

**North East Screen Industries  
Development Programme  
Economic Impact: 2022 - 2026**

A summary of independent analysis by Saffery and  
Nordicity

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## 1. Executive Summary

The NESIP North East Screen Industries Development Programme has delivered significant, meaningful and measurable economic benefits for the North East during its first four years. Independent analysis prepared by Saffery and Nordicity shows that during the four-year period 1,419 full time equivalent jobs have been created and £88.5m has been generated in gross value added (GVA) for the North East economy.

Saffery and Nordicity conclude *“Summing the unduplicated economic impacts, we find that the NESIP has generated a total of 1,419.4 FTEs of employment and £88.5 million in GVA for the North East economy, during its first four years of operation.”*

Over the full five year programme the impact is forecasted to create 1,868 full time equivalent jobs and £114.7m in GVA.

Saffery and Nordicity state *“In many respects, the NESIP is on track to meet or even exceed most its five-year output targets. If the NESIP does meet its five-year output targets, then Saffery projects that it will generate an estimated 1,867.9 FTEs of employment and £114.7 million in GVA for the North East economy, across the five years of operation.”*

## 2. Background

NESIP is the programme established to support the development of the screen industries in the North East of England. The programme brings together five connected areas of intervention:

1. North East Screen launching, operating and marketing a dynamic, fit-for-purpose, impactful regional screen office, capable of driving and responding to sector growth and raising the profile of the region.
2. A North East production service that encourages production companies to the region and helps grow indigenous businesses delivering inward investment, increased production spend and regional employment.
3. The North East Production Fund (NEPF) that works with the sector to boost production through growing the number, quality and diversity of film and TV productions in the region.
4. Delivering a comprehensive skills and education service tailored to the screen industry sector – from entry and early career to established professionals.
5. A screen industry business development service to drive capacity, scale, resilience and infrastructure required to enable indigenous production and supply chain companies to meet current opportunities and build a solid foundation for future markets.

These interventions have been designed to work together. Production investment creates work for crew and suppliers; skills activity helps



local people access and progress through those opportunities; business support increases the capacity of regional companies; and the film office makes the North East easier and more attractive for producers to work in. As Saffery explains *“Crews, production projects, production companies and other business may access more than one programme delivered through the NESIP. Therefore, in preparing the economic impact analysis, Saffery has given specific consideration to avoiding the double-counting of economic impacts.”*

### 3. Overall Economic Impact

The economic impact identifies substantial growth during the first four years of the NESIP programme as shown in the following table:

Measure	Years 1 – 4	Five-year Forecast
Total employment impact	1,419.4 FTEs	1,867.9 FTEs
Direct employment impact	927.8 FTEs	1,261.0 FTEs
Total GVA	£88.5m	£114.7m
Direct GVA	£57.3m	£76.5m

Saffery and Nordicity commented *“This total economic impact included 928 FTEs of employment and £57 million in GVA generated directly within the film and TV production industry in the North East. The vast majority of this impact is linked to the production spend stimulated by the BBC MOU, followed by the NEPF and production-attraction services. This is followed by the business, income and operations impacts.”*

NESIP’s economic impact has contributed to significant growth in employment in the screen sector in the North East. This has created a wider contribution to the regional economy with the screen sector being the fastest growing employment sector. Saffery state *“Direct employment in the film and TV production industry in the North East grew by an estimated 69% between 2022 and 2024. With this rate of growth, film and TV production was the fastest growing sector of the North East’s economy”*

## Performance Vs Original Expectations

NESIP's original five-year programme expected to deliver 1,000 FTEs and £88m in GVA. By the end of year four the programme had already exceeded these targets by delivering 142% of the original employment target and 101% of the original GVA target. The five-year forecast represents 187% of the original employment target and 130% of the original GVA target.

These results demonstrate that the programme is delivering significantly above expectations and impact has increased throughout the programme.

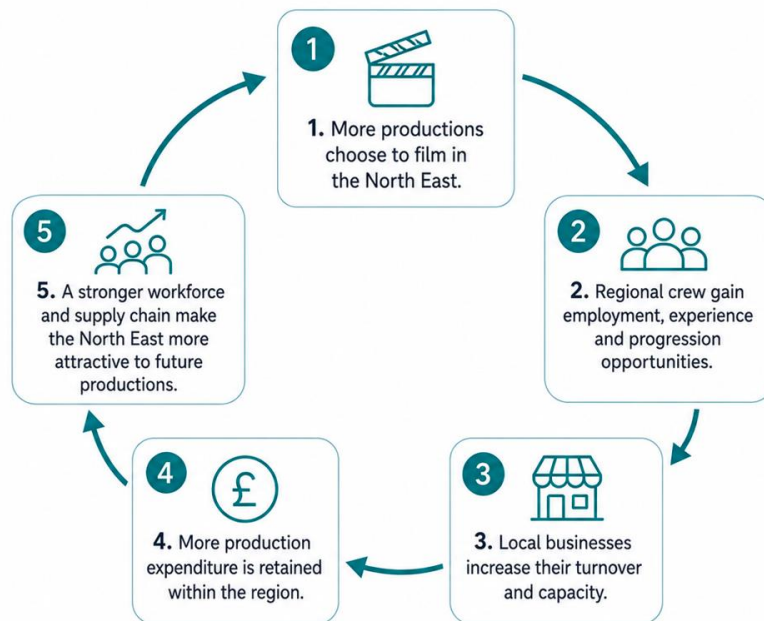
## 4. Continued Growth and Momentum

The year 4 figures show that the economic impact of NESIP is continuing to increase. Between years 3 and 4 the programme added 372.7 FTEs and £23.5m in GVA. This growth in impact reflects that the screen industry in the North East is maturing as more productions film in the region, a larger and more experienced crew base is available, broadcaster and industry relationships are improving and the NEPF is creating a stronger production pipeline.

The year 5 forecasted figures do not take into account the most recent memorandum of understanding between the BBC and NESIP which was agreed in March 2026 and takes us into 2027 and the next stage of development. Therefore there is potential for the programme to exceed the year 5 projections as Saffery and Nordicity conclude *“However, this forecast does not include any further investment via the BBC MOU, so it is likely that the impact at the end of the fifth year will exceed these figures.”*. The final programme impact could therefore be higher than the projections in section 3.

NESIP has also created the conditions required for longer-term growth in the North Easts screen sector. The creation of a stronger regional workforce incoming and indigenous productions can recruit more roles locally. A larger and more capable supply chain means that a larger proportion of production spend remains within the North East. Successful productions and strong broadcaster relationships

strengthen the region and help to attract further activity. These conditions create a cycle:



## 6. About the Analysis

The economic analysis was independently prepared by Saffery and Nordicity. The report estimates direct, indirect and induced employment and GVA generated through NESIP's activities.

Saffery is a UK firm of chartered accountants and business advisers with longstanding specialist expertise in the screen industries. Its dedicated Film, TV & Video Games team has provided specialist advice to film and television companies for more than two decades, working with production companies, broadcasters, studios, financiers, distributors and post-production businesses. Saffery was commissioned to undertake the independent economic impact assessment of NESIP, working alongside screen-sector research and consultancy specialists Nordicity.

The report safeguards against overlap as the full report explains *“Crews, production projects, production companies and other business may access more than one programme delivered through the NESIP. Therefore, in preparing the economic impact analysis, Saffery has given specific consideration to avoiding the double-counting of economic impacts.”*

Employment impacts are represented as full-time equivalents. FTEs represent the volume of employment supported.