An Invisible Army

The Role of Freelance Labour in Bristol's Film and Television Industries

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Acknowledgements

Report Design Jim Smith Design Ltd (www.jimsmithdesign.co.uk)

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The Research

This report is based on a one-year research project (January 2018–19) funded by the Arts and Humanities Research Council (AHRC) through the National Productivity Investment Fund. The research was conducted by a research fellow employed by the University of the West of England Bristol and undertaken in partnership with the Royal Television Society Bristol, Creative England, Creative Skillset, and Bristol Media.

Figure 1 Area covered by the West of England Local Enterprise Partnership Zone

Aims and Objectives

The purpose of this report is to complement current statistical data on freelance labour by providing a detailed, qualitative portrait of how freelancers negotiate precarious careers within specific regional contexts. The research arises from and develops a 2017 report, *Go West! Bristol's Film and Television Industries,* which concentrated on companies, but did not examine freelance labour in detail. Because this is a complementary study it uses the same understanding of the Bristol region as defined by the West of England Local Enterprise Partnership zone (see Figure 1).

Research Design

In order to gain an insight into the working lives of freelancers, twenty semi-structured interviews were conducted with freelancers from a variety of occupational groups within Bristol's film and television industries. This research contributes to a larger body of literature about the conditions of precarious labour within the creative industries.[1] This report also draws on quantitative data gathered through the *Go West!* survey to provide an understanding of diversity within the sector and analyse the complexities of freelancers' working lives in the creative economy. In doing so, it complements the large-scale national surveys concerning the UK's creative workforce undertaken by organisations such as Creative Skillset, the Producer's Alliance for Cinema and Television (PACT) and the British Film Institute (BFI) by providing statistical analysis that is located within a specific regional context.

Key Findings

1. As an occupational group characterised by their responsiveness, resilience and innovation, freelancers make a vital contribution to the UK's creative economy. Although there has been a general acknowledgement of their importance, existing studies often remove freelancers from the localities in which they work. This report demonstrates that, rather than being 'placeless' nomads, freelancers are both place-makers and key contributors to the creative economies of cities. As such, freelancers make a vital contribution to Bristol's creative economy as an informal economy of both competition and collaboration, in which building networks, sharing resources and exchanging knowledge is the foundation.

2. Without a legally defined status for freelance work, beyond often equally irregular tax classifications, individuals are experiencing the effect of precarious working conditions regardless of actual income or the regularity of their employment. The lack of clear definition or recognition for the inherently ambiguous nature of freelance work can have a negative impact on the financial profile of individuals, making it difficult to secure mortgages or other personal financial lending due to the fluctuating nature of their work.

3. The 'pull' of London is often a strong theme in studies about the mobility of labour within the film and television industries. But often absent in such analyses are the push factors that are driving freelancers out of the capital. Reduced quality of life, high cost of living and poor work/life balance were recurring themes within the interviews, alongside the highly competitive and 'cut throat' nature of working in London. Increasingly, Bristol, and other regional creative clusters, constitute strong magnets for attracting high quality creative talent and help to 'rebalance' the UK economy making it less London-centric.

4. With a decline in apprenticeships, freelancers are now increasingly paying to train, rather than being paid to train. The sector would benefit from an increase in local and affordable training schemes to meet the needs of Bristol's freelance community. This might go some way to address the barriers that freelancers currently experience when trying to access training, while also enhancing the career prospects for those from less privileged socio-economic backgrounds.

5. With many freelancers asserting the importance of co-working for combatting isolation and improving mental health, the rising cost of office and working space within the city arguably has a significant impact on the health and wellbeing of freelancers. Bristol City Council and other agencies should seek to provide affordable office spaces. Alongside encouraging freelancers to work in the city, the provision of accessible co-working spaces would contribute to addressing issues of isolation and wellbeing within the freelance community.

6. Although online communities and networks are facilitating new forms of collective bargaining and strengthening worker solidarity across disparate employers and geographical spaces, the role of unions in protecting employment rights has arguably never been more important in safeguarding the rights of the UK's fast-growing freelance workforce. But to remain relevant to freelancers, unions need to protect and represent the rights and position of freelancers in the external labour market, rather than concentrate exclusively on relationships with single employers.

7. The formation of a possible 'Western Powerhouse' and ambitions to increase collaboration and mobility between Bristol and Cardiff will not be a straightforward process. The inherent mobility of freelance labour offers a potential catalyst for this to become a reality. Yet, at the same time, there are a number of historical constraints and barriers that continue to inhibit freelance work across the two cities that require further understanding and investigation.

8. Concerns were expressed about the effect of Brexit, both on the ability of UK freelancers to work in other European countries and of attracting and retaining international talent in Bristol. There is strong statistical evidence that Britain's departure from the EU may have a negative impact the UK's creative economy – including Bristol – if funding from organisations such as Creative Europe became inaccessible.

Recommendations

1 Freelancers need to have defined legal status with certain employer expectations. This is a pressing issue because the lack of formal definition hinders the ability of freelancers – across all occupations – to access mortgages and other forms of financial and thus contribute to the local and national economy as well as providing greater stability and security in their working lives.

2 The perception of freelancers is that trades unions need to do more to protect and represent the rights and position of freelancers in the external labour market, rather than, as appears to be the case, being confined solely to negotiating relationships with single employers. Freelancers consider that they need to be better informed about access to sick pay, maternity cover, pensions, mortgages and other personal lending, alongside providing training and hosting networking events with the aim of enhancing employability.

3 Freelancers would benefit from an increase in affordable training schemes both regionally and nationally. Such provision might go some way to trying to address the barriers that they currently experience when trying to access training, while also enhancing the career prospects for those from less privileged socio-economic backgrounds.

4 Universities need to respond to shifting work practices by providing curricula in which entrepreneurialism is taught explicitly. They should train and educate students in how to cope with being self-employed and how to find and secure work as a freelancer.

5 Bristol City Council and the West of England Combined Authority (WECA) should seek to provide affordable office spaces. Alongside encouraging freelancers to work in the city, the provision of accessible co-working spaces would help to address the isolation and wellbeing issues experienced by many freelancers.

6 This local study reveals the need for up-to-date statistical information about the size and scale of the freelance workforce within the film and television industries. Organisations such as Ofcom, Creative England and the BFI should endeavour to provide regionally based statistics in as well as national studies to highlight any regional disparities. Ofcom should require broadcasters to monitor and publish the percentage of local crew employed on productions.

7 Freelancers would also benefit from a dedicated South West crew database encompassing Bristol, Newport and Cardiff to alert UK-based and international production companies shooting in the region to recognise the wealth of local talent that is available.

Introduction

The Creative Industries are becoming an increasingly significant component of the UK economy. In 2016 the DCMS reported that this sector was worth £84.1 billion per year and grew at almost twice the rate of the wider UK economy, generating almost £10 million per hour.[2]

Although freelancers are central to the creative industries, their contribution to the creative economy is statistically invisible and poorly recognised. According to Creative Skillset, in 2015 89% of all workers in the film production sector and 52% of those working in independent television production in the UK were freelance.[3] Freelancers constitute an occupational group of highly skilled, responsive, resilient and creative individuals, and form a significant component driving innovation and creativity that are crucial to the creative industries. They contribute to both local and national creative economies through their responsiveness to new ideas, and freedom from contract-based habits and ossified practices. But while, in some respects, freelancers are characterised as nodes of creativity who exist outside the formal habits and frameworks of employment, they suffer from significant constraints that impede their ability to contribute to innovative and creative practices. This report seeks to analyse and address their contribution to the creative economy, specifically the film and television industries in Bristol, and how that contribution might be better recognized, valued, supported and enhanced.

**Figure 2** Shaun the Sheep
© Aardman Animations

Freelance workforce models have also proliferated beyond the creative industries in recent years. Over two decades ago Josephine Langham suggested that the film industry 'is part of the vanguard of future employment practices and is therefore an advanced form of a general employment model'.[4] Indeed, over the past decade the UK has undergone a broader societal shift towards a so-called 'gig economy', which has left numerous sectors becoming increasingly characterised by precarious work and diminishing employment rights. 1.77 million people in the UK are employed principally as freelancers and the number of freelance workers increased by 43% between 2008 and 2016.[5] Artistic, literary and media occupations were the second fastest growing sectors in terms of freelance labour, increasing by 103% during the same time period.[6] These profound shifts in employment practices make freelance labour an important topic for investigation and analysis.

In contradistinction to existing studies which take a national perspective, this study focuses on a regional creative economy: Bristol's film and television industries. Bristol is the UK's third largest cluster of film and television workers after London and Manchester, with an estimated 1,500 freelancers working in the region.[7] Within a production economy composed of BBC Bristol and around 150 private companies, Bristol is perhaps most notably home to multi-award winning Aardman Animations, the BBC's world-renowned Natural History Unit, which has produced groundbreaking programmes for over half a century, and the largest dedicated film and TV studio facility in the West of England, The Bottle Yard Studios. In 2017/18 Bristol's film and television industry generated £15.2m in inward investment across 1,141 filming days and 383 productions.

With the increased devolution of television production to the UK's nations and regions it is now imperative to investigate the role of freelance labour within regional cultural clusters as an important element in understanding their contribution to the broader UK creative economy. Since 2008, the BBC has increased its out of London programme spend with the establishment of regional 'centres of excellence' in Glasgow, Belfast, Cardiff, Salford, Greater Manchester, Bristol, and Birmingham as well as London. In particular, the opening of Salford's MediaCityUK in 2011 represented a watershed moment in regional production.[8] The devolved governments of Wales, Scotland and Northern Ireland have also increased their investment in local production, with the establishment of a £30m Media Investment Budget in Wales, a £1.7m Production Growth Fund in Scotland and £5.1m of Government investment in Northern Ireland. Television production is primarily driven by the public service broadcasters, which spent an estimated £1.1bn in 2017 on network and regional programme commissions made outside the M25, delivering 6,453 hours of new network content. This accounted for almost half (49%) of all the PSBs' total qualifying network hours.[9]

This report is the first to investigate the importance of freelancers to the economy of a regional creative cluster. It builds on and extends Andrew Spicer and Steve Presence's 2017 *Go West!* report on Bristol's film and television industries, by providing an in-depth, qualitative analysis of the working lives, aspirations and challenges faced by freelancers living and working in Bristol.

