



# Go West!

Bristol's Film and Television Industries

Andrew Spicer and Steve Presence

## Acknowledgements

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# Executive Summary

## The Research

This report is based on a seven month research project conducted by staff at the University of the West of England (UWE Bristol) and financed by the Higher Education Innovation Fund. The report was co-authored by Professor Andrew Spicer and Dr Steve Presence from the Department of Arts and Cultural Industries at UWE Bristol.

## Aims and Objectives

The purpose of the research was to analyse the size, shape and characteristics of the film and television industries in the Bristol 'region' – defined as the West of England Local Enterprise Partnership zone. This was important because, apart from the global brands of the BBC's Natural History Unit and Aardman Animations, Bristol's film and television industries are almost invisible and there is no accurate, up-to-date or reliable data about them. By assembling this data and analysing how these industries work as a whole, as an interconnected 'creative cluster', we have been able to understand, for the first time, their economic, cultural and social significance to the region.

## Research Design

In order to generate a range of quantitative and qualitative data about Bristol's film and television production we conducted two surveys – one with companies, the other with freelancers – alongside eighteen detailed interviews with company executives, employees and other workers. We also produced a map to show the companies' location and researched the history of the region in order to understand how the cluster has evolved.

### Figures 1–4

Exterior of The Bottle Yard Studios  
© The Bottle Yard Studios

*Chimpanzee* (Disney Nature, 2012);  
© Silverback Films

Morph © Aardman Animations

Films@59 Mixing Desk; © Films@59

# Our Findings

- 1 Based on the data gathered from our research, we estimate that Bristol's film and television cluster is composed of BBC Bristol, 131 private companies and a pool of freelancers who often work for several companies as well as the BBC. Our survey suggests that the majority (58.2%) of private companies are micro-enterprises and small SMEs. There is a wide diversity of companies but they form identifiable sub-clusters around six specialisms: natural history; animation; factual; post-production; corporate; and facilities. The long-established specialisms in natural history and animation remain the region's principal strengths.
- 2 Bristol's film and television cluster is economically significant. Independent companies alone generated £140.3m for the local economy in 2015/16. BBC Bristol's contribution is not known. We estimate that these industries employ around 3,700 people: 1,000 at BBC Bristol, 1,200 in independent companies and 1,500 freelancers.
- 3 Our research has revealed that film and television companies also contribute significantly to Bristol's cultural health, commercial diversity and international profile. Our Report shows that co-locating in a cluster stimulates the flow and exchange of ideas, new knowledge and technological innovation; the exchange of freelancers helps maintain adequate levels of employment to ensure that talent remains in the region.
- 4 The history and evolution of Bristol's film and television industries have profoundly shaped its present configuration, notably the growth of the BBC's Natural History Unit and Aardman Animations. The cluster suffered significantly from the loss of HTV.
- 5 Although Bristol's film and television industries have major strengths in natural history and animation, deriving from its history, the cluster was perceived by some freelancers to lack diversity. The absence of a regional television drama production company is considered by many to be a significant weakness. Feature film-making, with the significant exception of Aardman's animated features, is also very under-represented. The Bottle Yard Studios has been successful in attracting drama productions to Bristol, but so far these have been made by companies based outside the region.
- 6 Bristol's attractiveness as a place to live and its affordability relative to London contributes significantly to the decisions of companies to locate in the region. However, the principal reason is the skills, talent and expertise of the available workforce and its cultural vibrancy. This success generates its own pressures, especially the high cost of housing and of renting office space, and there is intense competition in some sub-sectors.
- 7 The film and television industries in Bristol face significant challenges with regards to the diversity of the workforce. Black and minority ethnic groups, disabled people and people from working class backgrounds are under-represented, and freelancers' raised several concerns regarding conditions, pay and morale. These issues mirror the national picture in these industries.
- 8 Media organisations and educational providers play a significant role in the region's cultural ecology. Media organisations help to connect, support and celebrate companies and freelancers working in the cluster. Education institutions provide a 'talent pipeline' which sustains the cluster. However, more could be done to address the fragmentation of affiliations and foster closer relationships between sectors.

# Recommendations

- 1 A summit should be convened in order to address the issues raised in this report and how to tackle them. We recommend that this summit should consist of film and television executives, freelancers, educators, policy makers and facilitators in the Bristol region, including Bristol City Council, together with representatives from national media organisations.
- 2 Reliable and up-to-date data about regional production spend in the film and television industries both in Bristol and in other UK regions should be provided by the British Film Institute and Ofcom in collaboration with the Local Enterprise Partnerships. We would specifically urge the BBC to provide a breakdown of its regional spending and employment figures. This would help to enhance the visibility and importance of regional film and television production in the UK.
- 3 Initiatives that would help increase the profile and visibility of the region's film and television industries should be supported. For example, a bid for Bristol to become a UNESCO City of Film would celebrate the city's rich film heritage and the extraordinary talent of those who work here.
- 4 The provision of affordable office space should be addressed by Bristol City Council and other agencies in order to help microbusinesses in this sector to get established and encourage freelancers to work in the city.
- 5 The Bottle Yard Studios should continue to be supported in order to attract more production into the region, especially drama production. Interested parties should work together to explore the possibilities of supporting more feature film-making and television drama production in the region in order to broaden the production base. One possibility would be to create, or re-create, the equivalent of the initial iFeatures scheme for low-budget feature film production whose remit was to 'capture the essence of Bristol – its values, culture and energy'.
- 6 A compelling argument should be articulated for the importance of having a national commissioner for factual programming based in Bristol. This would boost production and help create a richer and more diverse production ecology.
- 7 To help address the lack of diversity in the industry and overcome the fragmentation of affiliations, there is a clear need for greater connectivity and collaboration between different sectors and the creation of more pipelines for talent development.
- 8 An important conduit for this development would be collaborations between the industry and educational providers that are already operating but which are uneven. Companies and educational providers need to work more closely together supported by local and national agencies. Such collaborations and partnerships should be developed in order to support the aspirations of students and trainees and recognise the needs of the industry.

# Introduction

*It's really important that the city council and the mayor and everyone understands the importance of film and television to Bristol. I mean, they're such an asset to the city.*

Bristol is considered to be the third largest centre for film and television production in the UK after London and Manchester. However, apart from the beacons of the BBC's Natural History Unit (NHU) and Aardman Animations, little is known about the structure and characteristics of the city's film and television industries or the nature and extent of their contribution to the region's economic and cultural health.

This study is the first attempt to provide a detailed overall analysis of the size, scale, shape and characteristics of the film and television industries in the Bristol 'region' and to understand their economic and cultural significance. We wanted to explore the reasons why companies and freelancers worked in Bristol's film and television industries, what advantages they saw in locating in this region and any disadvantages or challenges they had to face. Although we identify several economic answers to these questions, our research also demonstrates that these industries are shaped by social, cultural and historical factors as well as commercial ones, and also by political decisions that are part of longstanding debates about the relationship between nation and region.<sup>1</sup> As one of our interviewee's commented:

**'Bristol is successful in a way that doesn't fit with the politics of television and it doesn't fit with what people in London think should happen ... Bristol has only survived because the people here were good. It has no political clout.'**

This report demonstrates how the strengths of Bristol's film and television industries derive from an incremental growth that is based on the talents and enterprise of its labour force and self-help rather than from large-scale external investment.

In what follows we describe our methodology, how we designed and conducted the research, and why our study uses the concept of a 'creative cluster' in order to understand how these industries work. We provide an account of the historical evolution of Bristol's film and television industries without which their present-day configurations would be incomprehensible. Because we wanted these industries to be better recognised and appreciated – by those who work



in them, other researchers, students, the general public and policy makers – we created a database of all the companies, and a map of their location that is included in this report. Because there was little reliable statistical data,<sup>2</sup> we created our own by conducting two surveys with companies and freelancers, and supplemented these with e-mail and telephone enquiries as well as detailed interviews. Having presented our findings in detail, the report concludes by making a series of recommendations, based on the evidence we have assembled, as to what policy interventions might help to strengthen the city’s film and television industries not just to survive but also to thrive.

Our report complements a major survey of the design industry in Bristol and Bath<sup>3</sup> and thus helps to construct a broader picture of Bristol’s cultural industries. We hope it will also contribute to an overall understanding of the UK’s film and television industries. We are acutely conscious that, in such fast-changing and volatile industries, this report is only a snapshot at a particular moment in time. As several of our interviewees observed, these industries will look very different in even five years’ time, hence the need for a follow-up study. We also recognise that further work is necessary, particularly a more detailed study of the major contribution freelancers make to the film and television industries in this region. In the longer term, our intention is to extend the current study by analysing other regional film and television industries in the UK and to understand how they work within a European context.

*Showing Bristol’s importance would help to jolt the London metropolitan people out of their “everything happens in London and nothing good outside of London” mentality.*

Figure 5 Films@59  
Online Edit Suite; © Films@59



# Research Design

This research was financed by the Higher Education Innovation Fund and carried out between January and July 2016. Its purpose was to analyse the size, shape and significance of the film and television industries in the Bristol 'region' as defined by the West of England Local Enterprise Partnership zone:

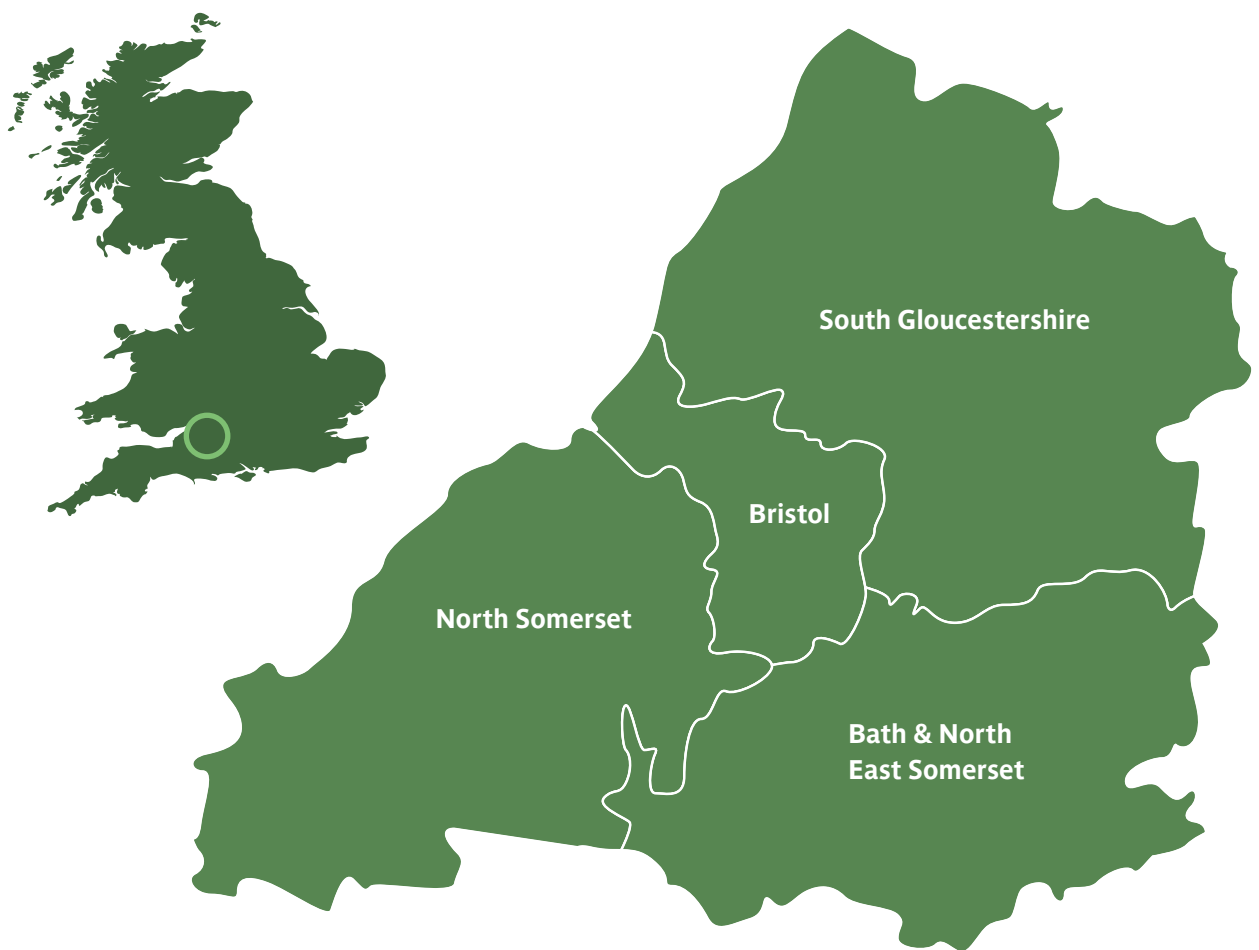


Figure 6 Area covered by the West of England Local Enterprise Partnership Zone

One of our principal aims was to provide up-to-date data which currently does not exist. The British Film Institute (BFI) provides copious information about the size and value of UK film industry as a whole – estimated to be worth £1.4 billion to UK economy in 2015 with an aggregate spend of £1,410 million – but does not offer any regional breakdown.<sup>4</sup> Ofcom provides overall figures for the UK television industry, which spent £2.5 billion on in-house and commissioned original content in 2014, half of which came from the BBC and £350m from the multichannel sector.<sup>5</sup> However, Ofcom also does not attempt any regional itemisation. Where there is a regional focus, the geographical boundaries are often too broad including the whole of the South West or, as in Nesta's *Creative Clusters and Innovation Report (2010)* – which identified the Bristol region as one of nine 'creative hotspots' – film and television production is lumped in with a loosely defined amalgam, the 'creative industries'.<sup>6</sup> The few detailed studies of the film and television industries in and around Bristol that do exist are now all more than ten years out of date.<sup>7</sup>

In order to generate a range of quantitative and qualitative data about Bristol's film and television production, we conducted two surveys – one with companies, the other with freelancers – and eighteen in-depth interviews with company executives, employees and other workers. We focused on the following questions:

- 1 What is the composition of the film and television industries in the region?
  - a) How many companies and organisations are involved?
  - b) What do they do (genre, specialism, service)?
  - c) What is their aggregate turnover?
  - d) How many people do they employ?
  - e) Why are they based in Bristol?
- 2 What is the nature of the freelance community in Bristol and its relationship to the companies in the sector?
- 3 What challenges does the sector face and how can these be addressed?

Thanks to our partners – Bristol Film Office, Bristol Media, Creative England, Creative Skillset, Royal Television Society Bristol and Watershed Cultural Cinema and Digital Creativity Centre that not only provided help and advice in how to nuance the questions we asked but also promoted the surveys through their networks – our surveys received a high response rate. 57 companies from across Bristol’s film and television sector completed the Company Survey, including most major firms as well as numerous micro-enterprises (those with fewer than ten employees). Together this equates to 43.8% of the 131 companies we identified in the region overall, a response rate that is almost double the 24% average for online surveys.<sup>8</sup> 160 freelancers responded to the Freelancer Survey, from producers, directors and production accountants to camera operators, editors, location managers and script supervisors. Though the freelance community is much harder to quantify because of its transient and peripatetic nature, we feel that this number of responses from such a broad range of roles comprises a reasonably sound evidence base from which to make some

Figure 7 River Avon by night  
© Alex Brown / Adobe Stock



legitimate observations. In addition to the surveys and interviews, we undertook an extensive review of existing literature from government, industry and academic sources, as well as coverage of the region in trade journals such as *Broadcast* and *Television*.

The overarching framework for our analysis was based on the concept of a regional 'cluster', a term reintroduced by economic geographers in the 1990s which has become a mantra of local, regional and national policy makers.<sup>9</sup> A cluster has been most simply defined as a 'geographical agglomeration of firms from the same sector that collaborate and compete with each other, and have links with other actors in the location' where 'other actors' includes trade associations and educational institutions.<sup>10</sup> Geographically, Bristol is an attractive city in which to locate a business because of its advantages as the major city in the West of England that has excellent road and rail communications and a relative proximity to London. Bristol also benefits from having a wide catchment area for technical and professional staff along the M4 corridor that provides a large and multi-skilled labour pool.<sup>11</sup>

Clusters, it is contended, stimulate increased productivity and growth mainly through the diffusion of technological and cultural knowledge, ideas, skills and expertise – 'untraded interdependencies' – that foster innovation and new business formation. The informal flow of skilled labour between firms is much more common than formal collaborations in most clusters, and co-location helps to create a rich talent pool of freelancers. This flow of knowledge and information is created through relationships, face-to-face contacts, accidental meetings, news and gossip and local customs and practices that can be both intensely competitive and also mutually supportive. Clusters also act as talent magnets for ambitious, innovative and talented people, particularly in the creative industries.

