE	<ul style="list-style-type: none"> • Full-time Equivalent.
GVA	<ul style="list-style-type: none"> • Gross Value Added. • Compound Annual Growth Rate.
Creative Industries	<ul style="list-style-type: none"> • Industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property. • They include the following sub-sectors: Advertising and Marketing; Architecture; Crafts; Design and Designer Fashion; Film; TV; Video; Radio and Photography; IT; Software and Computer Services; Publishing; Museums; Galleries and Libraries and Music, Performing and Visual arts.

The NFTS is immensely grateful to the individuals, trusts, foundations and companies who support our work.

Many have supported the School for the majority of its existence. The NFTS is a registered charity (no 313429) and receives around 32% statutory funding. In order to fund the remainder of its core activities and scholarships, it depends on voluntary income.

Thank you for your continued support:

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Department for
Digital, Culture,
Media & Sport



Other significant project funders:

Scottish Government

Buckinghamshire and Thames Valley Local Enterprise Partnership

Creative Europe

Google

Netflix

UK Research and Innovation



“The NFTS provides the crucial skills we need to keep our vibrant screen industry afloat, but what truly sets it apart is its understanding of the value of talent, its recognition of the importance of storytelling and its commitment to the promise of a new idea.”

Lord David Puttnam
(Oscar-winning Producer and President of the National Film and Television School)

*Krysty Wilson-Cairns on the set of **Last Night in Soho**, which she co-wrote with Edgar Wright.*

Photography by Parisa Taghizadeh

Our credits tell the story.

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or the NFTS please contact:

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