Full-time fixed term **26** (15.1%)

Part-time fixed term **6** (3.5%)

Multiple employers/clients (Schedule D Tax Status) **55** (32%)

Running your own company, including sole trader **59** (34.3%)

Unemployed **12** (7%)

Volunteer/intern **2** (1.2%)

Other **12** (7%)
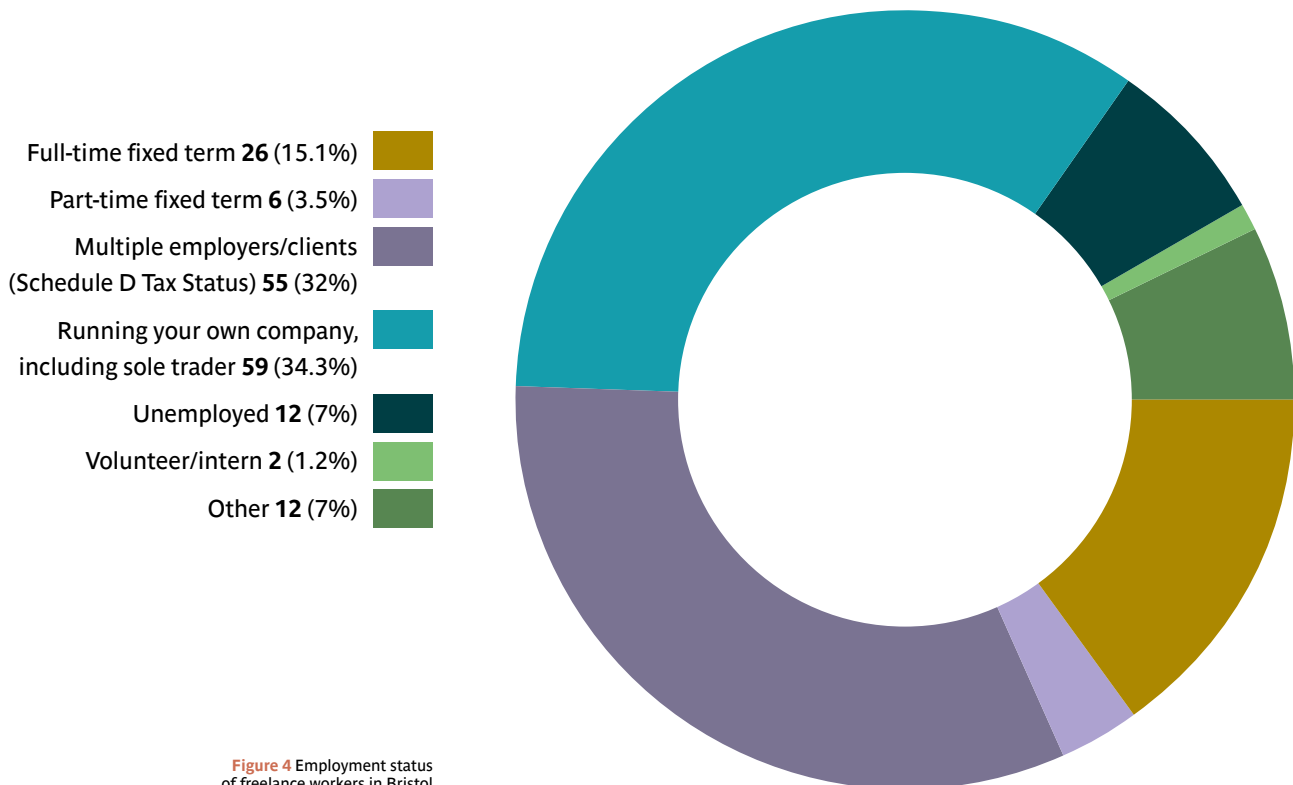
Figure 4 Employment status of freelance workers in Bristol

Animation **9** (3.5%)

Archiving **1** (0.4%)

Art & Design **15** (5.9%)

Audio/Sound/Music **14** (5.5%)

Camera/Photography **28** (11%)

Creative/Content Development **13** (5.1%)

Commercials **6** (2.4%)

Corporate Production **11** (4.3%)

Costume/Wardrobe **10** (3.9%)

Distribution, Sales and Marketing **0**

Editing **39** (15.3%)
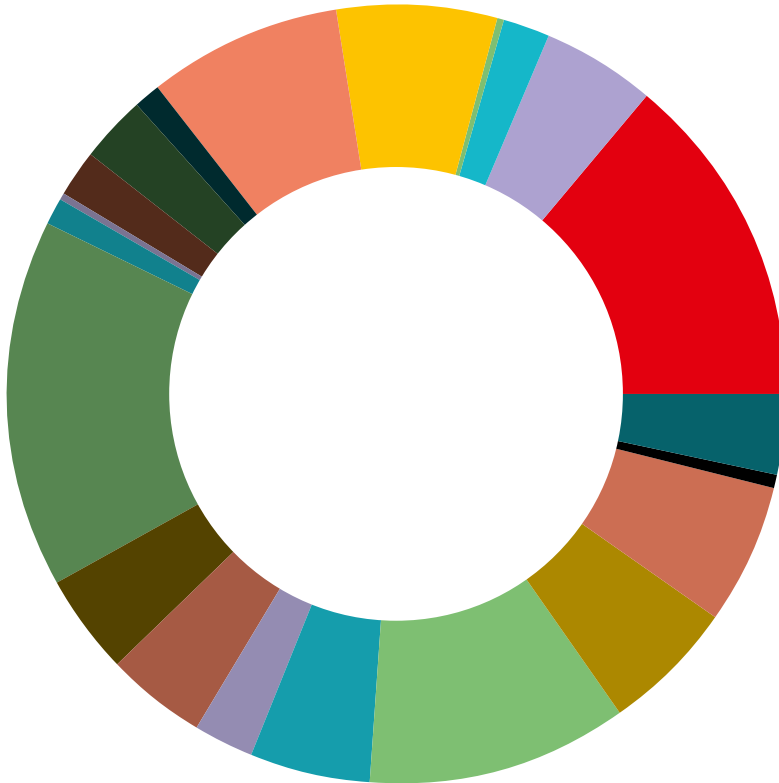
Education & Community Engagement **3** (1.2%)

Facilities Skilled Staff **1** (0.4%)

Facilities/Studio Operations Management **5** (2%)

Lighting **7** (2.7%)

Make-Up & Hair Dressing **3** (1.2%)

Producer **20** (7.8%)

Production Management **17** (6.7%)

Transport **1** (0.4%)

VFX **5** (2%)

Writing **12** (4.7%)

Other **35** (13.7%)

Main Report

Defining freelance labour

Freelancers are often characterised as the film and television industry's 'invisible army'. This is in part due to the transient nature of their work and careers: it is hard to track and map freelancers because, by nature, they are highly mobile across different employers and also across different geographical areas and cities. A representative study asserted: 'freelancers can be seen to have a *role* but not a *place*.'[10] Alongside the skill-specific roles individual freelancers occupy, the freelance workforce fulfils an important economic role by responding to opportunities in the market as they occur. In this sense, freelancers constitute a 'reserve army'[11] of cultural workers, allowing employers to offload the financial risks and precarity of creative work onto the workforce itself. As individual freelancers move between employers to meet the demands of the market, their connections to particular places becomes harder to discern from quantitative data and statistics alone. However, as this report evidences, freelance work is strongly situated in place and locality and makes a vital contribution to the strength and sustainability of regional production. As such, defining the nature of freelance work also requires understanding the local cultural, political and economic contexts in which it takes place.

Figure 6 Flying Blind, Ignition Films © Nick Wall
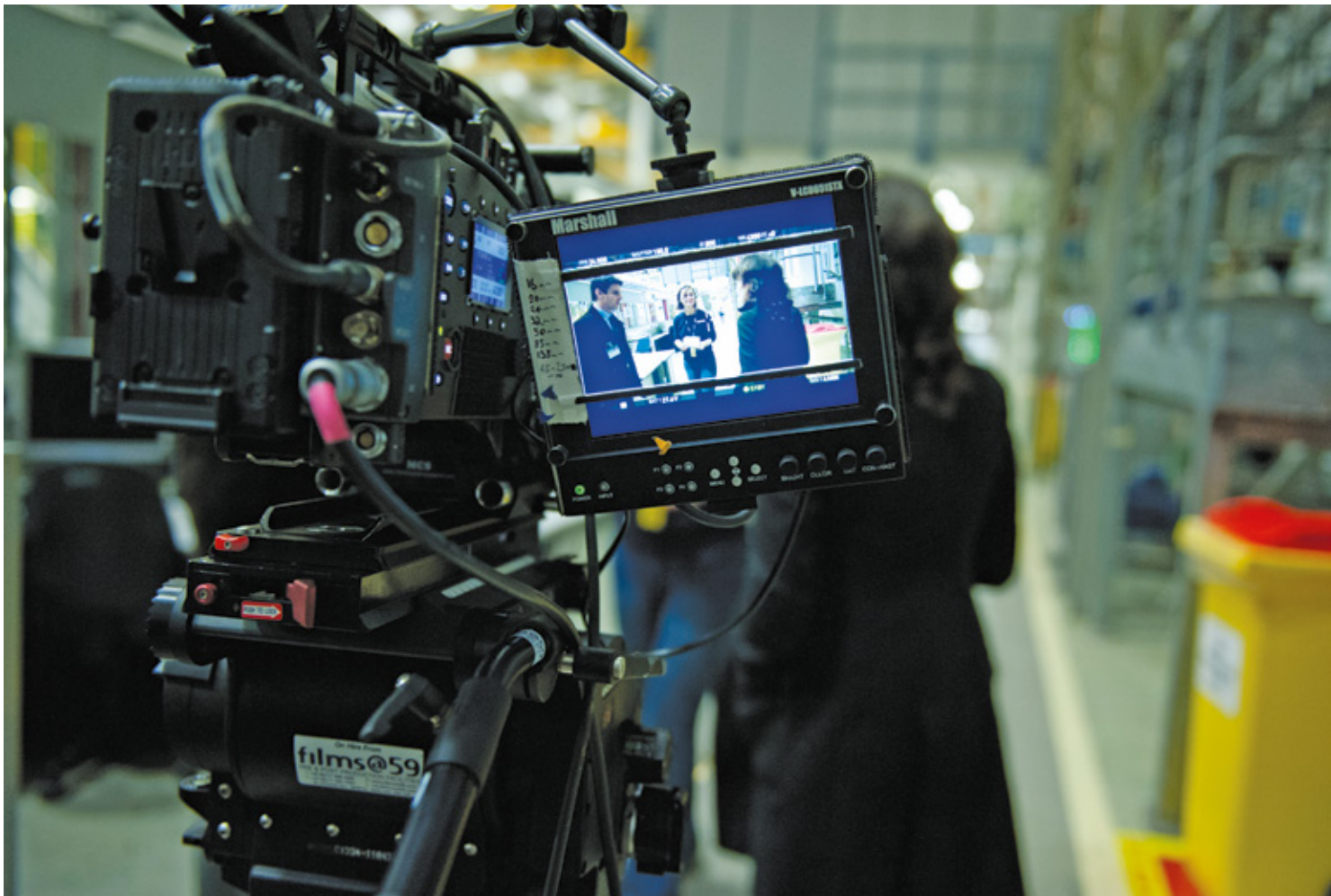
Despite the increased prominence and importance of freelance workforce models, freelancers also remain relatively invisible within UK policy and legislation. At present there is no official, legal or commonly accepted definition of freelancers that exists in the UK. The ambiguity of the term is most evident when examining HMRC (Her Majesty's Revenue and Customs) tax guidelines used to determine tax status. The HMRC's 2012 'Film, Television and Production Industry Guidance Notes' states that individuals are considered 'self-employed' and therefore excluded from PAYE (Pay As You Earn) tax deductions in the film and television production industries if they operate within the HMRC's list of 'accepted self-employed grades' and provided that they fulfil any specific requirements set out in the document. For example, a 'Digital Set Designer' would only be considered self-employed if her work is 'performed other than on premises provided by the engager'. Individuals may also be exempt from PAYE if they are employed for a period of six consecutive days or less (known as the 'Seven-Day Rule'), or if they have been issued with a 'Letter of Authority' by the HMRC stating that they 'have satisfactorily demonstrated that their overall pattern of activity amounts to self-employment'.