The advantages of clustering for the creative industries derives from their highly specialized, project-based nature in which each product is unique and therefore has to be constantly modified, adjusted and reinvented through small, incremental changes that build on and develop existing knowledge. These fluid, constantly changing and richly textured social interactions form dynamic 'ecosystems' created by interconnecting and interdependent networks that stretch across the companies in a cluster. However, such phenomena are notoriously difficult to evidence: hence our decision to undertake a number of in-depth interviews. Creative clusters are almost always concentrated in cosmopolitan cities with extended international influence. As such, firms in creative clusters are part of much wider, global systems of production, distribution and exhibition that are an important determinant in how they operate. In what follows, we explore how Bristol's film and television industries have evolved as a creative cluster and the benefits firms and freelancers enjoy from co-location.

# Timeline: Key dates and events

## NATIONAL EVENTS

**1922** BBC founded;  
1927 incorporated under Royal Charter.

**1955** Independent Television (ITV)  
founded, based on regional franchises.

**1982** Channel 4 launched; 'publishing'  
model of broadcasting stimulates  
independent television production.

## REGIONAL EVENTS

**1934** BBC opens in Bristol as regional radio  
production hub; begins making television  
programmes in 1946.

**1956** Television Wales and West (TWW)  
awarded Wales and West franchise;  
began broadcasting in 1958.

**1957** BBC's Natural History Unit (NHU) founded.

**1967** Harlech Television allotted Wales and  
West franchise, taking over the studio facilities  
in Cardiff and Bristol from the defunct TWW.

**1970** Harlech Television renamed HTV;  
split into HTV Wales and HTV West.

**1976** Aardman founded.

**1982** Wildscreen Festival established in Bristol.

1920

1930

1950

1960

1970

1980

1990

**1990** Broadcast Act introduced a quota of 25% for BBC production that must be made by independent companies. This triggered a major expansion of independent production companies in Bristol.

**1990** Films@59 founded from the merger between Films of Bristol and Video Village.

**1990** Icon Films founded.

**1993** Bristol Cultural Development Partnership formed.

**1993** Bath Film Office established.

**1994** Tigress Productions founded.

**1995** Encounters Short Film and Animation Festival founded as 'Brief Encounters' a one-off event to mark the centenary of cinema. 'Animated Encounters' established in 2000 to showcase animation. The two festivals merged in 2006.

**1997** HTV taken over by United News.

2000

**2003** Communications Act introduced new Terms of Trade – much more favourable to independent production companies – and the BBC's Window of Creative Competition (WoCC) that further increased independent production.

**2004** Granada merges with Carlton to create ITV as a single company based in London.

**2004** BBC signals its intention to move jobs to Manchester; Salford Quays site chosen in 2006.

**2008** BBC committed to doubling network television production in Wales by 2016.

**2000** HTV's broadcast licence sold to Carlton and its production facilities to Granada.

**2003** Bristol City Council's Film Office established.

**2005** Bristol Media formed.

2010

**2011** Parts of the BBC (and 3,000 staff) moved to Salford Quays as part of the creation of MediaCityUK, a 'northern powerhouse' of regional production in Greater Manchester.

**2014** EndemolShine Group, the first 'mega-indie', formed from merger of three 'super-indies' – Shine, Endemol and Core.

**2014** The BBC announced a separation of commissioning from production, creating BBC Studios as its new production division.

**2015** Superindies Banijay and Zodiak merged to form second mega-indie, Banijay Group.

**2010** Building work began on the creation of Roath Lock Studios in Cardiff.

**2010** The Bottle Yard Studios opened, owned and supported by Bristol City Council.

**2010** HTV's Bath Road studios sold to property developer.

**2011** After 25 years in Bristol, *Casualty* moved to Cardiff as filming began at Roath Lock; BBC drama closed down in Bristol.

**2016** The Natural History Unit became part of BBC Studios.

## History: The evolution of Bristol's film and television industries

*Bristol is a city of travel and adventure (Cabot, Brunel, Concorde) dissenters and independents, a centre of creativity, commerce, innovation and cooperation which is so stimulating.*

Most analyses of creative clusters emphasise the importance of an historical perspective because of the ways in which they evolve over time to form unique communities of workers who share similar assumptions, habits and practices.<sup>12</sup> Bristol has a longstanding reputation as an innovative and entrepreneurial city that dates back at least to the formation of the Merchant Venturers in 1552. Historically, it has never been over-reliant on one particular industry, its diversified and resilient economy has proved to be adaptable and responsive to change, able to attract new industries that have enabled it to prosper during a period from the 1970s to the present when the UK restructured from a manufacturing to a service-based economy.<sup>13</sup>

Bristol is also noted for its free-thinking independence and this general 'vibe' is an important part of its attraction for creative businesses. The growth of the film and television industries exemplifies this spirit of innovation and independence but has its own particular history that was shaped by three principal factors: the presence of a major broadcaster (the BBC); the spectacular expansion of Aardman Animations; and the growth of independent production. These are discussed in outline in this section; further details are provided in the Appendix, including the demise of HTV, once a major presence in Bristol.

Figure 8 Broadcasting House on Whiteladies Road Clifton; Photo: Andrew Spicer





## The BBC: The 'Creative Anchor'

Creative clusters, it has been noted, need the presence of a large, well-connected firm and Bristol's film and television industries have been dependent on the presence of the BBC, its 'creative anchor', as one of our interviewees described it. BBC Bristol was established in 1934 as the South West's radio hub and, when the BBC was re-structured in the 1970s, became one of three regional production centres that produced both local broadcasts and programmes for national broadcast. BBC Bristol enjoyed this national status largely because of the conspicuous success of its specialist wildlife television division, the Natural History Unit (NHU) formed in April 1957 with an initial staff of eight. Since then, the NHU has developed into the pre-eminent global producer of wildlife programmes that includes such high-profile 'landmarks' such as *Planet Earth* (2006) and its sequel *Planet Earth 2* (2016). It has a current workforce of 160 that swells to 350 during full production with the addition of freelance staff. However, BBC Bristol encompasses more than the NHU, producing local news, a range of children's and factual programming including such long-running shows as *Antiques Roadshow* (1979–) and *Countryfile* (1988–) and had a reputation for innovative documentaries.

BBC Bristol is subject to the consequences of major strategic decisions made by the BBC executive in London. In 2011 the long-running medical series *Casualty* (1986–) was relocated to Cardiff's Roath Lock Studios after having been filmed in Bristol for twenty-five years. The decision had been taken in 2008 as part of a plan to double network television production in Wales by making Cardiff a 'sustainable centre of excellence for drama' and thus fulfil the BBC's overall strategy to enhance the nations (Northern Ireland, Scotland and Wales). A study commissioned by Bristol City Council and South West Screen calculated that the move cost £25 million per year in lost revenue.<sup>14</sup> As a result, many freelancers based in Bristol now work in Cardiff. As one of our respondents admitted: 'There is work in Cardiff and it's not a big commute to get there compared to London. But I'm most often asked if I'm Welsh. I'm going to lie next time and say "yes"!' Bristol also suffers from the enhancement of Manchester's television production through the BBC's partial relocation in 2011 to MediaCityUK on Salford Quays. Nevertheless, the presence of the BBC remains crucially important to Bristol and the NHU has generated a globally recognised natural history sub-cluster, discussed later.

## Aardman Animations

Aardman Animations, an independent animation company founded by Peter Lord and David Sproxton, has enjoyed a remarkable growth from its hand-to-mouth origins in the 1970s through to its present global brand as the creators of *Morph*, *Wallace & Gromit* and *Shaun the Sheep*. Aardman now employs over 150 full-time staff, a figure that rises to nearly 600 when the company is in full production using additional freelance staff. Over the years Aardman has expanded and frequently relocated, in Lord's words 'moving slowly like a hermit-crab inhabiting ever larger shells', moving into its current purpose-built headquarters on Bristol docks in April 2009.

Figure 9 Aardman's shifting locations in Bristol; courtesy of David Sproxton



Aardman has additional studio space in Aztec West on the north-western outskirts of Bristol where its feature films are shot.

Aardman's exceptional success has enabled it to act as a magnet for other animation companies and there is now an animation sub-cluster on Bristol's dockside. The company has also become woven into the fabric of Bristol's civic life, notably through two public art trails, *Gromit Unleashed* (2013) and *Shaun in the City* (2015), which together raised over £3.3 million for charity and significantly boosted the city's economy.<sup>15</sup>

## The rise of the independent companies

The third major influence that has shaped Bristol's film and television industries is the significant growth of the UK's independent production sector, which first developed in the 1980s, triggered by the launch of Channel 4 in November 1982 as a 'publisher broadcaster' which relied on outside companies for its programming.

Even more significant for Bristol was the 1990 Broadcasting Act which required the BBC to allocate at least 25% of its production budget to competitive tender from independent companies. Bristol's first generation of independent companies – such as Available Light Productions, BDH (see case study), Beeley Productions, Green Umbrella, Icon Films, Scorer Films, Testimony Films, Tigress Productions, Quintessence Films and Zebra Productions – were founded in the early to mid-1990s as a consequence of this legislation. Because of the dominant presence of the NHU, many of these new independents specialised in natural history production. The 2003 Communications Act allocated a further 25% to the 'Window of Creative Competition', in which the BBC's in-house producers competed with the independent sector for commissions. In a significant recent development, the entirety of the BBC's in-house production has been commercialised as its own independent production unit, BBC Studios.

The presence of a range of independent companies in Bristol has resulted in a reciprocal, free-flowing relationship between the BBC and the independent sector; as one BBC executive argued: 'a freelancer with particular specialisms might work for lots of different people and indies. All these wonderful people gain skills which in one production or organisation you might not have been able to use. They go out and do things and then you have a big commission and find that they are suitable. They go back and forth like that.'

However, the independent sector is highly volatile with a constant churn of companies and successful independents become attractive for acquisition by 'super-indies' which consist of conglomerations of smaller companies.

## Case Study

### BDH (Burrell Durrant Hifle)

BDH was formed in 1995 through the association of Steve Burrell, John Durrant and Rob Hifle, and now has a sister company, BDH Immersive. The company was located in Clifton in order to be close to the BBC where John Durrant worked before becoming independent. BDH has gained an enviable reputation as the producer of innovative and visually arresting idents, title sequences, motion graphics, music screen visuals and animation, what the company describes as 'loitering at the crossroads of creative content'. Examples include the NHU's *Atlantic*, *Countdown to Life* and *Bosch VR*, a virtual reality viewer and app. BDH is not anxious to expand too much because its three creative directors do not want to become managers and 'have less thinking time'.



Figure 10 Bosch VR app & virtual reality viewer; © www.bdh.net

## The Big Picture: Key statistics

*‘What would be interesting at the end of this (research)? It would be to have an idea about how much money is brought into Bristol and roughly how many people are employed in the sector.’*

# The Companies

## Why Did These Companies Choose to Locate in Bristol?

There were a number of reasons to live in Bristol given by our respondents. The prior existence of a film and television community (22.7%) and the quality of the city's cultural life (19.3%) were the most important reasons. Qualitative comments in the survey often merge these two factors, showing their complex interweaving. Throughout this Report, especially in the next section, we have drawn attention to the importance of Bristol's vibrant cultural life in attracting film and television personnel, who then enrich that culture.

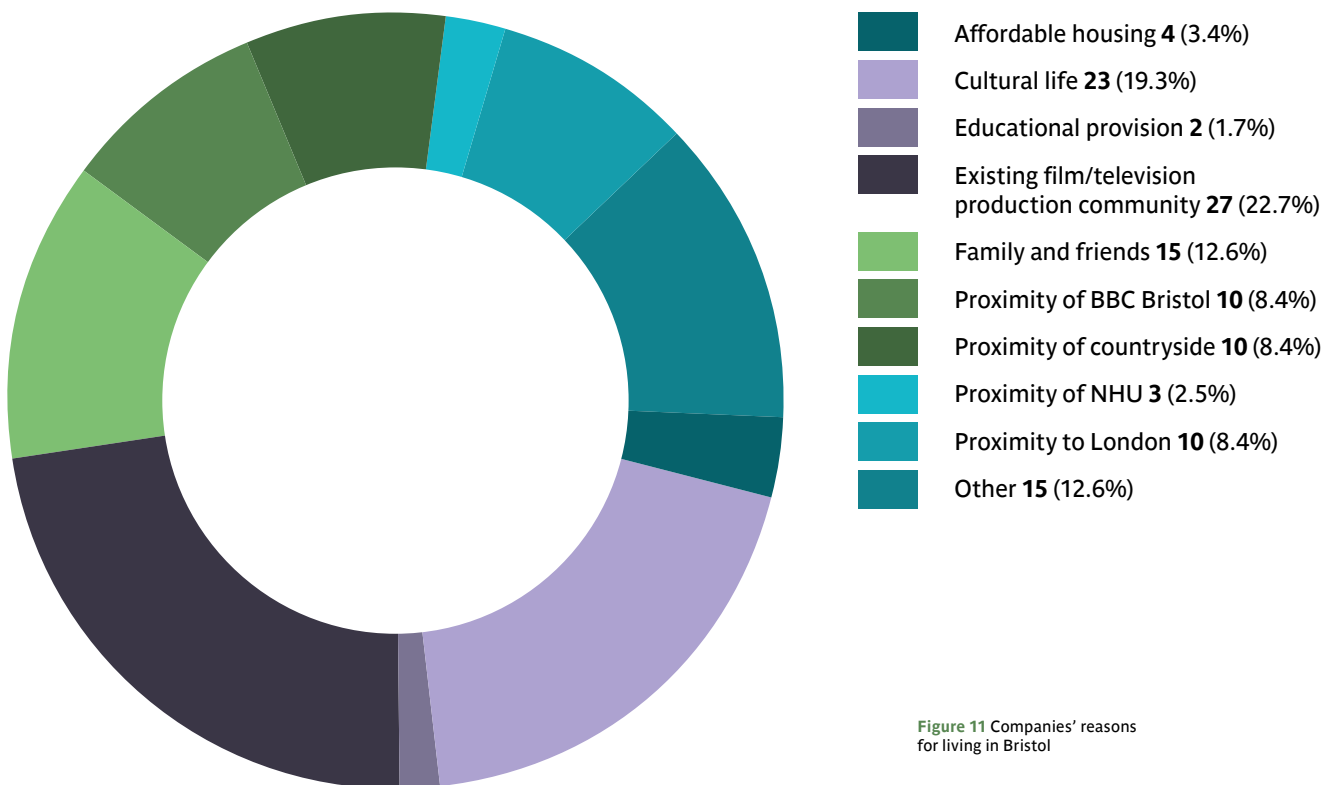


Figure 11 Companies' reasons for living in Bristol

## Aggregate turnover

By melding data from our Company Survey with follow-up telephone interviews, we have obtained turnover figures for 97 (74.6%) of the 131 companies active in the region. Where companies chose to indicate their turnover and employment figures by choosing representative bands rather than giving specific figures, we selected the mid-point in each band. Using the median figures for turnover, we were able to estimate the data for the remaining 33 companies. By combining these estimates with the specific figures available, we were able to calculate that the aggregate turnover for the region's independent film and television industries in 2015/16 was, we estimate, £140.3m. The BBC makes a further significant contribution, but because the corporation does not provide regional figures for its spending that contribution cannot be quantified.