However, a number of interviewees still self-identified as freelance, despite being classed as employees and falling under the HMRC's PAYE tax system.

> I'm a freelancer but I'm not self-employed. People don't see the difference. They don't realise there's a difference. You're self-employed if you're a sole trader or if you're a limited company. I'm neither. I am PAYE. I get paid and I pay tax as I earn so actually what happens is I go on the payroll for every single production company that I work for. I am banks' and people's worst enemy because I look like I never stick with a job, because I'm a contract worker. (Production Manager)

In this regard, freelance work is not a legal concept, but rather the term is one sanctioned by a custom and use by workers and employers to characterise certain types of contracts and work within particular settings. Conventionally, freelancers are understood as skilled professional workers who are neither employers nor employees and supply labour on a temporary basis for a range of clients. However, as shown by the interviewee above, the lack of clear definition or recognition for the inherently ambiguous nature of freelance work can have a negative impact on the financial profile of individuals. Several freelancers also asserted that it was difficult to secure mortgages or other personal financial lending due to the fluctuating nature of their work.

> I haven't bought anywhere yet, but I know that when I do it's going to be really difficult. Three years ago I moved into a flat by myself and my dad had to be guarantor, even though I earnt enough to pay for the flat. Even things like the electricity company I was going with said, you have to put down a £400 deposit for a year and then we'll give it back as long as you pay your bills on time. So even though I could say, well this is how much I've earnt last year, they were like, yeah but your job finishes in two weeks. It's very difficult. Things aren't set up for freelancers and you're constantly encountering problems. If people want to know what's your annual income you're like, well it depends! And then they think, oh my god, do you earn that every week, across 52 weeks of the year. Is this how much you earn? You say, no. I'm lucky to work two-thirds of the year. The financial world is not set up for freelancers and more and more people are freelance now so it really should be more adaptable. (2nd Assistant Director)

Future financial precarity was also a concern, with a number of the freelancers interviewed stating that they were not currently paying into any form of pension scheme.

> I haven't got a pension yet. That's probably going to become a challenge later on, but yes, I'm not thinking about it yet. (Editor)

> You do waive all of your rights to pension, sick pay and all of those things and, as freelance grows, we lose all of those rights that were hard won by unions over the last 100 years. They're slowly I think being diminished. (Editor)

A 2018 report by Demos shows that, across the board, only 17% of self-employed workers – and just 13% of self-employed women – participate in a pension scheme, compared to over 50% for employees generally. 46% of self-employed workers are 'seriously concerned' with their current pension provision.[12] While positive progress has been made by the UK Government toward new pension schemes such as the introduction of The National Employment Savings Trust (NEST) and Single State Pension, the varying types of employment contract and financial precarity that characterise freelance work still present significant challenges to pension schemes modelled on more standardised employee workforce models.

Although freelance workforce models have proliferated across numerous sectors over the past decade, the gap between these increasingly conventional employment practices and legislation remains apparent. Without any formal framework for recognising the employment status of freelancers, beyond often equally irregular tax classifications, individuals are experiencing the effect of precarious working conditions regardless of actual income or the regularity of their employment.

Precarious work

The precarious nature of the creative industries is well documented. Film and TV workers have been described as 'the poster children of precarity'.[13] When interviewees were asked to identify the biggest challenge they face as a freelancer, almost all of the participants discussed the issue of finding regular work and trying to sustain a career on varying short-term contracts and extended periods out of work:

> Hands down, the biggest challenge that a freelancer faces is just getting enough work. Before I made the switch to editing, I was a freelance assistant producer and I was really struggling. I would get a job for two weeks or four weeks and then nothing for four months. I had to move back to Hampshire and live with my dad and it was so bleak. I've never forgotten those days. (Editor)

19% of freelancers who responded to the 2017 *Go West!* survey had been employed for four months or less over the previous year; 30% reported undertaking non-audio-visual work during the same period such as administrative or customer service roles.


Figure 7 The concerns of freelancer workers

- Anti-social shift patterns **56** (19.4%)
- Insufficient break times **59** (20.4%)
- Long working hours **105** (36.3%)
- Mental health issues **29** (10%)
- Too much night-time working **17** (5.9%)
- Other **23** (8%)
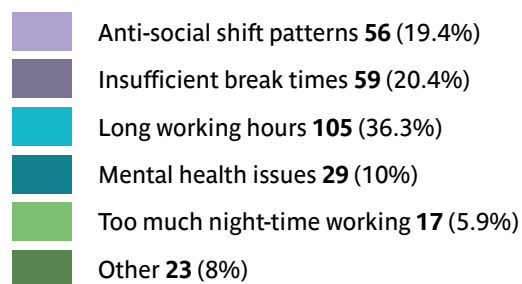
A number of freelancers also reported being reluctant to go on holiday or take time off, particularly during the early stages of their career, as they were afraid to miss out on any potential work.

> Let's say you work for three months and you've made lots of money, and then you haven't got any work lined up. You know, you'd say, "Well, I've worked a lot. I'm going to take some time off and enjoy myself, or work on a side project." But a lot of the time I just stress, and think, "Oh, I shouldn't really be spending money because I don't know what else is coming up." I think, I've learnt to, sort of, control that a bit more and make the most of my free time, but it's still a bit of a challenge. For example, if I'm booking a holiday. I'm like, "What if work comes in then, and it's the best project ever?" (Editor)

Many of the freelancers interviewed also described how the precarious nature of their work has an adverse effect on their mental health.

> That's the one thing about freelance, I have found it very traumatic at times, you know, and I become really insecure about my own abilities and that kind of thing. You feel, if the phone doesn't ring and you have nothing, you've finished a job and if there's nothing in the pipeline you just think, my god is this it? I have found that really, really tough over years. My wife always says, you've been doing this for 18 years or whatever it is and you've never come unstuck yet, so why do you think you're going to now? Which is reassuring to know but that can be scary, just that insecurity. I've found that has been a real challenge. When I retire, if I look back on my working life, I'll think I spent a lot of time really unhappy about that, which is a shame. (Editor)

The findings of the present study are also in line with a major study, *Creative Labour*, in which many of the creative professionals interviewed 'spoke of nervousness, anxiety and even panic as a regular part of their working lives'.[14] Their research also supports the findings of a 2018 report by the Communication and Media Research Institute at the University of Westminster (CAMRI) into wellbeing and mental health in the 'gig economy', which found 'cripplingly high levels of self-reported depression (68.5%) and anxiety (71%) amongst music makers'.[15]

Income insecurity is a particular challenge in relation to the high cost of living in Bristol. House prices in Bristol are now rising faster than London, up 4.6% year on year while in London prices are only rising by 0.4%.[16] A 2018 report by the Lloyds Bank Affordable Cities Review also found that Bristol was one of the least affordable places to live in the UK, with house prices almost nine times higher than the average wage.[17] Anecdotal evidence from freelancers would suggest that the price of renting shared office space has also risen. One interviewee described how he and a group of other freelancers had to move out of a shared office space after the rent nearly tripled between 2016 and 2018. With many freelancers asserting the importance of co-working for combatting isolation and improving mental health, the rising cost of office space within the city arguably has a significant impact on health and wellbeing within the freelance workforce.

Figure 8 Freelancers' location of work places

- Co-working space **9** (5.6%)
- Educational institution **2** (1.3%)
- Employer's studio **50** (31.3%)
- Home **30** (18.8%)
- Library **0**
- Museum/gallery **0**
- Office **14** (8.8%)
- Own studio **5** (3.1%)
- Public space (such as cafés or bars) **4** (2.5%)
- Other **46** (28.7%)
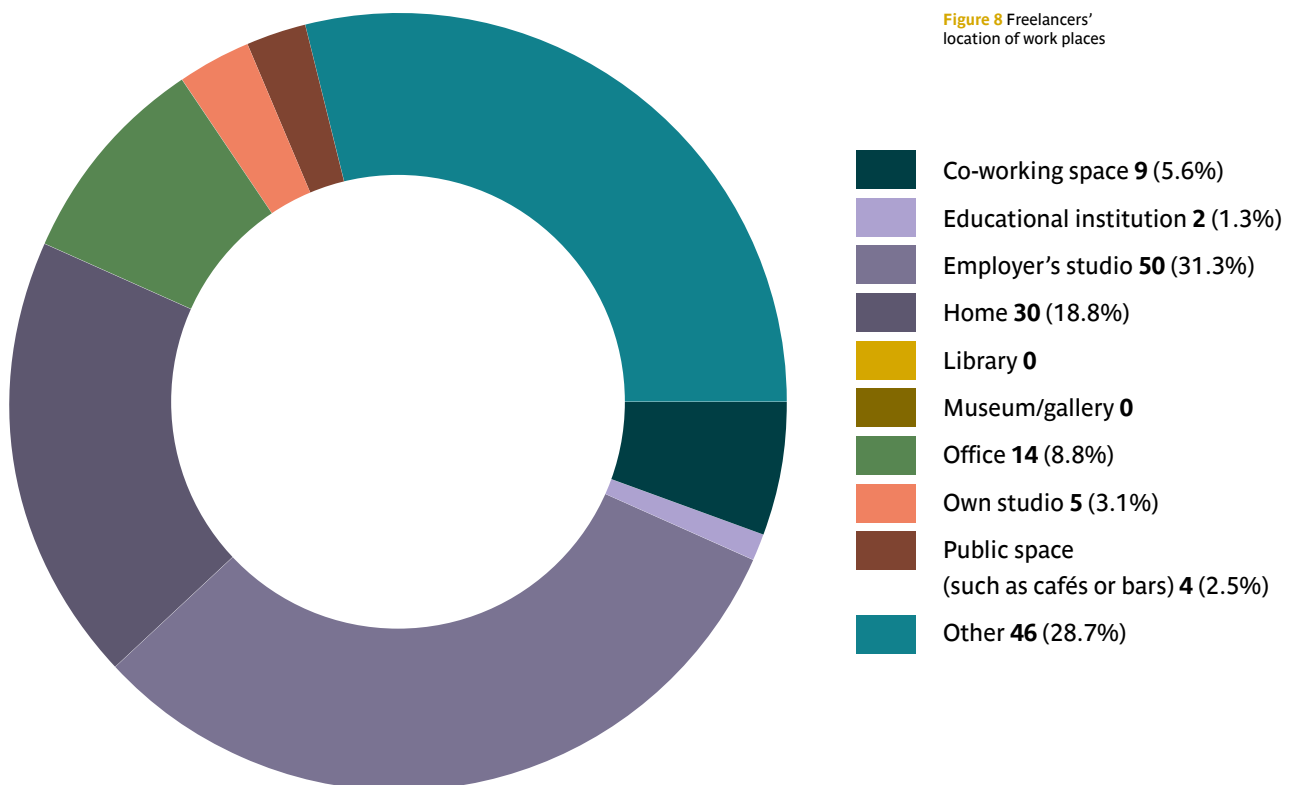
Unpaid work and exploitation

The inherently precarious and competitive nature of the film and television industries has left freelancers working within this sector particularly vulnerable to exploitation. The romanticised discourses around film and television work as creatively autonomous, fulfilling and 'glamorous' has led to the acceptance of a 'labour of love' narrative, in which creative workers are not perceived as engaged in 'work' at all, but are rather motivated by their passions or creative drive: 'Many cultural workers are so self-motivated that they "set themselves" to work, working excessively long hours for little pay, embracing uncertainty and risk in order to pursue careers in culture.'[18] Unpaid work within the creative industries has propagated within this context. Almost three quarters (74%) of respondents to the *Go West!* survey reported undertaking unpaid work at some point in their career. A 2016 report by the Association of Independent Professionals and the Self-Employed (IPSE) found that freelancers working in the sector lose an estimated £5,394 a year through working for free. 86% of freelancers had worked for free between 2014 and 2016; 67% of those were women. It could be argued that these gender discrepancies in terms of unpaid work is another iteration of a wider gender pay gap within the film and television industries. A 2018 press release by Channel 4 identified a 22.7% pay gap between male and female employees.[19] A report by the BBC in the same year highlighted a 7.6% median gender pay gap within the corporation.[20] Within this context, the IPSE statistics suggest a pertinent need to acknowledge and measure forms of pay inequality that exist outside of standard employment structures.

Figure 9 Edit suite, Films@59 © Films@59
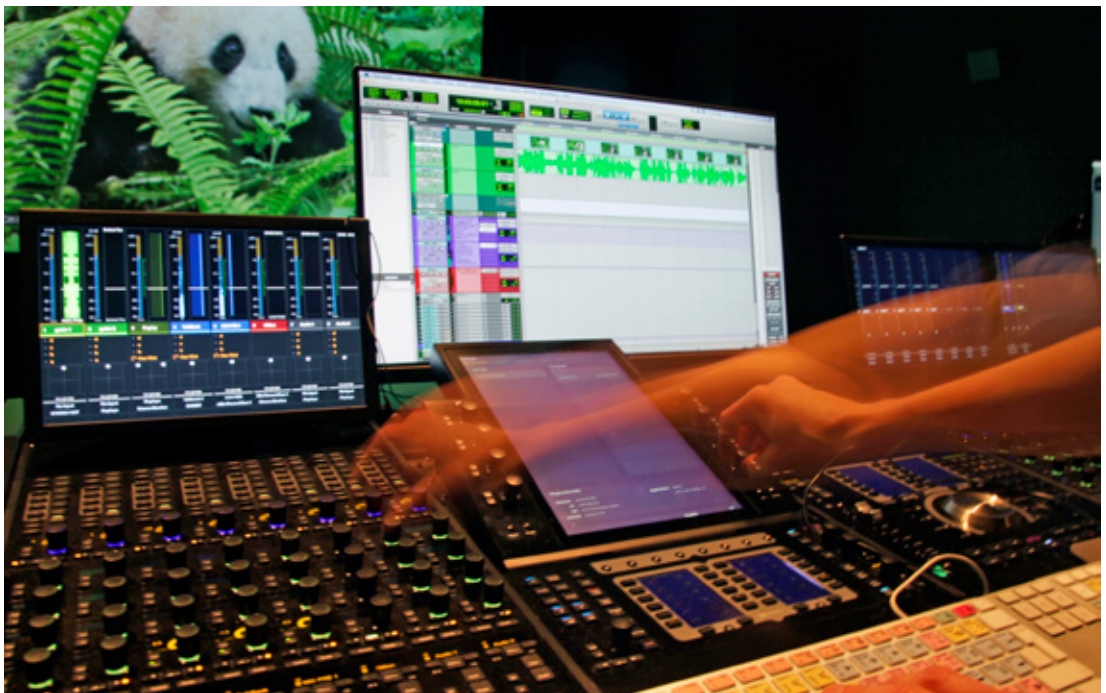
Despite these general findings, only a few of the freelancers interviewed for this study responded positively when asked if they had undertaken any unpaid work. Furthermore, those who had worked for free justified the unpaid labour time by stating they had worked for friends or charities.

> Yes, I did some unpaid work but it was all for charities, so I didn't actually do any unpaid work for any, sort of, production companies or anything. Yes, I actually don't agree with that, but also, I don't think anyone asked me to do it. So, yes, I did do a couple of jobs for charities. That was my way of networking as well. Some of that work led to paid work, so that was alright. (Editor)

As the quotation above highlights, unpaid work, while exploitative, is often regarded as a way to break into the film and television industries and begin building networks and contacts that will lead to paid employment.

Often absent from reports and statistics concerning the issue of unpaid work in the creative industries are the more covert forms of unpaid labour necessary to build and maintain a freelance career. Many of the freelancers interviewed discussed how, particularly in the early stages of their career, a significant amount of time and energy went into networking through informal events and meetings. Even those with established careers discussed needing to constantly ensure they were 'relevant', both in terms of skills and contacts within the industry.

> When you're not working, your full time job is to find work. You should never rest in the sense that, yes of course you have some time off, excellent. If I have a few months off or whatever then yes, I deserve to have a holiday, but I will never not be in touch with people, I will never not be proactive about finding work because it doesn't come to you naturally, especially at the start of your career. (Production Manager)

Although many of the freelancers interviewed reported that they had not undertaken any form of unpaid work at any stage of their careers, a greater proportion acknowledged that they had accepted fees that were disproportionally lower than the time required to complete the work.

> I've done very low paid, obscenely low paid work. When I first came to Bristol, I was skint and there was no work and I'd just do bits. I was like, "Yes, I'll do that for £50, whatever" just to do something vaguely art or animation related just to keep my hand in. Eventually that paid off. But free work, no. I've tried to make a point of not doing free … (Animator)

> I do low-budget stuff because I want to. That's usually just a flat rate they pay you, so it doesn't matter how many hours you put in, they just have a set amount of money. So technically I'm getting either paid very little money for that or putting in free hours but you get to pick and choose that sort of stuff. (Editor)

While undertaking low-paid work was justified as an individual choice, and one that would potentially be beneficial in the future in terms of building experience and connections, others raised concerns about the detrimental effect of this on the workforce as a whole in terms of devaluing their skills and time. Building on from this, the following section examines the role of trade unions in addressing exploitation and mobilising collective action within the freelance workforce.

Unionisation and collective action

Historically, trade unions have served an important role in protecting the rights of creative workers, particularly within institutions such as the BBC and ITV in which union membership was a pre-condition of employment until the late 1980s. Union membership among workers in the film and television industries has declined as workforce models have shifted from being mainly reliant on permanent contracted staff, toward an increasing emphasis on independent and freelance production.[21] With the launch of Channel 4 in 1982 as a publisher-broadcaster, rather than producer of programming, a new independent television sector in the UK emerged and with it came greater pressure on the BBC and ITV to increase commissioning independent productions.[22] In the ten years between 1987 and 1997 ITV shed 44% of its staff, while the BBC reduced its in-house workers by 33% in the same period, and the overall the percentage of freelance workers in the labour force rose from 39% to 60% during this time.[23] The establishment of BBC Studios in 2015 as a commercial production company will also cause a further increase in freelance labour in television as the BBC reduces its in-house production.

In 2017 the Broadcasting, Entertainment, Communications and Theatre Union (BECTU) had over 40,000 members, approximately 10,000 of which identified themselves as freelance (25%).[24] This has reduced from a reported 40% in 2004.[25] Although 41% of the freelancers surveyed for the *Go West!* stated that they were a member of a union or professional association, 39% of respondents reported that they did not have a formal contract for their most recent freelance job. These are concerning statistics given that, as previously discussed, freelancers are acutely vulnerable to exploitation in the form of low/unpaid labour and reduced employment rights in terms of sick pay and pensions.

A number of freelancers interviewed considered that unions were not relevant to them due to their freelance status because the main function of unions was to protect employees of companies.

> I can't see how a union would be able to support a freelancer in the same way as a union would look after an employee. Supposing for example I felt I was being bullied or someone was being sexist or whatever in the workplace, I can't see how as a freelancer I would get the support from a union in the same way as if I was a staff member at the BBC. (Editor)

This not only leaves freelancers vulnerable to exploitation, but also deprives them of an overarching formal framework to deal with the sort of issues this editor describes, such as bullying and sexism in whatever workplace they are in at the time.

Other interviewees, particularly those working in animation, asserted that they were unaware of any unions that were relevant to or cater for their particular profession.

> I worry about that union thing not existing quite a lot. I worry that there's nobody really fighting the animators' corner other than the animators themselves. A lot of animators seem to be so easy-going to the point of it's not working in their best interests. A lot of people are willing to forego certain employment rights and benefits because they are so keen to work in the industry. I've spent the last maybe eight or nine years, let's say, not putting up my day rate because I was terrified that if I did and I started asking for more, even by a little bit, that there'd be somebody else with a slightly lower day rate that that employer would then go to. There are tons of people out there ready to take a job that you don't or that you price yourself out of. It's a worry. (Animator)

This lack of awareness, or in some cases dismissal, of the role and relevance of unions may be a result of certain occupations such as animation primarily emerging outside the tradition of unionisation that developed through the 'closed shop' of in-house production within broadcasting.

As highlighted in the quotation above, unions also occupy an important role in setting rates and reducing opportunities for undercutting. BECTU provides rate cards for a number of occupations, which state the rates that have been recommended by the relevant BECTU branch to their members. However, maintaining these rates across the industry is primarily the result of the level of unionisation within particular occupations. As such, electricians express less concern around undercutting compared to those working in animation or post production for sound.

> An electrician has a set rate. It's written down in black and white that we've negotiated with the Producers Alliance and then there are different rates for the size of production. So, the gaffers, like me, and the best boys, which is the gaffer's assistant, have to negotiate their own rate, but it's never ever going to be lower than an electrician's rate. There is some undercutting, but not so much. I think, in my side of it, we're pretty united, we're pretty tight. (Gaffer)

The freelancers interviewed also discussed closed and 'secret' Facebook groups as spaces for building community, finding work, facilitating collective action and sharing knowledge. Membership of such groups is vetted to ensure that only those working within particular industries and within certain roles are allowed to observe and engage in the online discussions. The lack of visible connection to a formal union also creates a 'safe space' for those who are concerned about being blacklisted by their association with certain organisations or unions. For those professions that are less unionised, these online forums provide an important platform for sharing and comparing rates, 'naming and shaming' both employers and employees who either offer or accept lower rates than those deemed acceptable.