*The aggregate turnover for the region's independent film and television industries in 2015/16 was, we estimate, £140.3m.*

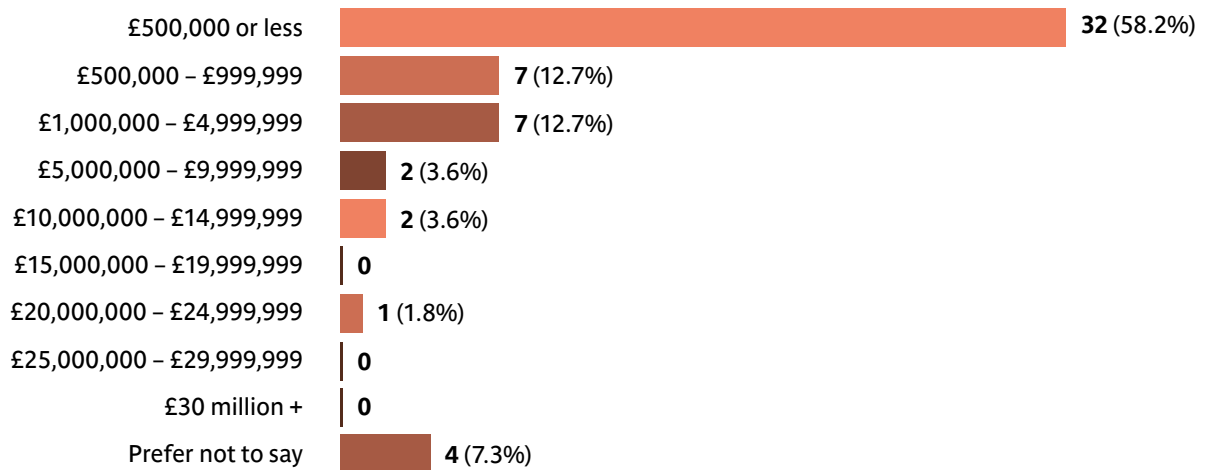


Figure 12 Bar chart of aggregate turnover of independent film and television companies in Bristol

*Total inward investment generated by film and television production in the region in 2015/16 was £17.7m.*

### Inward investment

Each year the film offices in Bath and Bristol calculate the inward investment (as well as the number of productions and filming days) generated by film and television production in their respective areas. Because this revenue is generated from drama productions produced by companies located outside the Bristol region, it constitutes inward investment. The total is calculated from figures provided by the productions themselves or, where not provided, have been calculated using Creative England’s Average Spend Figures for different levels of production budgets. In Bristol, between 2007 and 2017 (the dates for which data is available), inward investment ranged between £16.5m and £25m (fig. 7). In Bath, inward investment hovers at around £1m per year. By combining both figures together, the total inward investment generated by film and television production in the region in 2015/16 was £17.7m.<sup>16</sup>

Inward investment was badly affected by the move of *Casualty* from Bristol to Cardiff in 2011 (see p. 15) but has since stabilised. This year (2016–17) saw a significant growth. The Bristol Film Office has calculated that the number of drama hours produced at The Bottle Yard Studios has increased from 26 hours in 2014 to 42.5 hours in 2016 and the number of FTE jobs has risen from 271 to 377.

Year	Total Inward Investment	Filming Days	No. of Productions
2016/17	£18.4	1133	484
2015/16	£16.7	943	370
2014/15	£17.4	572	460
2013/14	£19.6	650	372
2012/13	£16.5	611	198
2011/12	£19.0	1044	236
2010/11	£20.1	1278	241
2009/10	£21.0	1225	240
2008/09	£20.0	1117	252
2007/08	£25.0	1400	300

Figure 13 Inward investment (in millions), filming days and no. of productions in Bristol, 2007–17. Source: Bristol Film Office.

### Size of companies by number of Full-Time Equivalent employees

The majority of companies in the cluster are micro businesses (those with less than ten employees) as shown in the following table. This data is based on the 97 companies for which we were able to obtain data, or 74.6% of the 131 companies in the cluster overall. Because these figures represent three-quarters of Bristol’s film and television companies, we are confident that they depict the overall picture.

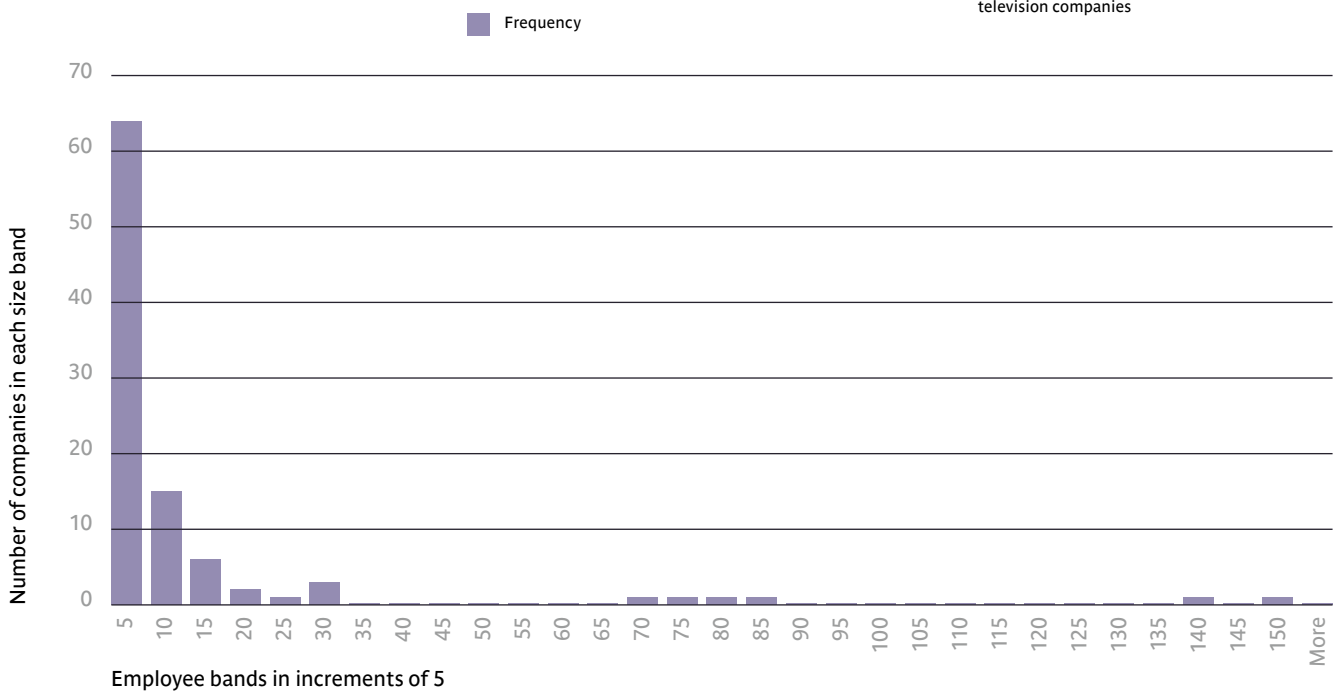


Figure 14 Frequency Distribution Table of FTE employees in Bristol's independent film and television companies

*Film and television industries account for a total of 3,700 jobs.*

### Employment patterns

The employment data obtained from our surveys was adjusted using the same method as in the companies' aggregate turnover: where companies chose to give their employment figures in bands rather than specific figures, we selected the mid-point in each band. Based on these calculations, we estimate that the independent sector employs 1,200 FTE staff. In addition, BBC Bristol employs around 1,000 staff.

The number of freelancers working in the Bristol region is very difficult to calculate: official records of regional freelancers do not exist, and the nature of short-term employment makes them hard to track. Our survey responses suggest that about 1,000 freelancers are employed by the independent sector at any one time. Though numbers of freelancers employed by BBC Bristol are not available, because it is almost the same size as the region's independent sector in terms of the number of staff employed, and taking in to account that much of its work is produced by in-house employees rather than freelancers, a reasonable estimate would be that BBC Bristol employs an additional 500 freelancers although some of these would also work for other film and television companies in Bristol. By combining the BBC and the independent sector, we calculate that Bristol's film and television industries account for a total of 3,700 jobs. However, those proportions may change as the result of the creation of BBC Studios.

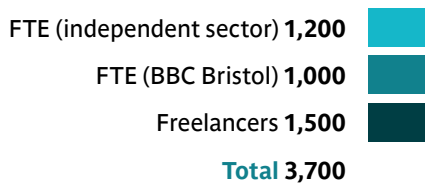


Figure 15 Bristol's film and television employment figures (estimated)



## Where Do Companies' Employees Live?

The majority of employees working in Bristol's film and television industries live locally.

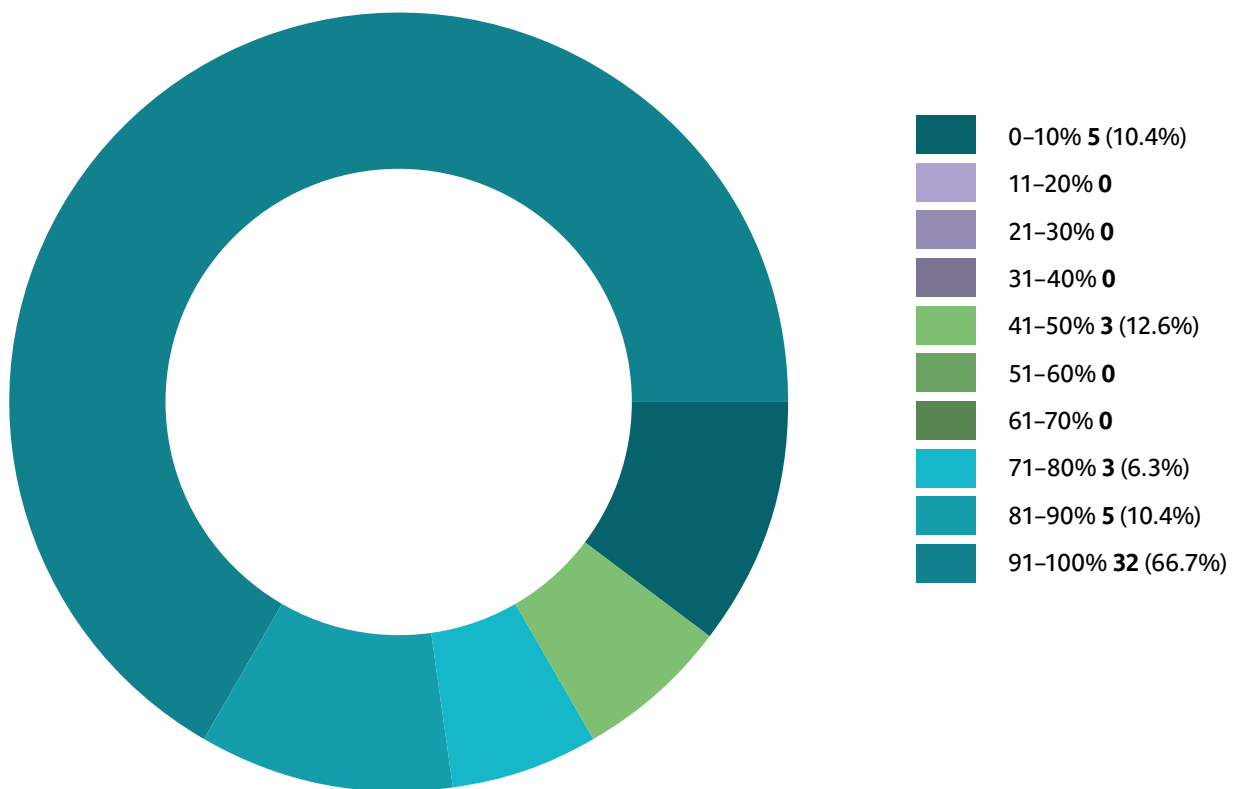


Figure 16 Percentage of independent film and television companies' employees living in Bristol, Bath, Weston-Super-Mare and the surrounding countryside

# Sub-clusters: How these companies work together

As creative clusters mature they often develop more specialised sub-clusters that gravitate around a particular company in a specific locality, or they exist within a looser, more dispersed network. Our research identified six film and television sub-clusters in Bristol: natural history, animation, factual, post-production, corporate and facilities.

Figure 17 Bar chart representing size of sub-clusters by number of companies

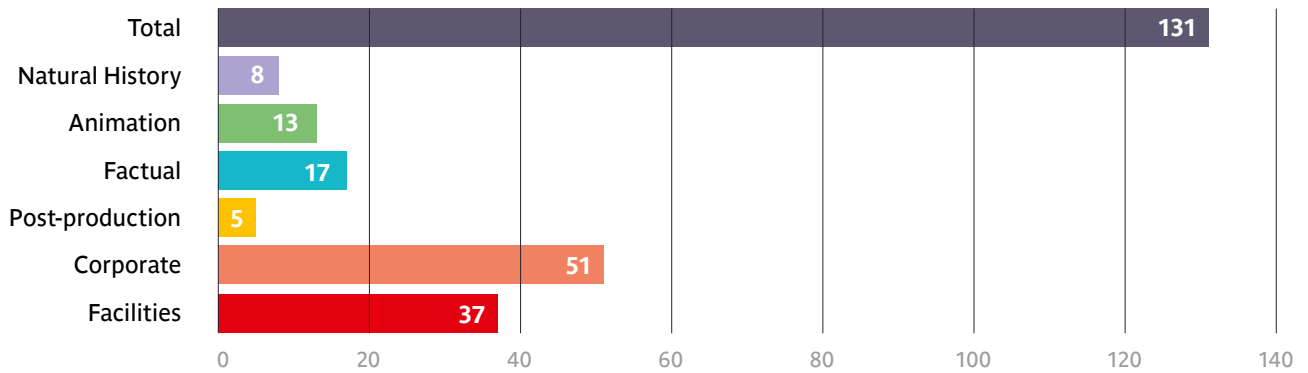
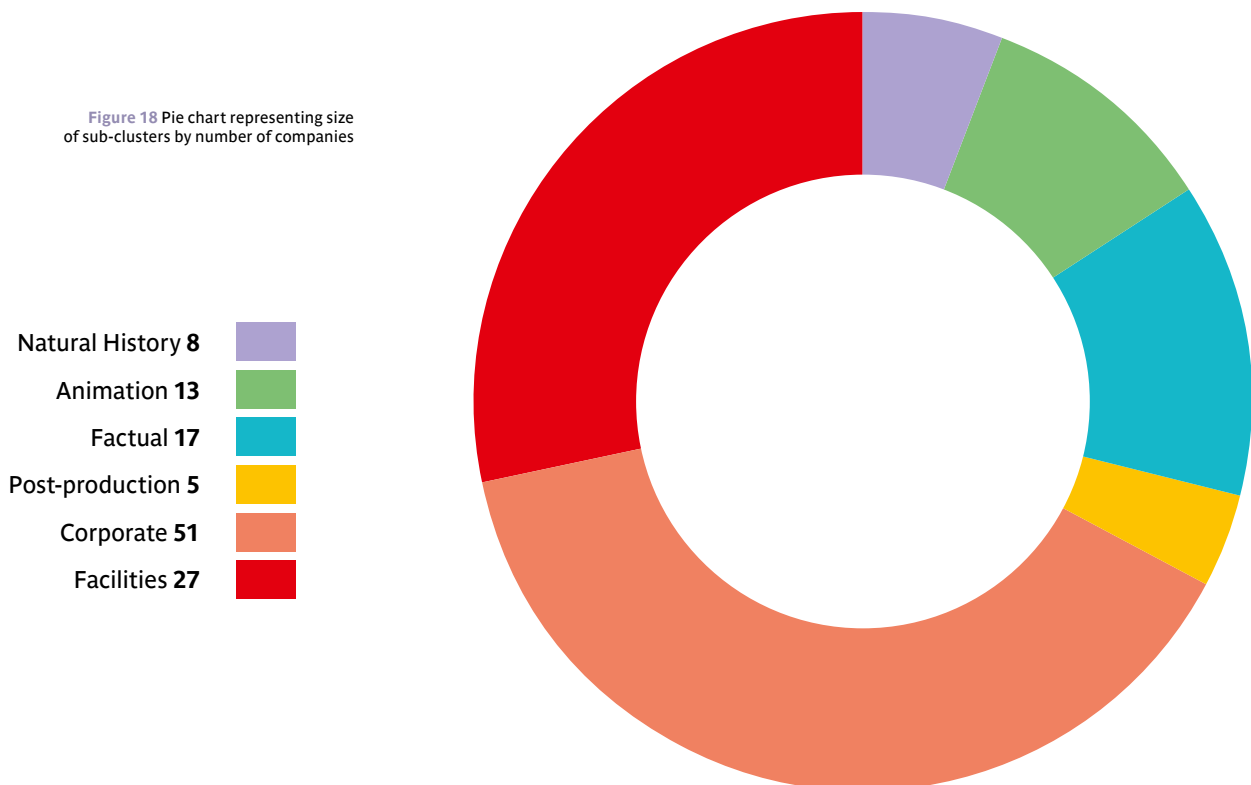


Figure 18 Pie chart representing size of sub-clusters by number of companies



## Bristol Film and Television Sub-Clusters

The first four sub-clusters owe their existence, at least initially, to either the BBC or Aardman; the latter two are the result of the increasing size and gravitational pull of Bristol as a regional production centre. However, many companies work across more than one category. On our map (see inside back cover), we have colour-coded companies to the genre that characterises the majority of their work. Companies such as BDH, Kiss My Pixel or NymbL, which operate at the intersection of animation, motion graphics, visual effects and, increasingly, Virtual Reality (VR), often work on broadcast commissions as well as for corporate clients and are hardly captured by the 'corporate' label to which they have been assigned. Increasingly, even the overarching terms 'film' and 'television' are arguably inappropriate in a digital era in which 'content' is produced for and consumed across a range of platforms and devices. Nevertheless, we think that such categorisations are useful, at this moment in time, in order to capture the ways in which a mature cluster functions.

### 1 Natural History

When we looked for this office, I just put a pin in the BBC and drew fifty yards around it.<sup>17</sup>

This sub-cluster has been spawned by the success of the NHU and includes AquaVita Films, Brian Leith Productions, John Downer Productions, Silverback Films and Tigress Productions. Taken as a whole, it has been claimed that this sub-cluster, the 'Green Hollywood', produces one third of all natural history films worldwide.<sup>18</sup> It has generated its own biennial festival and award ceremony, Wildscreen, which is held in Bristol

For natural history, it's the best place to be undoubtedly because all the talent is here, all the expertise .... If you were just going to look at the whole world and say, "Where am I going to set up a natural history company?" Come to Bristol. No two ways about it. Not only does the production expertise gravitate here but also post production people and others ... it's so specialised that all the people you want are here. You couldn't possibly make what we do in Los Angeles. It would be a pain in the neck. We would have to train people and stuff. It just wouldn't be viable.

The companies in this cluster are financially independent of the NHU and often work for overseas broadcasters such as Animal Planet or National Geographic as well as competing for domestic commissions from the BBC. However, the relationship between the independent firms and the NHU remains one of

interdependence and mutual support: ‘a natural history fraternity’, as one senior executive put it to us. They both cultivate and share the highly specialist freelance labour pool on which each depends and which neither could sustain on its own. They also depend on one another’s success to ensure continued audience (and commissioner) demand for natural history programming:

We need the NHU to punch its weight and compete with drama ... if the NHU produces a terrible landmark in a prime slot that fails with the audience, that’s a disaster for us ... because our market has been eroded. All the commissioners think “Natural History doesn’t work anymore, let’s put our money elsewhere.” We’re in it together. Our biggest threat is if the international marketplace loses faith in natural history.

Because all organisations in the natural history cluster depend on the same specialist labour pool and a post-production sub-cluster with specialist skills in natural history, they are tightly grouped near the BBC Bristol studios on Whiteladies Road.

## Case Study



### Silverback Films

Silverback Films was formed in 2012 by Alastair Fothergill and Keith Scholey both of whom are ex-heads of the NHU. The formation of the company was driven by their desire to be programme-makers rather than organisational ‘suits’, to be independent and to make programmes with more-or-less complete creative control that deal with conservation issues. Silverback specialises in the production of high end wildlife films for both television and cinema including *Monkey Kingdom* for Discovery and *The Hunt*, for the BBC. Silverback, in partnership with World Wildlife Fund, has embarked on an eight part series, *Our Planet*, for Netflix that has emerged recently as a major commissioner. Silverback is typical of recent developments in the television industry in becoming increasingly internationally-oriented. Only 4% of its revenue comes from the UK and Los Angeles is a more important commissioning centre for Silverback than London.

Figure 19 *Bears* (Disney Nature, 2014); © Silverback Films

## Case Study

### Tigress Productions

Tigress Productions was founded in 1991 by ex-ITV natural history producer Jeremy Bradshaw in London as a subsidiary of Tiger (later Tiger Aspect) Productions. Tigress relocated to Bristol as the gravitational centre of natural history programming and was acquired by Dutch-based super-indie Endemol in 2009. Although Tigress reports to what is now EndemolShine, it retains its independence because of its high reputation for producing innovative and contemporary adventure, survival, natural history and science programming such as *The Great Shark Chase* and *Medical Mysteries*. Tigress works, often in partnerships with another company, with all the major UK broadcasters and several American ones including Discovery, Animal Planet and National Geographic thus demonstrating the combination of local proximity and global reach so characteristic of Bristol's larger independents.



Figure 20 John Bishop's *Gorilla Adventure* (ITV, 2015); © Tigress Productions

## 2 Animation

Because Aardman, now a global company, has chosen to remain in Bristol rather than relocate to London or even abroad, it has attracted a major influx of creative talent into the city. Its expansion has enabled Bristol's animation community to develop into its own sub-cluster, with a whole range of companies working across corporate, television, and commercials. The animation sub-cluster is concentrated on the docklands near Aardman itself and at Paintworks, the 'creative quarter' on the east of the city. Animation companies include Arthur Cox (see case study), Giggle, Rumpus, Shadow Industries and Wonky; 422 South specialises in animation post-production, CGI and visual effects; Green Ginger specialises in puppetry for stage and screen. This sub-cluster also has its own associated institutions such as *Skwigly*, the longest-running animation magazine in the UK. As with the natural history sub-cluster, animation companies are no longer dependent on Aardman, which now services more of its own productions but these companies continue to share freelance talent.

## Case Study

### ArthurCox

ArthurCox, the partnership between Sally Arthur and Sarah Cox, began operating in London in 2002 before moving to Bristol and is located near to Aardman on Spike Island. Both Arthur and Cox have worked on productions for Aardman and several of its staff work across the two companies. ArthurCox works principally in animation ranging across a variety of platforms in 2D and CGI for broadcast and branded content. The company branched out into live action with the feature film *8 Minutes Idle* (2011), funded as part of the iFeatures scheme for low-budget production. The company has recently completed several series of *Nina Needs to Go* for Disney junior and is currently developing an animated feature film *Jasia*.

Figure 21 *Jasia* © worldofarthurcox.com



### 3 Factual

Like the natural history and post-production sub-clusters, Bristol's factual companies are predominantly based near the BBC on Whiteladies Road. Those that have prospered are ones that have been able to diversify such as Icon (see case study) by combining specialist factual programmes with more general commissions. A notable exception is Testimony Films (see case study), which was, along with Available Light and Quintessence, one of the first factual producers in Bristol not to focus on natural history. Other Bristol-based factual companies include Drummer TV, Keo West, Love Productions, Plimsoll Productions (see case study), Dragon Fly and RDF Television. Because factual is a genre with broad audience appeal that lends itself to potentially lucrative formats, companies in this sub-cluster are independents that are most likely to be acquired by the larger 'super-indies'. Keo West – albeit still independent – is part of Keo Films multinational, a production and post-production company; Love is owned by Sky, Dragon Fly by EndemolShine and RDF by Banijay.

## Case Study

### Icon Films

Icon Films, founded in January 1990 by the husband and wife partnership, Harry and Laura Marshall in a basement of their house on Kingsdown Parade in Bristol, has grown significantly, moving into its current premises on College Green in July 2010. Icon produces factual television programmes for UK and US broadcasters, specialising in three genres: History, Travel and Adventure, and Science and Nature. The management of Icon is neatly divided between Laura Marshall, who, as Managing Director is responsible for overall strategy, personnel development and marketing and Harry Marshall as the Creative Director overseeing Icon's original productions. Icon's first documentary, *Queen of the Elephants*, formed the basis of its reputation as a specialist in programmes about exotic cultures and wildlife and secured a major contract with the Discovery Channel thereby affording a foothold in the notoriously difficult American television market. This became the foundation for the company's economic success and subsequent expansion and Icon now produces a broad range of programming types. Icon's staples – repeat series including *River Monsters* now in its eighth season, together with the regular supply of material for the BBC's *The One Show* – enable the company to take greater creative risks on its more challenging documentaries such as *Africa's Fishing Leopards*.

Figure 22 *River Monsters*, presented by Jeremy Wade (Animal Planet; ITV; Discovery, 2009-); © Icon Films



## Case Study

### Plimsoll Productions

Plimsoll Productions was founded in September 2013 by Grant Mansfield who started in the BBC as a documentary producer before working in Los Angeles as CEO of Zodiak USA, Managing Director of RDF and Head of Programmes at Granada. He is assisted by Andrew Jackson as President of International Productions, an ex-Head of the NHU before working as Managing Director of Tigress until 2011. Plimsoll is ambitious to expand and has grown rapidly to become the sixteenth largest UK 'true indie'. It employs six 'business-winning execs' whose function is to sell content to broadcasters; Plimsoll's outputs range from natural history programmes such as *Tales from Zambia* to factual entertainment such as *The Secret Life of the Family* and *Prom Crazy: Frocks and Ferraris* about the multi-million pound industry that has grown up around sixteen-year olds coming-of-age. Because little, if any profit is made from making the programmes themselves, Plimsoll prefers to make formats rather than single programmes accruing its major revenue from distributing and selling the rights to other countries.

Figure 23 *The Secret Life of the Family*  
(Channel 5, 2016); © Plimsoll Productions





# Case Study

## Testimony Films

This company was founded by Steve Humphries in 1992 and has become one of the UK's most successful producers of historical and life stories, including *Britain's Greatest Generation* about Second World War survivors made for BBC 2, *The Paedophile Next Door* for Channel 4 and a series of programmes about 9/11 for National Geographic. Testimony regards itself as 'extended family' with no desire to grow but to continue making documentaries about forgotten or untold stories funded through advances from commissioners over which its team has full creative control. Humphries was born and bred in Bristol and his decision to base Testimony in the city was both a personal choice and because of the encouragement he received from BBC producer Peter Salmon who commissioned many of its early series. Although its relationship with the BBC is now far less significant, Testimony has strong roots in Bristol where it intends to remain.



Figure 24 *The Lost Hero of 9/11*  
(Channel 4, 2013); © Testimony Films

## 4 Post-production

The five companies that currently comprise Bristol's post-production sector – Doghouse Post Production, Evolutions, The Farm West, Films@59 (see case study) and the specialist sound studio, Wounded Buffalo – are all based on or around Whiteladies Road in Clifton. The current post-production cluster dates from the early 1990s and the rise of Bristol's independents; the longest-running firms, Films@59 and Wounded Buffalo, were founded in 1990 and 1991 respectively. The post-production cluster expanded in the 2000s: Big Bang and Doghouse both opened in 2004. The Farm West, a regional office of the

## Case Study

### Films@59

Films@59 was formed in 1990 by Gina Fucci – who moved to Bristol from New York City in her early twenties having learned skills from her father, an editor of Broadway commercials – Jean Thompson and Jim Guthrie, ex-BBC employees who relocated to Bristol when the BBC shifted some drama production notably *Only Fools and Horses*, to the South West. The company arose from the ashes of two existing Bristol-based post-production companies, Films of Bristol and Video Village, the latter formed by a group of technicians that had been made redundant by HTV. Films@59 has expanded to become one of the leading post-production houses outside London, taking over another Bristol post-production company, Pink House, in 2003 and now has a base in Cardiff. Films@59 works with a wide range of companies and filmmakers to avoid over-dependency and prefers to collaborate throughout the production chain offering advice about equipment, budgeting, costs, quality and the eventual edit. Like all post-production companies, it is affected by yearly fluctuations in the number of films and television programmes being produced and the company expands or contracts depending on the amount of work that is available.

Figure 25 Films@59 Editing Suite; © Films@59



multinational post-production business, The Farm Group, moved to the city in 2004 to work on the Endemol production, *Deal or No Deal* (2005–2016), which transferred production to The Bottle Yard Studios when this facility opened in 2010. Competition in this sector intensified when Evolutions Bristol, the regional office of the London-based firm, moved to the city in 2014 and acquired Big Bang though without job losses. The Farm West opened a major second facility on Whiteladies Road in January 2016.

## 5 Corporate

Corporate firms – often referred to as non-broadcast or simply ‘content creators’ – make work directly for online distribution across a range of platforms for a broad range of clients. Consequently, the corporate production sector is extremely diverse making a range of outputs from branded content and educational films to music videos and short dramas and documentaries. Companies range from substantial agencies with a range of large corporate and public sector clients such as Hello Charlie, to small boutique studios such as Pixillion or Snowline Productions that employ a handful of staff. Others specialise in niche markets, such as The White Balance Imaging, which works in the architecture industry, or Dragon Fire Films, which specialises in science communication films for schools. Corporate production firms work directly with their clients to produce mostly short-form content often on very fast schedules – ready in hours or days rather than weeks or months. Data analytics is central to the sector, as is an understanding of the myriad platforms available and an ability to find and exploit micro-markets.

The development of this sub-cluster is hard to gauge because company statistics have not existed at this level of granularity before. However, corporate production represents the largest sub-cluster of companies in Bristol: 51 companies – 38.9% of the overall total. The size of the cluster in Bristol supports the claim in a recent report on corporate production that:

the demand for non-broadcast content, together with the need for producers who understand how to work with it, has led to the growth of a very significant new production community ... entirely outside of the established culture of the independent television production companies.<sup>19</sup>

Because more content is now created for non-broadcast distribution than for broadcast, and with more broadcasters themselves realising the opportunities presented by the online market and creating bespoke content for platforms such as Snapchat, Instagram and Facebook Live, this sector will continue to expand.

## Case Study

### Aglow Films

Aglow Films was founded in 2012 by Chris Murnaghan and Jack Dennis as a film production company and video marketing agency that specialises in web-based video content for both the private and public sector. The company has built up a portfolio of commissions for global brands, academic institutions, charities, independent organisations and local businesses. However, although corporate work forms the basis of Aglow's operations, the company is also attempting to produce an in-house feature film that will be exhibited on the festival circuit in 2017 as a complementary venture to its existing corporate commercial base.

Figure 26  
© Aglow Films



### 6 Facilities

Facilities firms comprise the sixth sub-cluster. They range from equipment hire companies (such as Chieftain or 180 Film Services), transport services (Studio Cars), aerial filming services (Bailey Balloons) and animal wrangling (Lloyd and Rose Buck) to costume hire (Bristol Costume Services), model-making (Amalgam; Codsteaks; John Wright Modelmaking), set design (Set Smith) and scaffolding services (TR Film and TV Scaffolding). Studio spaces comprise a significant part of the facilities sub-cluster. The Bottle Yard Studios is the largest of these and houses many smaller facilities firms on its site in the south of the city (see case study). However, a number of smaller studio sites also exist across Bristol. SceneQ Studios in Bedminster provides green screen studio and equipment hire services as well as video production, post-production and design services. Band Films, on Whitby Road near Paintworks in Brislington, offers two studio spaces, a range of dry and wet hire options, equipment and production services. Bristol Film Studios in St George offers production, post-production and studio hire services.