Things have gotten better over the last couple of years because sound recordists have started talking to each other on social media and comparing rates. We've all found out that some of us were getting paid a pretty decent amount of money and some of us just weren't, and there's been a movement afoot for all of us to charge the same rate. There's been wobbles where people that I've talked to have just thrown up their hands in horror because they can't get away with paying the 1998 rates but they come round slowly because I think they realise that, in actual fact, because we're self-employed we can set our own rates and, if they don't want to employ you because of that money, they might have trouble finding another experienced sound recordist who will do it for less. But we've had to be proactive and I have to be proactive myself in order to say, no this is the rate I'm charging, this is what my peers charge and that's what I'm charging and you can take it or you can leave it. In a nice way. (Sound Recordist)

There has been a bit of conflict, because people have been putting things up there saying they need so and so who can do this and they got £100 a day and some of us more established ones were starting to put down, "Oh, well, do you want me to sweep the floor?" and things like that, being a bit sarcastic about it and they've stopped doing that. We froze them out. We froze them out. They've gone. (Gaffer)

Alongside facilitating the ability of workers to bargain effectively and defend their interests, such online groups provide a vital sense of both place and community in an increasingly fragmented industry. The absence of a formal hierarchical union structure also enables a wide range of voices to be heard and interests expressed. However, it is often because of these characteristics that online groups 'lack the coherence and focus needed to have any substantive or sustainable impact'.[26]

Research conducted in 2004 discussed the need for unions to adjust forms of representation to a changing workforce, arguing that the dominant 'worksite unionsiation' was geared primarily to representing workers in open-ended employment at their place of work.[27] Fifteen years later, this remains an important issue. To continue to be relevant to a freelance workforce, freelancers consider that unions should do more to protect and represent their rights and position in the external labour market, rather than confine themselves to relationships with single employers. Freelancers would like this to include advice on and access to sick pay, maternity cover, pensions, mortgages and other personal lending, alongside providing training and hosting networking events with the aim of enhancing employability. Although online communities and networks are facilitating new forms of collective bargaining and strengthening worker solidarity across disparate employers and geographical spaces, the role of unions in protecting employment rights has arguably never been more important in safeguarding the rights of the UK's fast-growing freelance workforce.

Training and skills development

Universities are often positioned as 'talent pipelines' into the film and television industries. The UK Universities and Colleges Admissions Service, UCAS, currently lists 1,037 undergraduate courses from 174 providers using the search term 'media production', with a further 442 courses in animation. Creative Skillset's 2014 workforce survey reported that 78% of respondents were educated to degree level, while only 1% of the workforce had undertaken an apprenticeship. In Bristol, 72% of respondents to the *Go West!* survey had undertaken a university degree, 40% of which were at institutions in the South West. Nevertheless, the vast majority of the freelancers interviewed maintained that a university degree was not necessary for securing employment. However, a number of interviewees discussed how the contacts they made through university helped them to find their first job in the industry.

> I don't think it's necessary to have a degree but finding a way to emulate or simulate that network building, I don't know how you'd go about that if you didn't do [a degree] because it's all about making friendships and going to the pub and not doing the whole thing of, "Do you have any work? Is there any work?" and just being nice. And then, further down the road … sometimes it's been years later, where somebody that I've met has come back and said, "We've got some work down here." It's that "investment", in inverted quotes, of going to the pub for a few pints over the summer and meeting people and building a network that has paid off in the form of a job. (Animator)

However, in terms of the skills and training obtained through university courses such as media or animation, many employers seemed sceptical about how well this prepared students to work in the industry. Speaking with production managers working for independent productions companies and organisations such as the BBC, there's the sense that graduates are not prepared for the realities of working in television and film. In particular, graduates often expect to enter the industry at a certain level due to the skills and experience gained while undertaking their degree, yet this experience is often limited to very small-scale projects, compared to the realities of working on set as part of a large crew. Alongside this, employers also suggested that graduates were often not prepared for entering the *freelance* workforce and the realities of building a sustainable freelance career. This is also echoed by freelancers themselves when they talk about their own university experience.

It was always, you would train as an animator and then you would go and work for Nickelodeon or something. That would be the end goal. But you can make your way as a freelancer picking up all these small gigs. It's quite exciting. You're making games and making corporate videos that are a little bit boring but kind of cool and trying to put your spin on them, and then doing a series or whatever. (Animator)

This signals a need for renewed efforts to bridge the gap between industry and higher education institutions. While many of those interviewed didn't believe their degree was necessary for entering the industry, further collaboration between universities and the film and television sector has the potential to facilitate networking opportunities and provide on-the-ground training through work experience schemes. Because freelancer labour is dominant within the film and television industries, there is also a need to prepare students with the skills needed to succeed in this type of career, beyond just technical and creative ones. A predominantly freelance industry suggests the need for universities and other educational providers to rethink their curricula and to ensure that students gain a better understanding of the realities of employment in this sector.

Beyond university, shorter term training courses are also a vital way for freelancers to ensure that their skills are up-to-date to meet the latest industry trends and technological advancements such as new software or equipment. Freelancers are often expected to take responsibility for their own training and skill development to meet the changing technical and creative demands of the film and television industries. In some cases employers will pay for freelancers to undertake courses, or include it as part of training for a job. However, in the majority of cases individuals are solely responsible for ensuring that their skills are kept up to date and they are proficient enough in the relevant software and equipment to be employable. Although bursaries are available from organisations such as Creative Skillset to part or entirely fund such training, the freelancers interviewed still described the training courses they wanted to access as being prohibitively expensive both in terms of the cost of the courses themselves, but also travel expenses that might be incurred. This is in line with Skillset's 2014 employment survey, which found that 74% of freelance workers experienced barriers to training in the form of high fees, inconvenient opportunities and fear of loss of earning/work. Further to this, one in five freelancers struggled to find training in their local area.

> There's a lot of training out there. There are a lot of companies that will offer stuff. I see it on Twitter quite a lot, "Come in for a week learning animation at our studio" or "Places available for this, that and the other" but then you need the time. You're spending a week not working and travelling and, if it's in another city, suddenly you're out of pocket trying to learn. You'd be quite fortunate to be in a position where you could afford to do that. Most of the time, you're just trying to pay the bills. (Animator)

With a decline in apprenticeships, freelancers are now increasingly paying to train, rather than being paid to train. The sector would benefit from an increase in local and affordable training schemes to meet the needs of Bristol's freelance community. This might go some way to trying to address the barriers that freelancers currently experience when trying to access training, while also broadening the career prospects for those from less privileged socio-economic backgrounds.

Diversity and inclusion

Inequality within the creative industries has been the subject of extensive scrutiny and debate within academia, the popular press and the industry itself. Women account for just 28.4% of workers in film, television, radio and photography, while BAME workers make up only 4.2% of the film, television and radio workforce.[28] In 2016 the Creative Diversity Network launched Project Diamond, an online system used by the BBC, ITV, Channel 4, Channel 5 and Sky to obtain consistent diversity data. However, the scheme has been boycotted by a number of unions, including BECTU, in order to pressurise broadcasters to publish programme-level diversity data.
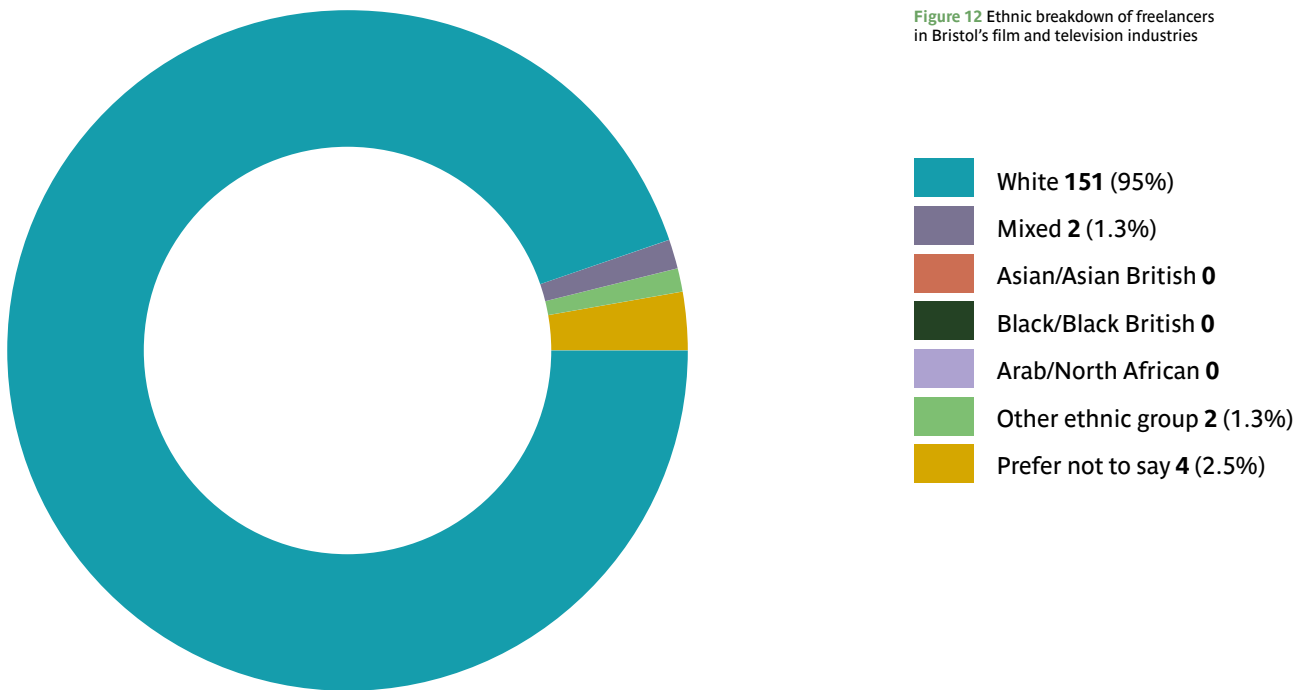
White **151** (95%)

Mixed **2** (1.3%)

Asian/Asian British **0**

Black/Black British **0**

Arab/North African **0**

Other ethnic group **2** (1.3%)

Prefer not to say **4** (2.5%)

The overwhelming majority of freelancers who responded to the *Go West!* survey identified as White, with the proportion of Black and Minority Ethnic (BME) freelancers only 2.6%. This compares to 3.6% of the working population in the South West and 5.4% of workers in the creative industries in the UK as a whole. 25% of freelance respondents had attended a fee-paying school. This is significantly higher than the 14% in the creative industries nationally and more than three times the proportion of the UK population as a whole (7%). 10.7% of respondents were from overseas countries, 13 from countries within Europe and two from outside Europe. 1.9% of freelance respondents identified as disabled, a figure is significantly lower than the 5% of disabled workers in the creative industries overall and much lower than the 11% across the wider UK working population. 10.8% of respondents identified as lesbian, gay or bisexual, which is slightly higher than the 7% in the creative industries and higher than the 6% average in the overall UK workforce.

Male **60%**
Female **40%**

More than half of respondents were male, with 40% of the freelancers surveyed identifying as female. The data, however, did not reveal the proportions of women holding senior positions within the companies. The retention and career progression of women is a significant issue across the industry. For instance, in 2018 the BBC reported that less than half (43.3%) of the corporation's leadership roles were held by women.[29] The picture is even starker at Channel 4, where, despite women making up nearly 60% of the company's employees, 66% of the top 100 roles are held by men.[30]

> I think you get kind of the boys' club going on and you'll get a male [Director of Photography], a male [1st Assistant Director], a male producer and a female director and I've seen that a lot, not bullying but that sort of, 'we know better'. (Costume Designer)

> I know that, in the past, men in my role have been offered more money than women. I've yet to experience it on a job where, for example, if we have two runners that they're paid different but I know it does happen that men get offered more money than women in the same job. (2nd Assistant Director)

A number of studies suggest that the precarious nature of freelance employment has a particularly adverse effect on women. 2010 data from Skillset reveals that women in the UK film and television industries are significantly better qualified than their male counterparts, with a greater proportion being graduates and an even more significant difference in the numbers of women, compared to men, with higher degrees. Women are also significantly more likely to have undertaken industry-specific training. Nevertheless, women earn on average 15% less than their male colleagues and are much less likely to be promoted or to make it into senior positions. During the 2008, recession women lost their jobs at a rate that was six times that of men, indicating the 'particular and heightened vulnerability of women in the industry', especially during periods of austerity and cutbacks.[31]

Women are also leaving the sector after starting a family, with 81% of film workers having no dependent children. In line with these statistics, a number of the women interviewed for the present research described having children and starting a family as incompatible with their current role and career trajectory.

> I think if I decide to have children my job would be a massive problem. A lot of people have to leave the industry because they cannot, by its very nature, do that anymore. That's why I was saying the edit producer role's really good because you are going to work nine to five, whereas if you're on location … So there is always the risk that relationships can suffer or that other part of your life can happen. But in Bristol I do think you'll have more chance of it, I think, of it being okay. (Director)

The interviewee quoted above was one of several who argued that while caring for a child and maintaining a freelance career was still challenging, it was slightly more achievable in Bristol due to the more relaxed attitudes and greater recognition of the importance of a reasonable work life balance described by many of the freelancers interviewed. There are also Bristol-based groups such as 'Freelance Mum' which offers resources and hosts networking events with the aim of 'supporting, promoting and connecting freelance mums across Bristol and the South West'.[32]

> I mean, my experience, now that I've had a kid is that it is do-able, it's just hard. Most people in Bristol thankfully are pretty flexible, if you say I need to pick up my kid they're okay with that and people have gotten used to working around other people's family time. (Editor)

However, film and television work still not only demands long, unsociable working hours, but there is also the expectation to socialise and network afterwards, which further extends an already long working day. Women who had children or were thinking of starting a family also reported being less mobile when seeking job opportunities, as a long commute time would interfere with and be impractical in regard to fulfilling caregiving responsibilities. Other concerns included a loss of income from having to take a day or more off to look after a child who was ill. The absence of statutory maternity leave for freelancers also represents a significant financial burden for those wishing to start a family.

Another frustration that freelancers often confront is a lack of job-sharing opportunities within certain roles and the effect of this on women progressing to more senior positions within the sector.

I can't imagine how it would work, I mean, you work 12, 13, 14 hours a day. If you did have a child and you wanted to put it into nursery, no nursery can cover those hours. I think that probably is the biggest challenge in my opinion as a woman. There is a reason why a lot of people who are head of departments as females don't have children. They've had to make that decision and that's up to them but it is an absolute diversity issue because it stops people from keeping on going. It stops women from getting to the top. They simply can't and it's easy saying, well you'll just make it work, but how? Also, do you want to bring up a child that you have no relationship with because you've always been away? It's funny, I had a conversation with a grip about this literally about a week ago and he made the point of job share and I thought, yeah why not? What's stops us? We're not allowed to job share. But what stops us from job sharing? Why can't we do that? (Production Manager)

Inequalities in the freelance labour workforce are also perpetuated by a lack of formal recruiting procedures. There is a pronounced 'tendency toward homophily: the practice of insiders recruiting in their own image, or selecting candidates with whom they feel they have an easy rapport'.[33] This can make it difficult for women to enter male-dominated sectors and roles.

I think there's an unconscious bias. Obviously they're not actively going to admit to making those decisions. It's the same with, if there were six cameramen's CVs and mine, a lot of production managers, not because it's a direct choice, it is an unconscious bias that exists that says, oh the men will be more reliable, the men are more physically capable. I think it's a difficult one but I think, you do have to work extra hard, whether you're returning to work after children or whether you're a female in a classically-male role. (Director of Photography)

I had someone once call me about a job and then they said, you don't have to pick up kids or anything do you? I know they're not supposed to ask that but that was sort of their casual way of checking if I would be able to work long hours for them. (Editor)

Fluctuating income and the prevalence of low paid entry-level jobs also renders a freelance career inaccessible to those without the financial means to support it. This issue is particularly acute in cities that have a high cost of living such as Bristol and London.

I think a lot of it comes down to telly is really expensive to get into. It's really hard to get into, and I got into like a lot of debt. Living in London, trying to live on a researcher wage, and that was with help from my parents. So that's why so many people in telly are kind of more well off because they've had that initial help at the beginning I think. (Director)

According to the 2018 Panic! Report into social mobility and inequalities within the creative industries, only 12.4% of those working in film, TV and radio are from a working-class background.[34] The report also found that that those who are successful tend to view the industry as a meritocracy and, even more strikingly, are 'most sceptical of the impact of social factors, such as gender, class or ethnicity, on explanations for success in the sector'.[35] The notion that the creative industries are meritocratic was also a prevalent theme when speaking to the freelancers interviewed. The importance of being 'hardworking', 'persistent' and 'resilient' were often discussed as central to building and sustaining a successful career in the film and TV industries.

Yet freelance work is not a meritocracy. Surviving as a freelancer in film and television requires access to financial resources and social capital that is out of reach to many from less privileged socio-economic backgrounds. A lack of formal recruitment procedures and formal frameworks for upholding employment rights leaves freelancers open to discrimination and exploitation. As such, the very conditions of freelance work in its current form militate against ambitions to foster a diverse and equal workforce within the film and television sector.

Freelancers as creative place-makers

Freelancers are often characterised as having a 'a role but not a place'.[36] However, the research conducted for this report strongly suggests that freelance work is inherently situated within place and locality. Bristol's creative economy is the product of particular historical, cultural, political and economic forces that constitute the current industrial context in which freelancers work. The distinct evolution of Bristol as a creative cluster shapes the ways in which freelance networks function and freelance work is experienced. Bristol's relatively small size, coupled with the volume of work available (particularly within certain sub-sectors such as Natural History and Animation), has resulted in a Bristol freelance *community* that is characterised as collaborative in terms of employment opportunities and knowledge exchange.

I do feel a sense of community. Because of the size of Bristol, the industry feels very strong still here so I think it's that sense of community and people help each other. I think there's enough work for people to be a bit more relaxed about it, so if someone does come down from London, doesn't know anyone, you're more than happy to give them a few leads and things like that, whereas if things were really tight, you might not be! (Editor)

Much of the literature on freelance labour naturally focuses on the working lives of freelancers as starting and ending in the workplace itself, but quality of life in terms of where freelancers live is also important. In particular, the ability to maintain a good work/life balance and the ease at which freelancers were able to get around the city were recurring themes throughout the interviews.

> For me personally as a production worker, it's just easier to get around. I can walk to work. I can cycle to work. I can drive to work. I can take the bus. Living in London that's not an option. (Production Manager)

> It's amazing when you get Londoners in Bristol suddenly going, hang on I can go back to my accommodation, have a shower, walk to the pub and still be in bed by 11.30? I did a thing years ago with all of Russell Brand's gang who were very cool and very hip. I was prepping in London with them and they were all like, oh god, we've got to go back to Bristol. They came down and I'd just bought my house and it was just really funny because they were going, hang on how much have you bought your house for? All of them by the end of it were like, I want to move to Bristol! But there isn't the work opportunities. (Costume Designer)

> It's got that right balance of industry and people know when to switch off whereas, what I've heard, the working week in London doesn't really end. You work hard in Bristol but then people know when to stop and take time out to relax. That feels quite important. (Animator)

Such accounts demonstrate how nurturing a thriving production sector is not only a matter of cultural policy, but broader public policy in regard to issues such as transport, education and other public sector concerns that contribute to quality of life beyond the workplace. It could be argued that freelancers are also more embedded in their locality than permanent employees may be because they're more likely to be engaging in network events around the city, meeting potential employers in coffee shops or working in cafes and various co-working spaces on a short-term basis. Because of their mobility, freelancers are active agents of change, through disseminating their ideas and creative practices in various companies and productions, freelancers perform an important role in promoting knowledge exchange and thus contribute extensively to the health, vitality and sustainability of Bristol as a creative city, contributing to the tradition of innovation and free-thinking with which Bristol has been associated traditionally.

Thus, another recurring theme was the notion that Bristol was a creative city which afforded the freedom to develop new ideas and take more creative risks.

I feel like there's a lot on the doorstep filming-wise, and I feel like the city's quite creative and quite sort of, it's just got quite a creative vibe and a freedom to express yourself, so I feel like it's sort of made for media. (Assistant Director)

There's some great ideas coming out of Bristol, really creative, revolutionary stuff that's doing really well online and on TV. Yeah, I think that makes it quite attractive because it seems to me there's a lot more creativity here in general because people have time for it, whereas in London you're just running to catch up constantly. (Director of Photography)

Bristol has long had a reputation for 'free-thinking independence' and 'spirit of innovation'.[37] As Jon Dovey asserts: 'Culture is like terroir. Bristol is an activist/ green/difficult and contrarian place, with creative/tech crossovers such as the BBC Natural History Unit/Hewlett Packard/Toshiba/Aardman. Bristol has vernacular creativity in music, theatre and graffiti. It has local critical mass and freedom to experiment.'[38] The notion of Bristol as city that is creative, culturally diverse and innovative was also strongly evident in the rhetoric employed to persuade the UK's 'alternative' public service broadcaster, Channel 4, to locate one of its new creative hubs in the city. The case of Channel 4 exemplifies how this reputation for innovation and creativity can translate into economic value, making the nurturing of these values a key concern for policymakers in terms of attracting investment in the city. While cities such as Cardiff and Manchester have been subject to national intervention to boost growth in the film and television sectors outside London in recent years, Bristol's creative strategies are largely the responsibility of the local authority. Bristol City Council has played a pivotal role in funding major production facilities and promoting the region as a creative hub, including leading Bristol's successful bid to become a UNESCO Creative City of Film in 2017. These positive changes and growth in Bristol's film and television industries have largely been a result of how the city has been promoted and sold on the basis of its strong local talent pool of highly creative, innovative and experienced freelancers.

Given the enduring role of place and locality in shaping the working lives of freelancers, it follows that any policy directives aiming to nurture a thriving 'creative city' should, rather than attempt to duplicate universal best practice in local contexts, recognise Bristol's creative economy as the agglomeration of particular production cultures situated within a specific place. Rather than 'placeless' nomads, freelancers can be reconceived as both place-makers and a key element in creative economies of cities. Within this context, Bristol's creative economy is an informal economy of both competition and collaboration, in which building networks, sharing resources and exchanging knowledge enables freelancers to mitigate the inherent precarity of their work.

Getting in and getting on in Bristol

Most freelancers in Bristol find and secure work through their networks, with 77.5% recruited through word-of-mouth.[39] Although a reliance on formal and informal networks is common across the creative industries, a number of interviewees characterized Bristol as being particularly insular when compared to cities such as London. This can make it very difficult for people who are new to the industry, or new to Bristol, to secure their first job.

> Because jobs aren't really advertised here it's really hard to figure out who to contact. London does a lot more advertising of work because there's just so much more stuff there, whereas here it's a very insular community of people. They hire people they know, people they like, that type of thing. (Editor)

In common with other studies of freelancers and creative work, those interviewed emphasised the importance of informal networks in gaining employment. While freelance work is often described as a 'reputation' economy in relation to creative/technical skills[40], securing work, particularly in smaller freelance communities such as Bristol, is also heavily reliant on demonstrating good interpersonal skills.