## Case Study

### The Bottle Yard Studios

Bristol now has its own substantial permanent studio space, situated in Whitchurch on the southern edge of the city. The Bottle Yard Studios is the largest dedicated film and television studio facility in the West of England with eight stages, giant green screen, large backlot, workshops, production offices, costume and dressing rooms. It also has a growing business community of around 20 on-site tenant companies providing a number of specialist creative, digital and technical services, making it a 'one-stop shop' for productions. The Studios are owned and managed by Bristol City Council, which made the insightful decision to take over the complex from the regional development agency in a bid to help develop a run-down area of the city whilst also boosting Bristol's already well-established film/TV production industry. Since opening in 2010, The Bottle Yard Studios has hosted a number of prestigious UK and US television productions including *Broadchurch*, *Poldark*, *Sherlock: The Abominable Bride*, *Galavant* and *Wolf Hall* – alongside ongoing series such as *Trollied* and the long-running game show *Deal or No Deal*. The Bottle Yard has benefited from Bristol's skilled local labour force available to crew productions as well as from the city's other existing infrastructure, including transport, accommodation and service facilities. Production companies using the Studios also benefit from having a variety of striking South West locations within easy reach, whilst still being relatively close to London where the majority of their Head Offices are based.

Figure 27 Green screen at The Bottle Yard Studios © The Bottle Yard Studios



# Bristol's Media Organisations and Educational Providers

Potentially bridging the gap between companies and freelancers are a number of media organisations that play an important role in increasing the visibility of Bristol's film and television industries by facilitating communication and collaboration within it and celebrating its achievements in the form of festivals and award ceremonies.

The two key membership-based organisations in Bristol are Bristol Media and the regional branch of the Royal Television Society: RTS Bristol. Bristol Media was founded in 2005 with a remit to support, develop and grow the creative media community in the city. As such, like its partner organisation in Bath – Creative Bath – Bristol Media works across the creative industries. It hosts an annual conference, Vision, and lists jobs and news about the sector on its website. The RTS is a national organisation that was founded in 1927. It consists of thirteen regional centres across the UK, of which the Bristol branch is the oldest, formed in 1946. RTS Bristol runs regular educational and networking events throughout the year as well as its own annual awards ceremony in March. Smaller, more specialised networking organisations also exist for various sub-clusters: Bristol Crew, the Bristol Editors Network and Natural History Network in Bristol, and BathSPARK which supports the creative tech community in Bath. Each performs similar networking functions for the sector they represent, sharing jobs, promoting talent and providing discussion fora.

Bristol hosts two major film festivals (as well as a plethora of smaller ones). The oldest is the biennial Wildscreen festival, which was started in 1982 by the ornithologist Sir Peter Scott, and the former head of the NHU, Christopher Parsons, to celebrate natural history filmmaking through the presentation of Panda Awards in various categories. A charity, Wildscreen hosts a range of smaller events between festivals, as well as running conservation projects and curating an archive. Encounters Short Film and Animation Festival was established in 1995 as Brief Encounters short film festival before merging in 2006 with its animated counterpart, Animated Encounters (established in 2000). Brief Encounters is now the UK's leading short film and animation festival and forms a prestigious international showcase for those who are selected. These festivals play an important role in bringing international industry representatives to the city and in celebrating the achievements of those who live and work here. The Bristol Cultural Development Partnership (BCDP), funded by Bristol City Council, Business West and Arts Council England, has initiated and supported a range of cultural initiatives and infrastructure projects across the city since its foundation in 1992. A more recent organisation that works across the cultural industries is Bristol Festivals, launched in 2016, whose remit is to support festivals and events across the cultural sector.

The region also benefits from the work of several business organisations notably Business West, Invest Bristol and Bath, and the West of England Local Enterprise Partnership whose role is to attract and support a range of enterprise across the region. Bristol Film Office, a division of Bristol City Council, offers a free service



Figure 28 *Flying Blind* (2013); © Ignition Films

to all productions planning to film in the city, acting as a one-stop-shop for all potential filmmakers through offering assistance throughout all stages of production, from initial location and crewing advice to reces and logistical support. The Bath Film Office, part of Bath & North East Somerset Council, offers a similar service for productions looking to film in Wiltshire, Somerset and South Gloucestershire.

In addition, two key national organisations for the creative industries, Creative England and Creative Skillset, also play an important role. Creative England, formed in 2011 following the closure of the UK Film Council, has offices in Birmingham and Salford as well as Bristol, and a remit to support businesses across the creative industries outside of London. Skillset is the Sector Skills Council for the creative industries. It provides skills advice and training to individuals and businesses, and carries out research on the needs of the sector, its workforce and employers.

A range of informal and co-working spaces also provide important knowledge exchange opportunities. These include cinema, gallery and studio venues such as Watershed (including the Pervasive Media Studio), Arnolfini, Spike Island, and the Engine Shed, a collaboration between Bristol City Council, the University of Bristol and the West of England Local Enterprise Partnership, which is near Temple Meads station and part of the Temple Quarter Enterprise Zone. These social and work spaces provide places to meet, network and build a creative community.

The region has several sixth form and further education colleges and four universities – Bath, Bath Spa, Bristol and UWE Bristol – within the West of England Local Enterprise Partnership zone, all of which have media courses at undergraduate and often at postgraduate level. These courses help to provide a constantly renewed ‘talent pipeline’ of skilled graduate labour. These educational providers engage in a range of projects, collaborations and partnerships with the film and television industries and is discussed further on the section on recruitment and training (pages 54–55).

Taken together, these institutions and organisations offer infrastructure, funding opportunities, training and education alongside networking support. They play a crucial role in fostering synergies and creating a sense of identity within the cluster.

# Freelance Workers in Bristol's Film and Television Industries

Freelance workers play a crucial role in Bristol's film and television industries. We estimate that freelancers comprise approximately 1,500 of our estimated total of 3,700 people employed in these industries. Freelance labour is notoriously difficult to track, partly because it is defined in a variety of ways. When asked to describe their current employment status, freelancers' responses were divided across a number of categories.

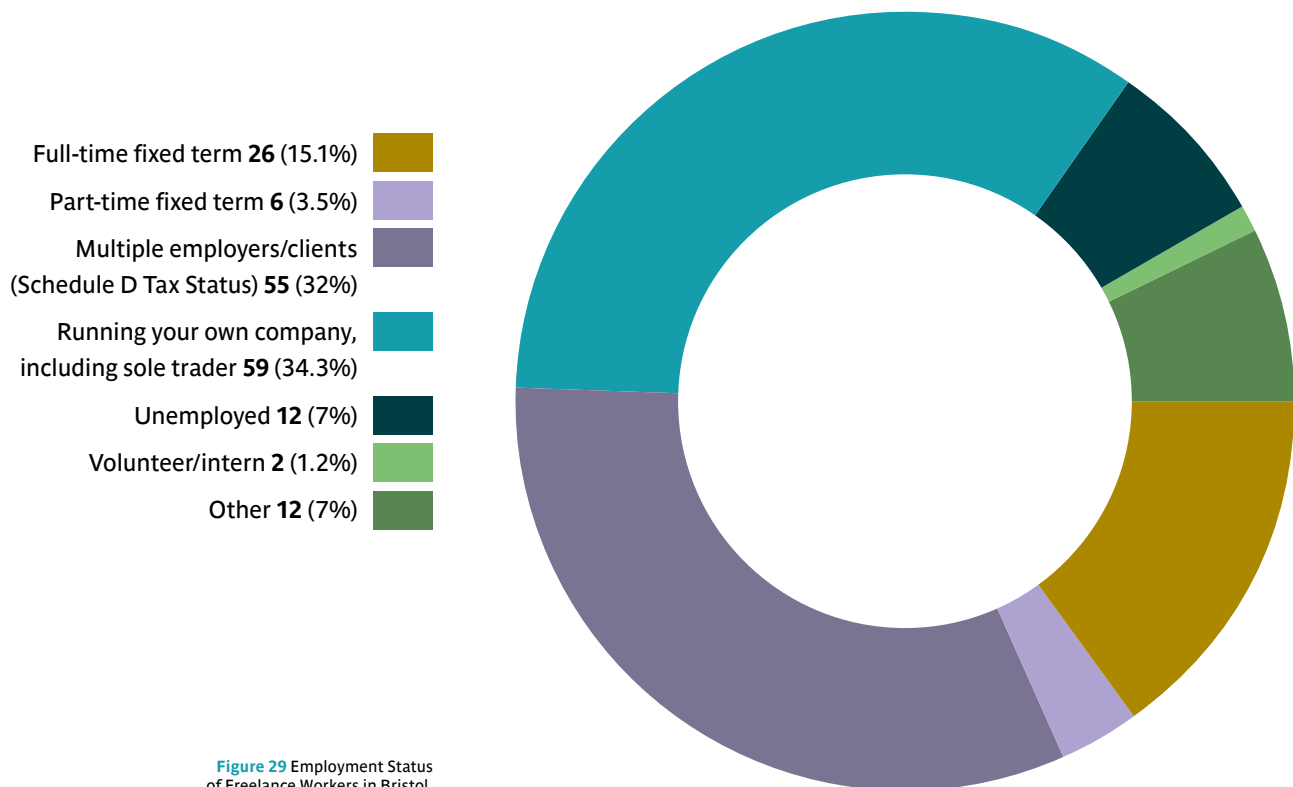
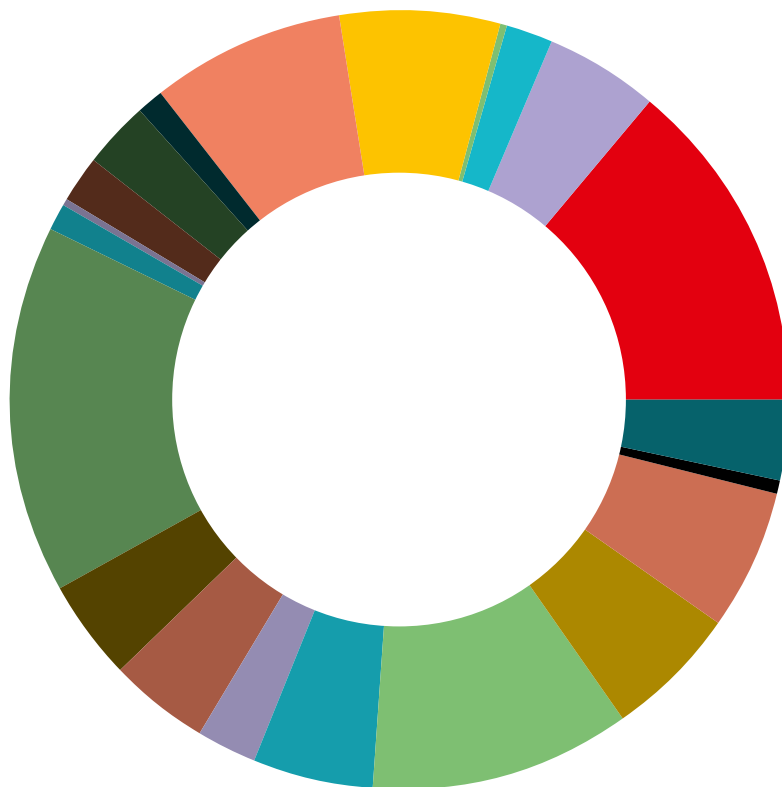


Figure 29 Employment Status of Freelance Workers in Bristol.

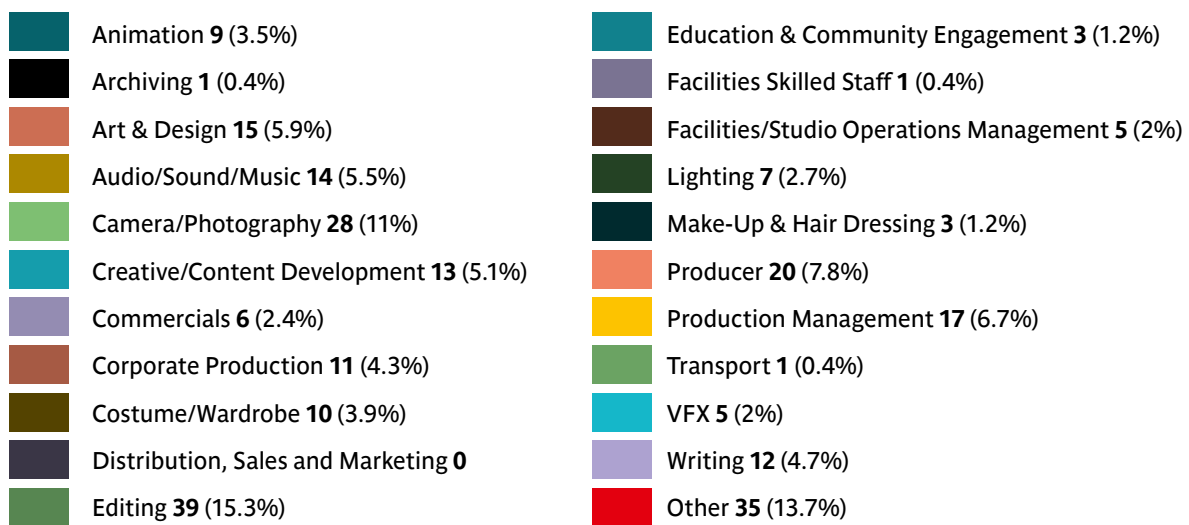
Although the majority of freelancers are sole traders or schedule D/portfolio workers, many are also employed on fixed term contracts; several respondents who selected 'other', described a multiplicity of different arrangements.



Freelancers work across a range of different sectors of the film and television industries as shown in Figure 30.

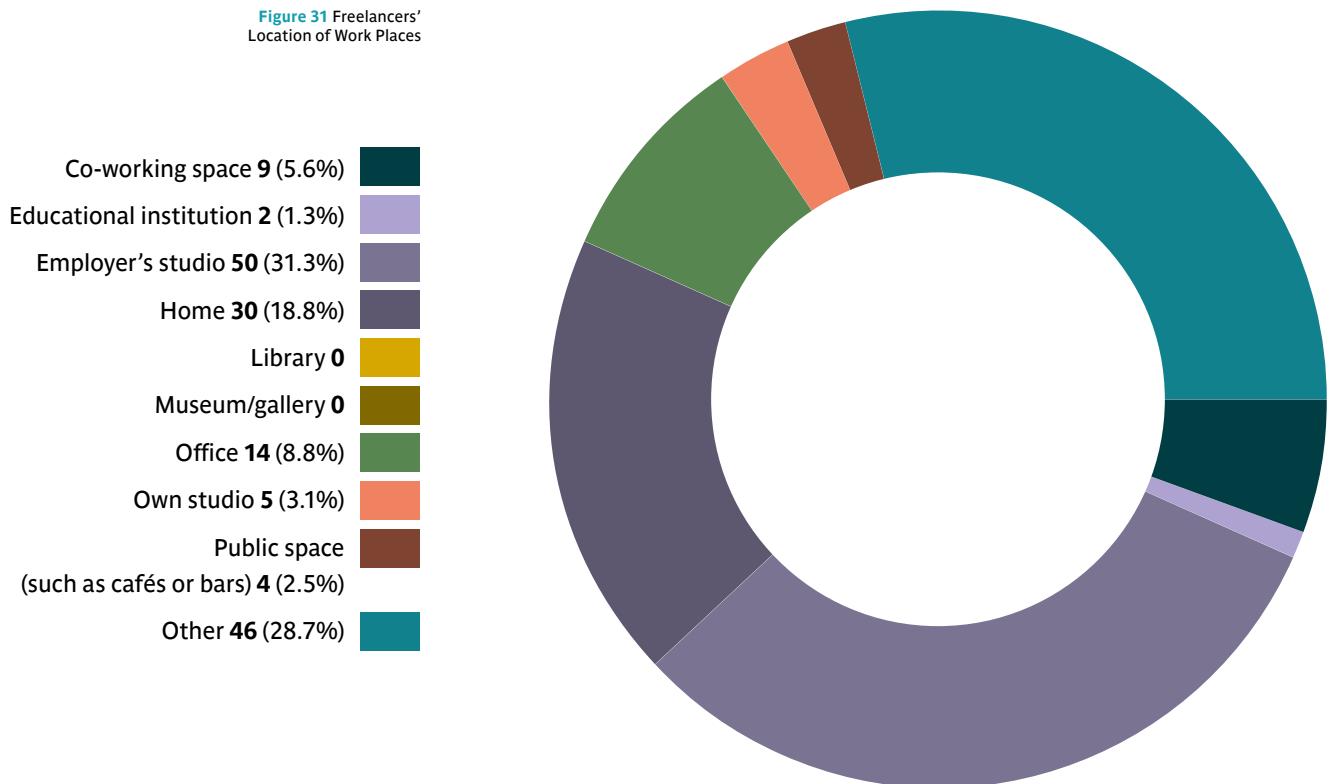


**Figure 30** Types of Work Carried Out by Film and Television Freelancers in Bristol. Several of those who selected 'other' identified a combination of options across a range of sections.



In addition we obtained some revealing data about where freelancers habitually worked, represented visually by Figure 31. The majority, unsurprisingly, worked on location or in the studio or workplace of their employer but a significant proportion work from home; only 3.1% freelancers had their own studio.

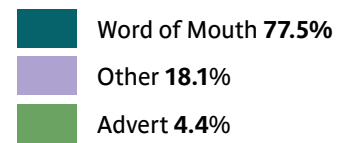
**Figure 31** Freelancers' Location of Work Places



When asked how they were recruited for the majority of projects on which they had worked in the past year, 77.5% said 'word of mouth'; only 4.4% replied they responded to an advertisement. Of the 18.1% that ticked 'other', these frequently involved some variation of word of mouth, such as contact via professional or social networking sites. Deregulated, informal hiring practices often leave unconscious biases unchecked and facilitate employers to recruit in their own image. Such recruitment practices can play a major role in perpetuating the lack of diversity in the workforce.



Figure 32 How Freelancers learn about job opportunities



## Diversity

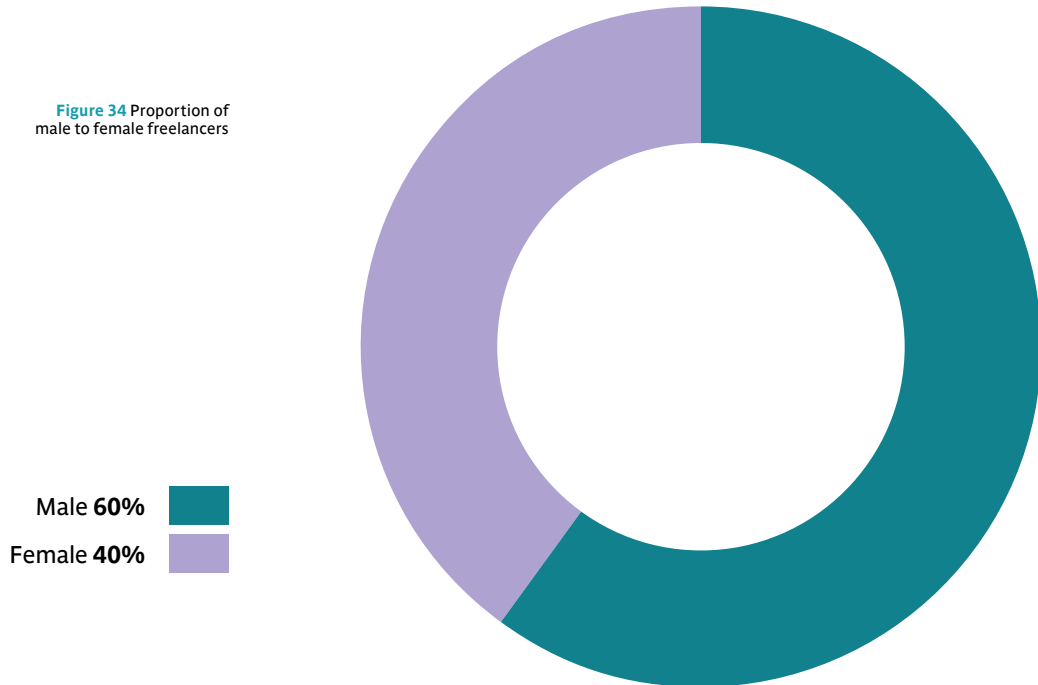
The film and television industries have been male-dominated traditionally. Our findings suggest that Bristol's independent companies show a fairly equal balance between male and female employees. However, our data did not allow us to calculate the proportions of those holding senior positions within the companies.



Figure 33 Proportion of male to female FTE company employees in Bristol's independent film and television companies

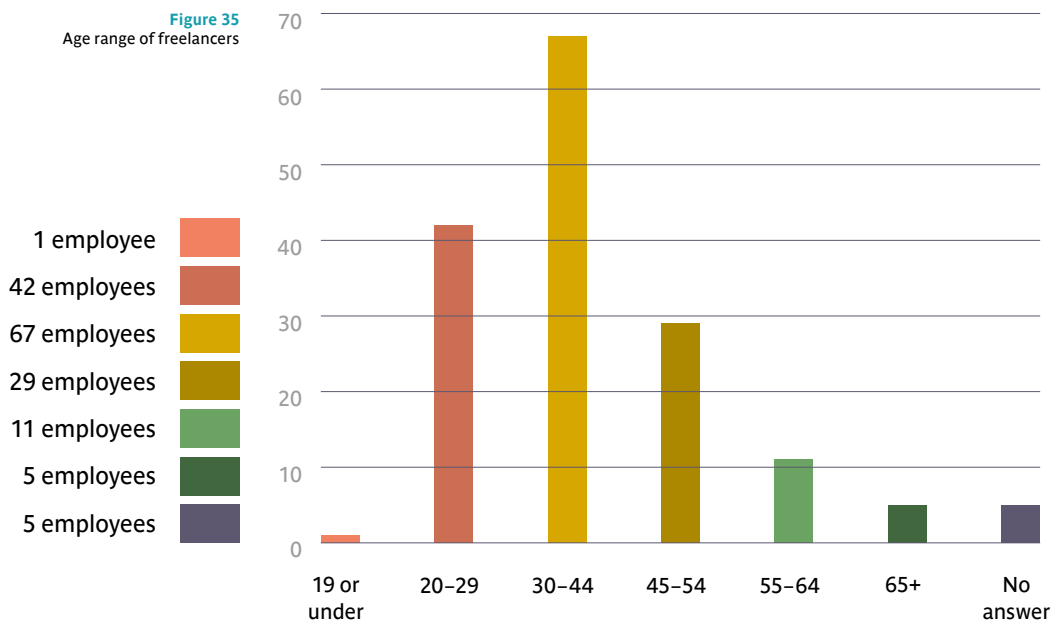


Figure 34 Proportion of male to female freelancers



The overwhelming majority of respondents to the freelancer survey were young: 70% were under 44. Only 7% were aged between 55 and 64 years old. These results tally with the national picture, in which the average age of freelance workforce is 39, with only 7% over 55.

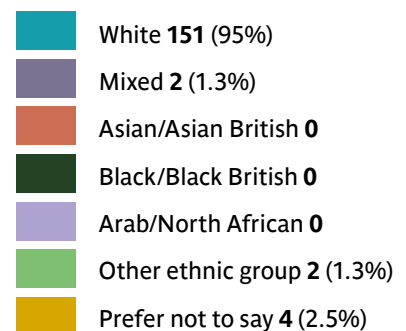
Figure 35 Age range of freelancers



The level of detail about employees provided by the company survey did not permit us to make any comments about nationality, disability, sexual orientation, ethnicity or class but we were able to obtain this information from our freelancer survey.<sup>20</sup> The returns show that 15 freelancers (10.7%) were from overseas countries, 13 from countries within Europe and two from outside Europe. 142 identified as British. 1.9% of freelance respondents identified as disabled. This 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.<sup>21</sup> 10.8% of our 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.



Figure 36 Ethnic breakdown of freelancers in Bristol's film and television industries



The overwhelming majority of freelancers identified as White; the proportion of Black and Minority Ethnic (BME) freelancers was 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%). Diversity in the creative industries has been subject to much scrutiny elsewhere.<sup>22</sup> Though we were unable to investigate this complex issue in any depth, it should be noted that social characteristics such as race and class often intersect and that the barriers to entry for marginalised social groups are interwoven and embedded within the short-term, project-based, freelance-dependent structures of film and television production.

# **Straight Shooting:** Opinions and ideas of those working in Bristol's film and television industries

# Working in Bristol

## Blissful Bristol

Data from our company survey (see page 24) showed that for a significant majority of companies (67%) over 90% of their workforce lived in the West of England LEP zone and so do not commute from other areas. Other questions in the survey were designed to elicit more qualitative responses so that we could probe the reasons both companies and freelancers had for locating in Bristol. This was also one of the key questions we asked our interviewees.

In a 2014 *Sunday Times* survey, Bristol was rated as the UK's best city in which to live.<sup>23</sup> Many of our respondents were very enthusiastic about living in the city, considering that Bristol had many advantages, physical – it's the 'right size' – architectural, geographical and cultural.

As a city to live in, [Bristol] is perfect. It's a beautiful city ... you can be in the middle of the city and you can be out of it in 10 minutes. I found London very claustrophobic and you can't get out of it. Bristol's got the communications to be able to get anywhere you want relatively quickly. You can go to London for the day. You can get to Heathrow in an hour and a half. It's close enough to stuff to make it work. It's just got a nice vibe. It's a friendly place. It's good. I mean I love it. It is a very attractive place.

One of our respondents also considered that Bristol was 'one of the best places to live in the country' but added that for him the major attraction was that 'there are a lot of really clever people here who are like-minded souls I think'. This sense of Bristol having a skilled, stimulating, creative and knowledgeable workforce came through strongly in many respondents' comments and demonstrated the importance of the city's intellectual and cultural life in attracting talent. This presence of a highly educated, smart labour force was considered to be crucially important to film and television companies, what one company leader described as Bristol's 'fantastic talent base'. Another eulogised a

culture of slightly helping each other but competing with each other at the same time – that Bristol is all on the same side ... This has always been the culture ever since I have been here: the idea that if somebody gets a good production everyone feels good about it, because they have pitched to London or somewhere and they have won something. Then there is a win-win for everyone because it supports everyone through their post-production network.

This sense of mutuality coupled with stimulating rivalry was widely shared and was, as noted in the general discussion of creative clusters, more important than any direct linkages between firms. One director opined: 'We probably couldn't survive without Films @59 being here and being able to be as successful as they are. But we rarely work with them.'

*If Bristol hadn't been what Bristol is, we wouldn't have set up here.*

*Why do we cooperate as an independent sector in Bristol? Because it is in our interests, so that we can attract really good people who are going to have a good career in Bristol but not necessarily with one company.*

In recognition of the importance of having a talented workforce to draw from, a number of companies described the active steps they took to share talent to ensure that it is retained in the region rather than be forced to seek work in London or elsewhere: 'It's really important, I think, to have a local production community. And companies support each other. If I've got somebody good I'll pass them on to somebody in Bristol who I think they could work for. There is no negative competition there at all.' Thus companies often make significant efforts to ensure that as much of their operations, including post-production, stays within the region and endeavour to recruit, where they can, from local talent and try to ensure that talented freelance staff are provided with sufficient work to be able to make a living within Bristol's creative community.

The vast majority of our staff is local. We really only very occasionally go to London to get anybody. And we actually insist on editing here ... we contract and expand by the project and then freelancers who work for us when we go, "There's nothing at the end of this thing," will say, "oh that's okay because the BBC has got something, Plimsoll has got something."

### **Regional cities and metropolitan snobbery**

However, despite its many advantages and attractions, Bristol is a medium-sized provincial city that lacks the opportunities provided by London, which has by far the largest concentration of film and television production in the UK. As one respondent commented: 'The pull of London is massive, because you can move from one job to another easily ... The opportunities to advance yourself quickly are much better.' Furthermore, many respondents were of the opinion that those who choose to work in Bristol are subject to metropolitan snobbery. Many companies felt that commissioning editors – always based in London and therefore hard to access – often assume that Bristol-based firms 'operate at a slower pace' and that the talent available is inevitably inferior.

The downside of Bristol is the suspicion in London that people go to Bristol because they don't want to work too hard, that it's a laidback city, it's a lifestyle choice ... "There's 24 people who know how to make great TV in this country, and they're all in London." That view is really, really strong. ... If you've worked your way up in the industry entirely in London, then you don't really understand the very different experience of working outside of London. You don't get it. You don't understand how it could possibly work. Why would anyone want to do that?



These assumptions sometimes take tangible form when London-based producers or directors are attached to commissions won by Bristol companies: ‘They would want one of their directors that they think has got more flair, to come down and add something to it, which is very annoying.’ Furthermore, as various responses to the Freelancer Survey pointed out, even if productions are shot in Bristol they are often edited in London or Manchester if commissioning editors have a preferred company or want to be near enough to see rushes or supervise post-production.

Figure 37 Watershed Cultural Cinema and Digital Creativity Centre on Bristol's Harbourside © Toby Farrow



## Infrastructure and organisation

In contrast to London, it is relatively easy to travel around Bristol and the proximity of the companies makes communication easy; the use of the same pubs, cafés, and restaurants or shared spaces such as Watershed Cultural Cinema affords opportunities to share knowledge and ideas. For example, one company leader commented: 'We're in the centre of Bristol and it hums and I've got access to everything.' In the opinion of one of our interviewees, the 'Clifton bubble' around the BBC was somewhat stifling and lacked a free-flowing exchange with the rest of Bristol's film and television community, but the often tight groupings of companies in sub-clusters was generally perceived as a major advantage facilitating a range of networking opportunities and 'untraded interdependencies'.

However, several respondents thought there needed to be improvements in Bristol's digital and transport infrastructure in the region. The complaints about the digital infrastructure were slightly puzzling in that Bath's business district has one of the fastest fibre optic networks in the UK and Bristol provides the widest availability of superfast broadband in the LEP zone – though only 12.8% of Bristol companies use it. This low level of take-up suggests, perhaps, that this issue may be more one of awareness than infrastructural problems per se.<sup>24</sup> A more serious issue, highlighted by numerous respondents, was Bristol and Bath's well-established transport problems. Traffic congestion, parking charges and restrictions, and the high cost and fragmentation of public transport remain a major problem for many companies and freelancers working in the city across all sectors of the regional economy. Many companies have businesses that are internationally orientated and part of their concern was the need to improve transportation links into and out of the region:

There is no train link from the airport to the main station in the middle of the city and Temple Meads isn't in the middle of the city either. So it doesn't feel like there is a centre that you are drawn into. If the airport links could be better into the centre of town there would be much more kind of flow and Bristol could be a much more international city.

An additional problem in the opinion of several respondents from microbusinesses and numerous freelancers who rented space was what they considered to be disproportionately high office rental costs in Bristol. This concern was often linked to a worry about Bristol's increasingly high rents and house prices, which rose faster than any other UK city in 2016.<sup>25</sup> Both these factors were thought to increase the difficulties of sustaining a profitable small business or a career as a freelancer in what are notoriously volatile and economically precarious industries.

## Scale and diversity in the production ecology

As our historical analysis showed, Bristol benefited significantly from the proliferation of small companies in the 1990s. In many ways Bristol's range and diversity of companies and sub-clusters is a very powerful testament to its longstanding tradition of enterprise and innovation and in natural history and animation, it is worth repeating, the city can claim to be globally significant. David Sproxton at Aardman considered that being in Bristol rather than London contributed to the company being perceived as slightly quirky, which added to its distinctiveness in the international marketplace.

However, Bristol faces a number of challenges because of its size and faces the persistent threat that it will shrink below the scale necessary to continue to be a viable location for companies or create sufficient job opportunities for freelancers. Although this threat exists for any regional production centre, Bristol was felt, by several freelancers, to lack diversity – 'Bristol is very natural history-centric' commented one respondent – and several considered the city's film and television industries difficult to break into, especially if you had moved to the region from elsewhere. A number of company respondents expressed concerns about larger companies moving to Bristol from London or Manchester in recent years, either relocating or (more typically) opening regional offices in the city. Although it was acknowledged that these companies bring jobs to the city and increase its profile, regional divisions of much larger, often multinational firms can also offer rates below those which are competitive for longstanding Bristol independents thereby undercutting existing firms. Bristol's success in attracting creative talent was perceived, by some, to have created an over-supply of labour in some sub-sectors as comments such as 'the business is getting harder' and 'money is increasingly difficult to come by' attest.