Figure 14 How freelancers learn about job opportunities

Word of Mouth **77.5%**
Other **18.1%**
Advert **4.4%**
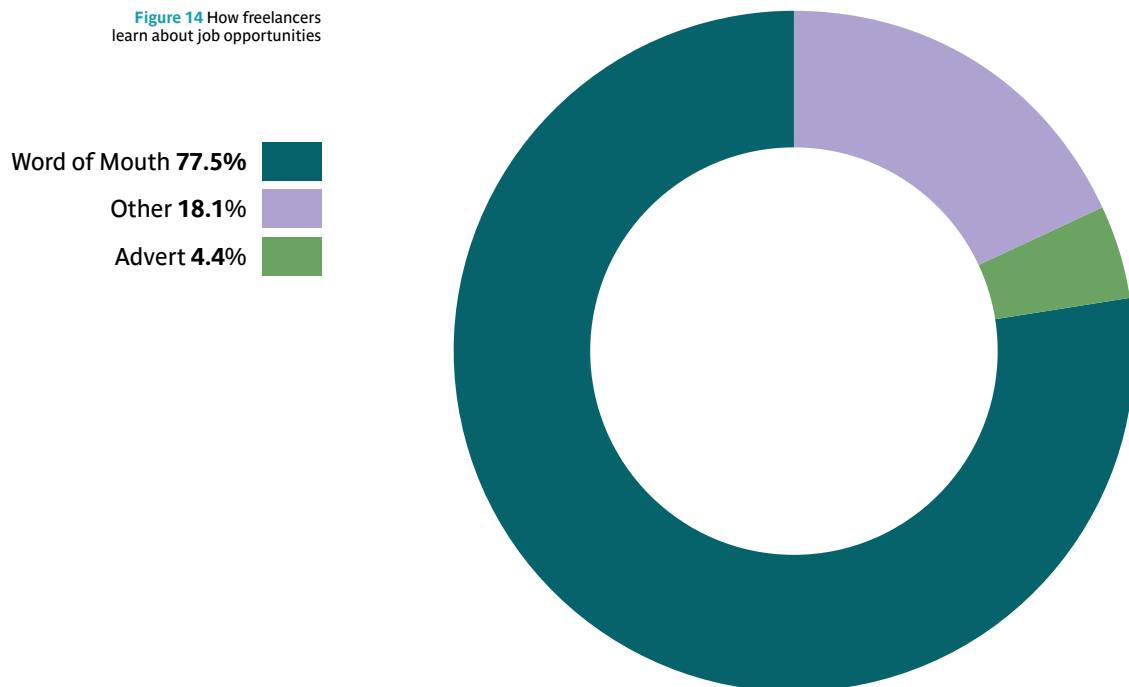
> I've gotten a job from drinking tequila at the wrap party before. We did a pilot and then he had to pick some people from Bristol to go on to do the first series with and he said to me, you were really good fun at the wrap party! It's terrible isn't it, but then maybe that's a skill that I have, you know, that being open to people and being quite personable helps me. (Costume Designer)

> I don't go along to these [networking] events with the intention of maybe someone will have some work. I go along to them because the people there are nice and a bit silly and it's always good fun to hang out with other animators because most of them have a really good sense of humour, which is probably why I've tried to avoid a proper job. A lot of friends who don't work in animation find it surprising that you would hang out with people that you work with. (Animator)

The present findings are line in with a broader study which argues that networking is a central 'means of navigating risk' in the face of highly precarious employment practices.[41] However, as David Lee argues, a reliance on informal networks to secure work serves to maintain and perpetuate inequalities within the film and television industries by 'privileging those with good contacts and social status'.[42] Indeed, the ability to foster good interpersonal skills within this context is often reliant on possessing high levels of cultural capital that align with the dominant middle class values and discourses of the creative industries. While these informal networks create a sense of security for those within them, they also, by their very nature, hinder attempts to increase diversity and promote inclusion within the industry.

The freelancers interviewed also reported that the volume of work available in Bristol was limited by outside production (both UK-based and international) companies not using local crews, and in many cases bringing in crews from London.

> A lot of the time on a job the HoDs [Heads of Department] will be from anywhere because that kind of makes sense, you want the best person. Below that, it should be local as far as I'm concerned but certainly you find on jobs that they'll bring people from elsewhere. It is really frustrating for local crews and I think it does happen quite a lot. You want to find a balance between getting the best person for a job but also having – I mean it's a benefit to a production to have local crew because it's less money, they don't have to put people up and other things. It's difficult and it is frustrating when you hear about local jobs which are just all crewed up by people from London. (2nd Assistant Director)

For some this seemed to stem from a lack of awareness around the scale of the talent base in Bristol, or the belief that talent from London was valued more highly than that found in the 'provinces'. Others attributed nepotism to the lack of local crew on certain productions, particularly in cases where a series had become successful.

> Lots of London crews still get helicoptered into the regions. Twelve years ago I did some sound work on the first series of *Skins,* which was wildly successful. It did very well for Channel 4 but for Series 2, every single technical staff was brought in from London, so everybody who had done Series 1 was out. I don't think there could have been a financial reason because it's cheaper to employ locally, so it was definitely a case of nepotism. (Production Sound Mixer)

As alluded to in the quotations above, there is little financial rationale to justify 'helicoptering' in production crews from London. Particularly with the television industry facing ever-tighter budgets, employing locally has become necessary in order to manage production budgets. However, the value of local crews must not be reduced to financial benefits alone. While in no way insignificant, an overdetermining focus on financial rationales risks framing local crews as the 'cheaper option', further contributing to the narrative that talent outside of London is inferior to that found in the capital.

> I got on my high horse for quite a long time about [productions bringing in London crews], I was like, there's brilliant crew in Bristol! Why are you bringing everyone from London, it's crazy! And also, because if you hire runners and production assistants locally, they know the area. They know where you can park, they know where to get food from, all these little things that make bigger productions run smoothly. It's crazy to bring people in from other places. I think Bristol's traffic is terrible and the road systems are ridiculous, local knowledge is so important. But I think, yeah it was definitely happening five years ago but not so much now, I'm pleased to say! (Director of Photography)

In the context of television, Ofcom currently requires that, in order to fit the definition of a 'regional production', 'at least 50% of the production talent by cost must have their usual place of employment in the UK outside the M25' or 'at least 70% of the production budget (excluding the cost of on-screen talent, archive material, sports rights, competition prize-money and copyright costs) must be spent in the UK outside the M25'.[43] However, production in the nations and regions remains a major recognised issue within the industry, with trade organisations such as PACT and The Indie Club[44] calling for tighter regulation on out of London production. Responding to an Ofcom consultation on regional television production guidance, PACT asserted that 'Ofcom auditing and the compliance process could be tightened up including a published complaints process that would encourage compliance rather than opting for changing the definition.'[45] Unions need to keep placing pressure on regulators to ensure that they protect their members' interests and they should also put pressure on broadcasters to provide data about regional employment in order to highlight any disparities.

Mobility: Bristol and London

Labour mobility is a defining characteristic of freelance work. In order to build and maintain successful careers, freelancers must respond to gaps in the market, resulting in high levels of mobility between employers, places, cities and even countries. In this sense freelancers are distinctive in that they are both embedded within and the result of an industry that is increasingly global. 50% of respondents to the *Go West!* survey made more than half of their freelance income outside Bristol.

The 'pull' of London is often a strong theme in studies about the mobility of labour within the film and television industries. According to NESTA, London accounts for four in ten UK creative industry employees and a third of creative businesses, and that 'the trend is towards more, not less, concentration'.[46] Only one-third of TV production money is spent outside London, while just 35% of full-time jobs in the industry are located outside the capital.[47] In 2016, over half (57%) of the UK film and video production workforce was based in London and the South East.[48] Research conducted for this report found that the factors drawing freelancers to the capital included more prestigious/better funded productions and the greater availability of work. Many of those interviewed expressed the belief that their career would progress faster in London, while others described working in the capital for a few years during the early stages of their career to 'get credits'.

However, routinely absent in such analyses are the push factors that are driving freelancers out of the capital. Reduced quality of life, high cost of living and poor work/life balance were recurring themes within the interviews, alongside the highly competitive and 'cut throat' nature of working in London.

> It's just too busy, too many people, too chaotic, too expensive, too much time commuting. I realised that my career would probably be much further down the whatever road if I'd got more work in London. There are bigger projects. I'd love to work on these things but the trade off would be working in London with some of the nightmares that go along with it. Whereas trying to make it work in Bristol feels like there's still a lot of competition but it's a little bit easier, not easier to stand out, but it's more manageable to get to know that network of people and then find your place. It's got a good balance. (Animator)

London, you're not just competing locally you're competing internationally. I mean it's a world stage here. A film comes in and it's almost like everybody wants to pitch on it. You've got all the local Soho companies, you've got all the international companies pitching, and it becomes a bit of a feeding frenzy. (Visual Effects Designer)

Indeed, many of those interviewed stated that it was possible to sustain a freelance career outside London through opportunities solely in Bristol and the South West. This is in line with statistics from the Bristol Film Office which show a continued growth in investment in Bristol's film and television sector over recent years, with an 11% rise between 2016 and 2017, and the number of filming days recorded in 2017 up by 83% on 2014/15.[49]

Figure 16 VR Demos, Films@59 © Films@59

Expanding the Cluster: Bristol and Cardiff as a Western Powerhouse?

While often treated as distinct clusters, the proximity between Bristol and Cardiff – 44 miles and 50 minutes apart by car or train – has resulted in an economy in which creative freelancers work across the two cities on a regular basis. Over the past decade, Wales has experienced exponential growth in its film and television industries, increasing nearly fourfold in value from £30.2m in 2010 to £108.9m in 2015 (ONS, 2017). As the nation's capital, Cardiff constitutes a creative economy of 2,788 companies and freelancers, with film, TV, radio and photography the second largest creative sector in the city.[50] As Cardiff's 'creative anchor' and centre of excellence for drama, BBC Cymru Wales has produced a number of internationally successful television series such as *Sherlock* and *Doctor Who*. Wales has also been touted as the 'new home of dark drama' following the success of gritty 'Welsh noir' series such as *Hinterland* (2013–), *Keeping Faith* (2017) and *Hidden* (2018). The growth of Cardiff's film and television industries has also been spearheaded by financial support from the Welsh government, with the establishment of a £30m Media Investment Budget for commercial investment in film and TV development, production and distribution in 2014. Here it is important to highlight that Cardiff has not grown incrementally like Bristol but has been heavily 'engineered' by Welsh Government intervention and BBC investment. For example, located just a couple of miles outside of Cardiff Bay, Wolf Studios is Cardiff's newest major production facility for high-end television series and film. The development of the studios was supported by a £4m loan from Welsh Government with the expectation that the facility will contribute to delivering a £120m boost to the film and TV industry in Wales.

Over the past decade evolving institutional policy and initiatives aimed at increasing 'out of London' production has also increased competition between the two cities to secure regional funding. A particular watershed moment in this shift came in 2009 when the BBC announced it would be moving its long-running medical drama *Casualty* to Cardiff after twenty-five years of production in Bristol. The relocation was part of the BBC's plans to double its proportion of network production in Wales by 2012 through investment in high-profile drama, cementing BBC Cymru Wales's identity as a 'centre of excellence' in this genre. In 2018, both Bristol and Cardiff made bids to host the new national headquarters of Channel 4. Both cities lost out to Leeds, but, as noted earlier, Bristol successfully secured one of the two Channel 4 Creative Hubs alongside Glasgow.