A particular challenge for Bristol, especially following the loss of HTV (see Appendix, pages 62–3) and the transfer of *Casualty* to Cardiff in 2011, was the lack of opportunities to make television drama and feature films. Although the success of *The Bottle Yard* in attracting productions was recognised, because these are made by companies based outside the region there were opportunities for technical crew and facilities but not for producers and directors which would be already attached to the production. Bristol currently has no indigenous television drama producers in the city and only two small independent film companies, Ignition Films and Hummingbird Films. As one of our interviewees said, 'Bristol is really a TV city, it's not a film city ... Being in Bristol is difficult for a fiction film-maker. If I was in London, it would be a lot easier ... Bristol needs a Kudos or RED Production ... because the commissioners only really want to deal with known and trusted partners.'

## Employment conditions and unions

As discussed above, Bristol's film and television companies often take very active steps to try to ensure that their freelance staff continue to be employed within the region through recommending staff to other firms in an effort to overcome the cyclical nature of work within these industries. However, the overwhelming perception among the freelancers who responded to our survey was that conditions of work in Bristol were deteriorating, which mirrors the findings of national studies.<sup>26</sup> Many felt their pay had remained static while costs had increased and several admitted to feeling 'severely squeezed now'. A significant number felt ground-down by the constant need to negotiate what they felt were fair rates for their work that were commensurate with their skills and experience. More troubling was the number of respondents who claimed that rates were intentionally fixed lower in Bristol than in London, 'up to 20% less' according to one respondent; some felt that companies 'actively keep rates down'. Comments citing stress caused by longer working hours were commonplace, as were reports of consequent health concerns including anxiety, sleeplessness and physical problems such as repetitive strain and Display Screen Equipment (DSE) injuries. Some respondents blamed 'cavalier' companies and 'overzealous production managers'. Others took a broader view, recognising that companies were working within the context of cuts to public service broadcasters resulting in shrinking budgets and shortened schedules:

I find working in the television industry unfulfilling mainly because schedules have become so ridiculously squeezed that televisual professionals at all levels and disciplines are propping-up production companies that are having to produce budgets which are unrealistically low in order to win commissions.

The concerns expressed by Bristol’s freelancers or those on short-term contracts, is shown by the following chart:

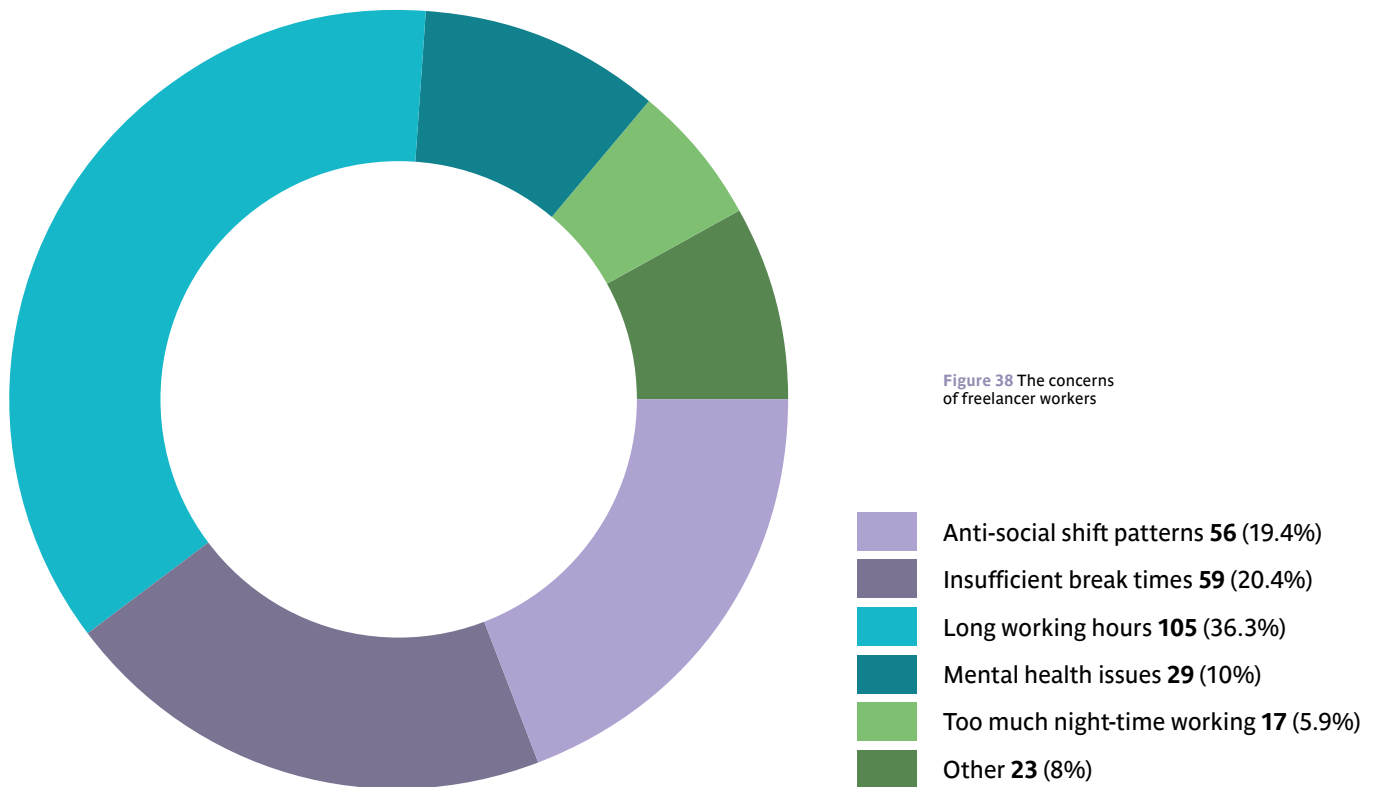


Figure 38 The concerns of freelancer workers

Our findings also replicate those of broader studies that show how the insecurity and often temporary nature of labour within the creative industries disproportionately affect women (as well as people from other disadvantaged social groups).<sup>27</sup> A number of intersecting factors contribute to this imbalance but, in the case of women, derives from the ‘automatic connection’ between women and childcare in which it is taken for granted that parenting is primarily women’s responsibility.<sup>28</sup>

One possible avenue to help address these issues and the wider problems faced by these industries – unionization and membership of professional associations – is particularly problematic within the film and television industries. 95 of the 160 freelancers who responded (59.4%) were not part of any union or professional association, though 9 respondents (5.6%) declined to answer. The reasons given for not joining such organisations included: ‘cost relative to gains’; ‘I don’t see the point’; and ‘not sure unions have any function for freelancers’. 26 of the 57 company respondents (45.6%) said their firm was not part of any industry organisation although 19 (33.3%) companies declined to answer this question. Furthermore, those companies and freelancers that are members of industry organisations are spread across a number of different national and local groups and networks, although most freelancers were members of BECTU (Broadcasting Entertainment Cinematograph & Theatre Union).<sup>29</sup>

This underrepresentation in either local or national organisations and the fragmentation created by diverse affiliations, was perceived by some respondents as preventing the industries’ ability to lobby policy makers both locally and nationally. Some companies argued that a new organisation was needed to enable the film and television cluster to ‘bring the Bristol industry together to speak as one voice’. However, others warned against creating a new organisation, arguing that the present fragmentation was already confusing enough. There was virtual unanimity from the respondents to both surveys about the need for greater publicity for their activities. There was a range of ideas about to how to achieve this. One company called for a weekly printed magazine – ‘a *Broadcast Bristol*’ – so that ‘communications were centralised’.

## Recruitment and training

The availability and quality of the talent available in the region is crucial to the film and television industries’ sustainability and recruitment and training is a vital part of this process. Our company survey revealed that 33 of the firms which responded (66%) had collaborated with universities, further education colleges or schools in a wide variety of ways. Aardman has forged strong links with the UWE Bristol, running masterclasses for its postgraduate animation students. It also runs the Aardman Academy, an annual twelve-week postgraduate training course in character animation delivered in collaboration with the National Film and Television School. The NHU and UWE Bristol have collaborated to set up a masters course in Wildlife Filmmaking and the MA Documentary Production has been co-designed by UWE staff and producers from the BBC’s documentary and factual unit. Companies that had established sustained relationships with educational institutions in the region described them as highly rewarding and enabled them to recruit high quality graduates and postgraduates.

There were also various issues and challenges. Some companies complained that graduates in the region were often not ‘work ready’ and harboured unrealistic expectations about the nature of entry-level roles within the film and television industries. Although many companies enjoyed good relationships with educational providers, for others such relationships were either non-existent or only occurred on an ‘ad-hoc’ basis. Others expressed a desire to work with educational providers but had been unable to establish these relationships so far; some companies considered themselves to be too small for such a relationship to be viable at present. All the companies which replied about this aspect of the industry agreed that forging good relationships with educational providers would help increase the labour pool, boost employment rates and help to address disparities in the availability and quality of talent in the region.

Figure 39 MA Wildlife Filming: a collaboration between the BBC and UWE Bristol; © UWE Bristol



# Conclusion

*To keep a healthy creative community in the city, it's got to have a certain scale. I don't think we really understand what the scale is in Bristol. That is crucial because there's a critical mass below which suddenly the freelancers and the contract people have to go to London.*

This Report has shown how the film and television industries in Bristol are the product of a local tradition of entrepreneurship, innovation and a gradual historical evolution. They have grown in significance primarily because of this culture of self-help and collaborative competition, accumulating the expertise and knowledge that sustains these creative industries rather than relying on outside interventions. We have shown the interweaving of economic, social and cultural factors comprise the complex ecosystem that congregates in and around Bristol. In what follows we present our specific findings and make eight recommendations that, if addressed, would, we believe, help to strengthen and develop this creative cluster.

## Our Findings

- 1** Based on the data gathered from our research, we estimate that Bristol's film and television cluster is composed of BBC Bristol, 131 private companies and a pool of freelancers who often work for several companies as well as the BBC. Our survey suggests that the majority – 64 out of the total of 97 private companies for which we were able to obtain data (58.2%) – are micro-enterprises and SMEs which turnover £500,000 or less. There is a wide diversity of companies but they form identifiable sub-clusters around six specialisms: natural history; animation; factual; post-production; corporate; and facilities. Natural history and animation remain the principal strengths of the cluster in terms of both turnover and jobs, though significant revenue is generated by factual firms in the cluster. The highest number of companies is in the corporate sub-cluster, though most of these are micro-enterprises. As video becomes the ubiquitous channel for digital communication, the definition of 'corporate' will expand significantly and mesh with the region's wider advertising and communications community.
- 2** Bristol's film and television cluster is economically significant. In 2015/16, the aggregate turnover of independent companies in the region alone was £140.3m. A further £17.7m was inward investment generated by companies from outside the region that chose to use its locations and/or facilities at The Bottle Yard Studios. Overall, commercial film and television production generated £158m for the local economy. The BBC makes a further significant contribution, but the corporation does not provide regional figures for its spending so its contribution cannot be quantified. We estimate that the sector employs around 3,700 people: 1,000 work at BBC Bristol, 1,200 in independent companies and a further 1,500 are freelancers.
- 3** Our research revealed that film and television companies also contribute significantly to Bristol's cultural health and commercial diversity. Our research showed that the presence of a range of interconnected companies in a creative



cluster stimulates the flow and exchange of ideas, new knowledge and technological innovation. The global reach and success of, in particular, its natural history and animation companies, afford Bristol an international profile. The culture of the cluster itself can be described as competitive but also mutually supportive. Companies take active steps to recommend and share freelancers in order to ensure that talent remains within the region.

- 4 The history and evolution of Bristol's film and television industries have profoundly shaped its present configuration. The presence and subsequent demise of HTV as a major production centre had a significant effect on the region. Because of the continued importance of the BBC as its 'creative anchor', the cluster remains vulnerable to shifts in the corporation's strategic direction such as the decision to relocate *Casualty* to Cardiff in 2011 in order to boost drama production in Wales.
- 5 Although Bristol's film and television industries have major strengths in natural history and animation deriving from its history, that concentration means that some freelancers perceive the cluster as lacking diversity. In particular the absence of a regional television drama production company is considered by many to constitute a significant weakness. Feature film-making is also very under-represented with only occasional low-budget productions, with the significant exception of Aardman's animated features. Although The Bottle Yard has been successful in attracting drama productions to Bristol, so far these have been made by companies based outside the region.
- 6 Bristol's attractiveness as a place to live and its affordability relative to London contributes significantly to the decisions of companies to locate in the region. However, the principal reason is the skills, talent and expertise of the available workforce and its cultural vibrancy. This success generates its own pressures, often related to increasing competition. Rising house prices and the cost of living and of renting office space create further difficulties for freelancers and microbusinesses in particular.
- 7 The film and television sector in Bristol also faces significant challenges about its lack of diversity. Representation of black and minority ethnic groups, disabled people and people from working class backgrounds is below the national average. Although freelance staff are 'exchanged' between companies in order to increase the opportunities for sustained work, their survey responses reveal a range of issues about conditions of work, pay and morale that mirror the national picture in the film and television industries.
- 8 Media organisations and educational providers play a significant role in the region's cultural ecology. The local media organisations such as the Royal Television Society West, Bristol Media, the Bath and Bristol film offices and Watershed Cultural Cinema provide a range of services that help support and develop film and television activity in the region, celebrate its achievements and increase its profile. This is enhanced by the work of national organisations, Creative England and Creative Skillset. There is a range of collaborations between companies and educational providers, which serve to enhance the availability of talented recruits to the industry. This is most strongly evident in several partnerships at postgraduate level between companies and UWE Bristol.

*Okay, we've got a big industry. These are the disadvantages. These are the advantages. How do we build on those? What's the investment that's needed? Can we make a justifiable case for that investment?*

# Recommendations

- 1** A summit should be convened in order to address the issues raised in this report and how to tackle them. We recommend that this summit should consist of film and television executives, freelancers, educators, policy makers and facilitators in the Bristol region, including Bristol City Council, together with representatives from national media organisations.
- 2** Reliable and up-to-date data about regional production spend in the film and television industries both in Bristol and in other UK regions should be provided by the British Film Institute and Ofcom in collaboration with the Local Enterprise Partnerships. We would specifically urge the BBC to provide a breakdown of its regional spending and employment figures. This would help to enhance the visibility and importance of regional film and television production in the UK.
- 3** Initiatives that would help increase the profile and visibility of the region's film and television industries should be supported. For example, a bid for Bristol to become a UNESCO City of Film would celebrate the city's rich film heritage and the extraordinary talent of those who work here.
- 4** The provision of affordable office space should be addressed by Bristol City Council and other agencies in order to help microbusinesses in this sector to get established and encourage freelancers to work in the city.
- 5** The Bottle Yard Studios should continue to be supported in order to attract more production into the region, especially drama production. Interested parties should work together to explore the possibilities of supporting more feature film-making and television drama production in the region in order to broaden the production base. One possibility would be to create, or re-create, the equivalent of the initial iFeatures scheme for low-budget feature film production whose remit was to 'capture the essence of Bristol – its values, culture and energy'.
- 6** A compelling argument should be articulated for the importance of having a national commissioner for factual programming based in Bristol. This would boost production and help create a richer and more diverse production ecology.
- 7** To help address the lack of diversity in the industry and overcome the fragmentation of affiliations, there is a clear need for greater connectivity and collaboration between different sectors and the creation of more pipelines for talent development.
- 8** An important conduit for this development would be collaborations between the industry and educational providers that are already operating but which are uneven. Companies and educational providers need to work more closely together supported by local and national agencies. Such collaborations and partnerships should be developed in order to support the aspirations of students and trainees and recognise the needs of the industry.

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# Appendix: A longer history

## a) The Origins and Growth of the BBC's Natural History Unit

The origins of the Natural History Unit date from the immediate post-war period when Desmond Hawkins, a keen amateur ornithologist, was appointed a features producer at BBC West in Bristol with a remit to develop natural history output.<sup>30</sup> Hawkins began making radio programmes – including *The Naturalist* (1946) and *Birds in Britain* (1951) – from the BBC's studios on Whiteladies Road. Television programming started in May 1953 with an outside broadcast from renowned naturalist and broadcaster Peter Scott's Wildfowl Trust ornithological research station at Slimbridge. Scott presented the long-running series, *Look* (1955–69), which demonstrated the potential for natural history programmes at peak viewing times.<sup>31</sup> Its success fuelled Bristol's growing reputation as a national centre for wildlife filmmaking that resulted in the formation of the NHU in April 1957.