Despite this competition and rivalry there is evidence of a shared workforce operating across Bristol and Cardiff as a result of both their relative proximity and the significant increase in the number of freelance workers within the UK film and television sector over the past three decades.

The mobility of freelance labour – both between different employers and across divergent political and cultural contexts – has forged new connections, highlighting the potential for a unique cross-national creative economy within the UK's film and television industry. In 2016 Great Western Cities' published *Britain's Western Powerhouse*[51], a report aimed at persuading politicians to develop an investment strategy to create a cross-border economic region between Cardiff, Newport and Bristol that will rival the northern powerhouse and challenge the south-east of England. At the Severn Growth Summit in January 2018, politicians and business leaders described the upcoming abolition of the Severn Bridge toll in December 2018 as a 'once in a lifetime' opportunity to establish a joined-up approach in terms of the supply of skills and the establishment of a fast, efficient transport infrastructure.

Figure 17 The Severn Bridge
© fatmanphotouk / Adobe Stock

The inherent mobility of freelance labour offers a potential catalyst for this to become a reality. Yet, at the same time, many of the freelancers interviewed reported barriers to accessing work across the two cities due to regulatory quotas and broader political pressure on production companies to employ local crew.

> I tend not to tell people that I live in Newport [South Wales] when I'm working in Bristol unless they specifically ask me. I think that some broadcasters have a regions policy, and because this is Wales, that is England, I think sometimes they need to be seen to be employing locally. So quite often I say, Bristol-based unless I know that they don't care much. There's been times that I haven't charged mileage, just so that they will consider me Bristol-based. (Production Sound Mixer)

A number of those interviewed in Bristol also described Cardiff as constituting a separate network of creative professionals, despite the proximity of the two cities and the presence of national broadcasters such as the BBC and ITV in both locations. While these interviewees expressed a desire to work in both cities, there was a sense that it was difficult to build and maintain the network needed to gain steady work in both simultaneously.

> Cardiff I've found really cliquey. There's a lot of crew there now because of all the stuff they're making, so it gets quite hard to get into Cardiff jobs. There are a set amount of Cardiff crew who just get job to job and it doesn't seem to open up to anyone else really. (2nd Assistant Director)

Although proponents for the Western Powerhouse highlight the strength of the creative industries in Bristol and Cardiff as an incentive for increased collaboration, many of the freelancers interviewed in Bristol referred to the Severn Bridge not only as an economic barrier, but also symbolic of a more deep-seated disjuncture between the two production economies. The formation of a Western Powerhouse and ambitions to increase collaboration and mobility between Bristol and Cardiff will not be a straightforward process. There are a number of historical constraints and barriers that continue to inform the nature of freelance work across the two cities that require further understanding and investigation.

Brexit

Concerns were expressed about the effect of Brexit, both on the ability of British freelancers to work in other European countries and of attracting and retaining international talent in Bristol.

> It always feels like if work ever slows down here, I can look anywhere in Europe and say, "Look, there's some work going in Berlin or Prague and I fancy doing that for a few months, that sounds good." The worry is that the government will mess up the negotiations to the point that those opportunities won't be available as easily in the future. That's not just from a selfish point of view, I worry that other animators in the UK won't be able to take those opportunities as easily as well. (Animator)

> I think [Brexit] could block the influx of more freelance crew and production people, there's quite a big Spanish contingent in Bristol because of Madrid and Barcelona. There weren't many opportunities five or six years ago and there's still a lot of financial difficulties in the country, that a lot of them just quit Spain altogether and came here. I don't know if there's a hub of them in London but there certainly is in Bristol and they all stick together and share work. Some of them are starting really successful companies now and actually doing really well. It worries me that that possibility might not be the case in future. But I think we will be taken advantage of financially because we'll be cheaper! (Director of Photography)

An independent report commissioned by the UK Screen Sector Task Force predicts that possible restrictions on the freedom of movement of people could result in the loss of approximately 5,000 jobs in the UK screen industry through Brexit.[52] British workers looking to work on short-term freelance contracts abroad may also need to apply for a Tier 5 visa at the cost of £230, creating further financial restrictions for those seeking employment outside of the UK.

Although none of the freelancers interviewed referred specifically to concerns about post-Brexit funding, a 2018 report by the BFI reveals that between 2007 and 2017 the UK's screen industries received £298.4 million in EU funding, with £154.3 million going directly to UK-based organisations, £92.4 million to projects in which the UK is involved or is the lead partner, and £51.8 million to European distributors in releasing UK films.[53] Bristol has also benefited from this funding. For instance, MEDIA/Creative Europe part-funded the development of Aardman Animations' long-running television series, *Shaun the Sheep* (2007–), which has since sold to 180 countries. Britain's departure from the EU may have a negative impact the UK's creative economy – including Bristol – if such funds became inaccessible.

Figure 18 'Bristol's Waterfront'.
Image Courtesy of Bristol 24/7

Conclusion

Rather than just mobile labour, the present research reconceives freelancers as both place-makers and a key element in creative economies of cities. Within this context, Bristol's creative economy is characterised by being both competition and collaboration, in which building networks, sharing resources and exchanging knowledge enables freelancers to curtail the inherent precarity of their work. Due the place-based nature of freelance work, nurturing a thriving production sector is not only an issue constrained to industrial contexts, but should also be a consideration within broader public policy in regard to issues such as transport, education and affordable housing that contribute to quality of life beyond the workplace. A further concern is the mobility of creative labour between geographically proximate cities such as Bristol and Cardiff. Further consideration should be given to how current constraints on mobility between these two cities may fuel or hinder creativity. While rivalry and competition over regional funding may drive innovation, this comes at the expense of further developing a shared workforce of highly skilled practitioners based on creative collaboration and knowledge exchange.

This report has also shown that surviving as a freelancer in film and television requires access to financial resources and social capital that is out of reach to many. Fluctuating incomes and the prevalence of low/unpaid work, particularly in entry-level roles, requires individuals to be financially resilient to build and maintain a successful freelance career. A lack of formal recruitment procedures and a decline in established frameworks for upholding employment rights also leaves freelancers vulnerable to discrimination and exploitation. With the decline in apprenticeships and increasing reliance on university courses in media production with all the associated debt, freelancers are now increasingly paying to train, rather than being paid to train. As such, the conditions of freelance work favour the middle classes because they have access to the funds needed to support and sustain such a career. Within this context the very conditions of freelance work in its current form militate against ambitions to foster a diverse and equal workforce within the film and television sector.

Key Findings

1 As an occupational group characterised by their responsiveness, resilience and innovation, freelancers make a vital contribution to the UK's creative economy. Although there has been a general acknowledgement of their importance, existing studies often remove freelancers from the localities in which they work. This report demonstrates that, rather than being 'placeless' nomads, freelancers are both place-makers and key contributors to the creative economies of cities. As such, freelancers make a vital contribution to Bristol's creative economy as an informal economy of both competition and collaboration, in which building networks, sharing resources and exchanging knowledge is the foundation.

2 Without a legally defined status for freelance work, beyond often equally irregular tax classifications, individuals are experiencing the effect of precarious working conditions regardless of actual income or the regularity of their employment. The lack of clear definition or recognition for the inherently ambiguous nature of freelance work can have a negative impact on the financial profile of individuals, making it difficult to secure mortgages or other personal financial lending due to the fluctuating nature of their work.

3 The 'pull' of London is often a strong theme in studies about the mobility of labour within the film and television industries. But often absent in such analyses are the push factors that are driving freelancers out of the capital. Reduced quality of life, high cost of living and poor work/life balance were recurring themes within the interviews, alongside the highly competitive and 'cut throat' nature of working in London. Increasingly, Bristol, and other regional creative clusters, constitute strong magnets for attracting high quality creative talent and help to 'rebalance' the UK economy making it less London-centric.

4 With a decline in apprenticeships, freelancers are now increasingly paying to train, rather than being paid to train. The sector would benefit from an increase in local and affordable training schemes to meet the needs of Bristol's freelance community. This might go some way to address the barriers that freelancers currently experience when trying to access training, while also enhancing the career prospects for those from less privileged socio-economic backgrounds.

5 With many freelancers asserting the importance of co-working for combatting isolation and improving mental health, the rising cost of office and working space within the city arguably has a significant impact on the health and wellbeing of freelancers. Bristol City Council and other agencies should seek to provide affordable office spaces. Alongside encouraging freelancers to work in the city, the provision of accessible co-working spaces would contribute to addressing issues of isolation and wellbeing within the freelance community.

6 Although online communities and networks are facilitating new forms of collective bargaining and strengthening worker solidarity across disparate employers and geographical spaces, the role of unions in protecting employment rights has arguably never been more important in safeguarding the rights of the UK's fast-growing freelance workforce. But to remain relevant to freelancers, unions need to protect and represent the rights and position of freelancers in the external labour market, rather than concentrate exclusively on relationships with single employers.

7 The formation of a possible 'Western Powerhouse' and ambitions to increase collaboration and mobility between Bristol and Cardiff will not be a straightforward process. The inherent mobility of freelance labour offers a potential catalyst for this to become a reality. Yet, at the same time, there are a number of historical constraints and barriers that continue to inhibit freelance work across the two cities that require further understanding and investigation.

8 Concerns were expressed about the effect of Brexit, both on the ability of UK freelancers to work in other European countries and of attracting and retaining international talent in Bristol. There is strong statistical evidence that Britain's departure from the EU may have a negative impact the UK's creative economy – including Bristol – if funding from organisations such as Creative Europe became inaccessible.

Recommendations

1 Freelancers need to have defined legal status with certain employer expectations. This is a pressing issue because the lack of formal definition hinders the ability of freelancers – across all occupations – to access mortgages and other forms of financial and thus contribute to the local and national economy as well as providing greater stability and security in their working lives.

2 The perception of freelancers is that trades unions need to do more to protect and represent the rights and position of freelancers in the external labour market, rather than, as appears to be the case, being confined solely to negotiating relationships with single employers. Freelancers consider that they need to be better informed about access to sick pay, maternity cover, pensions, mortgages and other personal lending, alongside providing training and hosting networking events with the aim of enhancing employability.

3 Freelancers would benefit from an increase in affordable training schemes both regionally and nationally. Such provision might go some way to trying to address the barriers that they currently experience when trying to access training, while also enhancing the career prospects for those from less privileged socio-economic backgrounds.

4 Universities need to respond to shifting work practices by providing curricula in which entrepreneurialism is taught explicitly. They should train and educate students in how to cope with being self-employed and how to find and secure work as a freelancer.

5 Bristol City Council and the West of England Combined Authority (WECA) should seek to provide affordable office spaces. Alongside encouraging freelancers to work in the city, the provision of accessible co-working spaces would help to address the isolation and wellbeing issues experienced by many freelancers.

6 This local study reveals the need for up-to-date statistical information about the size and scale of the freelance workforce within the film and television industries. Organisations such as Ofcom, Creative England and the BFI should endeavour to provide regionally based statistics in as well as national studies to highlight any regional disparities. Ofcom should require broadcasters to monitor and publish the percentage of local crew employed on productions.

7 Freelancers would also benefit from a dedicated South West crew database encompassing Bristol, Newport and Cardiff to alert UK-based and international production companies shooting in the region to recognise the wealth of local talent that is available.

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