Over time the NHU expanded its output, producing programmes that gradually increased in scale and ambition. Notable was *The World About Us* (1967–84), which showcased the NHU's talents in an extended 50-minute format. In December 1979, to coincide with the release of *Life on Earth*, the NHU was given department status and re-organised on a more commercial basis so that its most prestigious programmes could be sold abroad. With additional staff and more generous budgets, the NHU embarked on a series of high profile 'landmarks' featuring or narrated by David Attenborough including *The Living Planet* (1984), *The Trials of Life* (1990) and *Planet Earth* (2006) through to the current offering, *Planet Earth 2* (2016). These extremely expensive 'blue chip' programmes are now co-produced with American companies such as Discovery (though the BBC always retains editorial control and maintains strict standards of authenticity) and are marketed internationally by BBC Worldwide under the brand BBC Earth. They exist alongside more modestly budgeted programmes such as *Springwatch* (2005–) for domestic audiences and an extensive online presence. The NHU is now the world's largest wildlife production unit and, together with the cluster of companies creating natural history programmes that have grown up around it, has earned Bristol the title of the 'Green Hollywood'.

## b) HTV: Bristol's Lost 'Creative Anchor'

'I think the real loss to Bristol as a diverse production centre was when HTV went, because HTV was big and made a lot of good films and documentaries. They were an alternative to the BBC ... another place where you could go and work, where you didn't have to be making 26 films about antiques or cooking or whatever. You could be making a proper, serious programme because HTV then was a proper serious company. That was a real loss to the Bristol television scene.'

For roughly twenty years, from the early 1970s until the early 1990s, film and television production in Bristol benefited from the presence of a second public service broadcaster in the city: Harlech Television (HTV). When commercial broadcasting was introduced in 1950s, it was conceived as an interlocking set of strong, autonomous and distinctive regional broadcasters to counteract the London-centricity of the BBC that had been criticised in the Beveridge Report (1951).<sup>31</sup> Companies awarded an ITV franchise were responsible for providing programming for their specific region, which would encourage diversity and a local voice in programming content and stimulate the growth of regional economies and cultures. Although this laudable dream was undermined by the development of a cartel of the 'Big Four' companies – ABC, Associated-Rediffusion, ATV and Granada – which made the overwhelming majority of nationally networked programmes, the other ITV regional broadcasters were all important in stimulating regional television production.

Television Wales and West (TWW), which was awarded the regional franchise in October 1956 and started broadcasting on 14 January 1958, was one of the smaller regional companies. Because the siting of its transmitter meant that TWW covered both South-West England and South Wales, it had studio facilities in both Pontcanna in Cardiff and Bath Road in Bristol. In January 1964, TWW took over Teledu Cymru, the company that had held the franchise for West Wales. When the franchises were reallocated in 1967, TWW lost out to Harlech Television (named after its chairman Lord Harlech), which became HTV in 1970. HTV, which had purchased TWW's facilities in Bristol and Cardiff, became two virtually autonomous halves (HTV Wales and HTV West) when a second transmitter was built in 1970, each with its own board and local programming.

HTV West was a substantial presence in Bristol, developing a reputation for its factual programming but also producing several successful children's series that sold well internationally including *Children of the Stones* (1977) and *Robin of Sherwood* (1984–86), and the detective series *Wycliffe* (1994–98). Although HTV retained its franchise in the 1992 auctioning round, the company experienced considerable financial difficulties during this period and made substantial staff cuts in 1993. It became vulnerable because of the 1990 Broadcast Act that relaxed rules on franchise ownership and permitted mergers between the major companies for the first time. HTV was taken over by United News in 1997. In 2000 its broadcast licence was sold to Carlton and its production facilities to Granada. In 2004 Granada merged with Carlton to create a single ITV company whose focus was London not the regions. Regional production was cut to the minimum level of local news and features required to satisfy its commercial public service license and thus the founding principle of regional autonomy and diversity on which independent television had been built was almost entirely undone.

HTV's Bath Road studios still houses ITV West regional news but the building itself was sold to Cube Real Estate, a property developer, in 2010. The loss of an ITV production base has been a substantial blow to the health and size of Bristol's television industries.

### c) Aardman Animations

The origins of Aardman Animations lie in the occasional short animated pieces made by school friends Peter Lord and David Sproxton during their university holidays for *Vision On* (1964–76), a BBC series for deaf children that was produced in Bristol. They founded Aardman in 1976 as an attempt to convert a hobby into gainful employment, and located in Bristol in order to ‘tag on to the apron strings of the BBC’, as Sproxton describes it. They also had personal connections with Bristol which made the risk seem worth taking rather than try to locate in London. Aardman continued to make programmes for BBC children’s television including *The Adventures of Morph* (1981) evolving its instantly recognisable style through the use of stop-motion animation and the haptic qualities of Plasticine or modelling clay (Claymation), which gives Aardman its distinctively hand-made look. During the 1980s, Aardman made more ambitious programmes such as the Wallace & Gromit half hour programme *The Wrong Trousers* made by Nick Park and commissioned by Peter Salmon at BBC Bristol and the *Lip Sync* series (1989) commissioned by Channel 4 that was broadcast for an adult audience. One of the *Lip Sync* series, Park’s *Creature Comforts*, triggered the interest of advertisers and making commercials has become a major source of revenue. This enabled

Figure 40 Aardman’s Headquarters on Bristol’s Dockside; Courtesy of David Sproxton





Aardman to develop its ambitions to make feature films, secured through a deal with the American animator DreamWorks, which resulted in *Chicken Run* (2000). Further films followed including *Wallace and Gromit: The Curse of the WereRabbit* (2005) and two made in partnership with Sony: *Arthur Christmas* (2011) and *The Pirates! In an Adventure with Scientists!* (2012). Through a partnership with the European giant StudioCanal that began in 2013, Aardman has made *Shaun the Sheep: The Movie* (2015) based on the successful television series and has plans to make a sequel as well as a separate production, *Early Man*.

The global success of Aardman's characters – Morph, Wallace & Gromit and Shaun the Sheep – has enabled the company to expand to its present scale that encompasses five separate divisions – feature films; series, specials and shorts; advertising; apps, games and interactive; rights, branding and development. In addition to merchandising its characters through apps, video games, syndicated cartoon strips, toys, books, stationery, figurines and accessories, the company has developed Disneyesque entertainments including the Wallace & Gromit 'experience' in Blackpool and Shaun the Sheep Land at Skånes Durrpark in Sweden. It is growing its advertising work through a partnership with the New York-based animation company Nathan Love that began in September 2015 and has expanded into significant online production through over thirty digital partnerships, including LoveFilm and iTunes, on a revenue-sharing basis. Aardman continues to experiment, using a YouTube Channel – Aardman's Darkside – as its platform for 'more leftfield work' and has recently developed its first original story, 'Special Delivery', for Google's ATAP (Advanced Technology and Projects) Spotlight Stories, which provides a 360 degree VR platform with some interactivity.

# Endnotes

- 1 See Harvey and Robins (1993); Goldsmiths (2015), chapter 9, pp. 114–27.
- 2 Data from the Office for National Statistics and its Official Labour Market Statistics service, Nomis, is based on the Standard Industrial Classification (SIC) code system, which classifies business establishments and other standard units by the type of economic activity in which they are engaged. However, SIC codes capture only those firms which are PAYE and VAT registered (firms that turnover £83,000 or more). Many micro enterprises and self-employed people – a significant proportion of those working in the creative industries – are thus excluded from the data. Furthermore, analyses of the two key datasets for industry analysis – the Business Register and Employment Survey (BRES), the official source of employee and employment estimates, and UK Business Counts, an annual count of UK businesses drawn from Companies House and HM Revenue – yield results which our research has shown to be highly questionable for the Bristol region.

For example, a search of the BRES dataset using the SIC codes for film and television production – 59111-59140, 60200 and 78101, and not including SICs for projection activities (59140), and music publishing (59200) – suggests that only 1,065 people are employed in Bristol city. Our research has shown that almost that many people are employed at BBC Bristol alone. A search of the UK Business Counts dataset for Enterprises (which counts multiple sites owned by one business as a single unit, unlike the Local Units dataset), suggests that there are 390 business units in Bristol, of which 135 are engaged in ‘motion picture production’ (clearly defined as theatrical feature films on the SIC Code support website). However, our research has shown that there are just a handful – certainly less than ten – companies working in feature film production in Bristol. Similarly, the UK Business Counts dataset suggests 60 firms are engaged in post-production activities, but our research has shown that Bristol has only five post-production companies. The figures for UK Business Counts in the West of England LEP are even higher, with 190 companies included under motion picture production and 85 under post-production. Although the number of television production companies given in this data set is closer to our findings – 155 in Bristol and 230 in the LEP – we consider the overall figure of 390 to be significantly inflated. These datasets are used extensively by government and other public and private sector bodies for industry analysis, monitoring and planning purposes. Identifying disparities in the data and establishing more accurate figures is therefore essential if they are to be used to develop robust and evidence-based policies.

Employment figures derived from the BRES dataset using SIC codes for film and television production:

Industry	Bristol, City of	West of England LEP
59111: Motion picture production activities	400	500
59112: Video production activities	50	75
59113: Television programme production activities	400	450
59120: Motion picture, video and television programme post-production activities	200	225
59131: Motion picture distribution activities	0	5
59132: Video distribution activities	0	0
59133: Television programme distribution activities	0	5
60200: Television programming and broadcasting activities	15	30
78101: Motion picture, television and other theatrical casting	0	0
<b>Total</b>	<b>1,065</b>	<b>1,290</b>

Business counts derived from the UK Business Count (Enterprise) dataset using SIC codes for film and television production:

Industry	Bristol, City of	West of England LEP
59111: Motion picture production activities	135	190
59112: Video production activities	30	55
59113: Television programme production activities	155	230
59120: Motion picture, video and television programme post-production activities	60	85
59131: Motion picture distribution activities	0	5
59132: Video distribution activities	0	0
59133: Television programme distribution activities	0	0
60200: Television programming and broadcasting activities	10	20
78101: Motion picture, television and other theatrical casting	0	0
<b>Total</b>	<b>390</b>	<b>585</b>

- 3 Bristol and Bath by Design (2016), *Final Report*, (November); [http://www.bristolbathdesign.org/wp-content/uploads/2016/05/BBxD\\_FinalReport\\_.pdf](http://www.bristolbathdesign.org/wp-content/uploads/2016/05/BBxD_FinalReport_.pdf).
- 4 BFI *Statistical Yearbook 2016*, p. 204. <http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-statistical-yearbook-2016.pdf>.
- 5 Ofcom (2015), *Review of the Operation of the Television Production Sector*, [http://stakeholders.ofcom.org.uk/binaries/broadcast/reviews-investigations/tv-production-sector-review/TV\\_Production\\_Sector\\_Review.pdf](http://stakeholders.ofcom.org.uk/binaries/broadcast/reviews-investigations/tv-production-sector-review/TV_Production_Sector_Review.pdf); for an overview see Presence (2017).
- 6 The UK's definition of the creative industries is 'those industries that are based on individual creativity, skill and talent with the potential to create wealth and jobs through developing intellectual property'. It includes thirteen sectors: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure software (i.e. video games), music, the performing arts, publishing, software, and television and radio.
- 7 See Bassett et. al. (2001 and 2002); Boddy (2004); Griffiths et. al. (1999); Tallon (2006).
- 8 There is no universal standard survey response rate. However, Survey Monkey, one of the leading online survey providers in the world, claim an average response rate for online surveys of 24% <http://fluidsurveys.com/university/response-rate-statistics-online-surveys-aiming/>.
- 9 This dates from the publication of the *Creative Industries Mapping Document* in 1998 and *Industrial Clusters in the UK* (2001). For important subsequent publications see Bibliography.
- 10 Chapain et. al. (2010).
- 11 See Boddy (2004).
- 12 See Scott (2000).
- 13 See Boddy (2004).
- 14 Mark Sweeney, 'BBC Confirms *Casualty* will move from Bristol to Cardiff', *Guardian*, 26 March 2009; <https://www.theguardian.com/media/2009/mar/26/bbc-casualty-move-to-cardiff-from-bristol>).
- 15 <http://www.bbc.co.uk/news/uk-england-bristol-34484063>.
- 16 It is worth noting that filming days and the number of productions do not always correlate with inward investment figures. This is because of the different kinds of productions that work in the city (mini-series with large budgets can have fewer filming days than medium-budget sitcoms, for example).
- 17 Quoted in Bassett et. al. (2002), p. 173.
- 18 <http://www.bristolpost.co.uk/we-re-backing-bristol-bristol-s-career-opportunities/story-29585493-detail/story.html>.

- 19 Digital Production Partnership (2016), *New Content Creators*, p. 4. Available at <https://www.digitalproductionpartnership.co.uk/what-we-do/guides-reports/survey-reports/new-content-creators/>.
- 20 In line with the Creative Industries Federation, we recognise the social model of disability in which it is understood that there is no sensible dichotomy between able and disabled and that it is the social environment which normally ‘disables’ a person (i.e.: makes it impossible for them to perform to their ability). For example: lack of wheelchair access is often what makes it impossible for an individual in a wheelchair to work in an organisation rather than the work itself being incompatible with their impairment. In the government’s 2010–2015 policy paper on equality they suggested that one way of protecting the rights of disabled people was “encouraging the use of social model of disability which says that disability is created by barriers in society”.
- 21 All national data is taken from Creative Skillset’s *Employment Census of the Creative Media Industries* (2012) and *Workforce Survey* (2014).
- 22 R. Comunian, A. Faggian and S. Jewell (2011), ‘Winning and losing in the creative industries: an analysis of creative graduates’ career opportunities across creative disciplines’, *Cultural Trends*, 20: 3–4, pp. 291–308; Helen Blair (2001) “‘You’re Only as Good as Your Last Job’: the Labour Process and Labour Market in the British Film Industry’, *Work, Employment and Society*, 15: 1, pp. 149–169; Kate Oakley (2013), ‘Absentee workers: representation and participation in the cultural industries’, in M. Banks, R. Gill and S. Taylor (eds) *Theorizing Cultural Work: Labour, Continuity and Change in the Cultural Industries*, London: Routledge, pp. 56–67.
- 23 Alexandra Goss, ‘We want to be part of it’, *Sunday Times*, 23 March 2014; [http://www.thesundaytimes.co.uk/sto/style/homes\\_and\\_gardens/best\\_places/article1390298.ece](http://www.thesundaytimes.co.uk/sto/style/homes_and_gardens/best_places/article1390298.ece).
- 24 See ‘Economic Baseline no. 5: Place’, *Economic Note*, p. 1; <http://www.westofenglandlep.co.uk/about-us/economic-intelligence/economic-baseline>; see <http://www.thedrum.com/knowledge-bank/2014/06/12/bristol-bath-calling> (for the Bath claim).
- 25 See <https://www.hometrack.com/uk/insight/uk-cities-house-price-index/>. UK Cities House Price Index (2016).
- 26 Jack Newsinger, and Steve Presence, ‘Public Funding for Film in the UK: The Corporate Welfare System and its Discontents’, in Paul Murschetz, Roland Teichmann and Matthias Karmasin (eds), *Public Funding for Film: Challenges, Purposes and International Cases*, Berlin: Springer-Verlag (forthcoming 2017).
- 27 Leung Wing-Fai, Rosalind Gill and Keith Randle, ‘Getting in, Getting on, Getting out? Women as career scramblers in the UK film and television industries’, *The Sociological Review*, 63: S1 (2015), pp. 50–65, here p. 59. As the authors argue, ‘we must remain attentive to the question of why parenting does not negatively impact on men’s careers in film and television in the way it does on women’s – and guard against this becoming an unquestioned assumption, because it is precisely in the realm of taken-for-grantedness that sexism becomes indivisible and naturalized (p. 59).
- 28 Organisations to which companies are affiliated include: BAFTA, Creative England, and Pact (Producers Alliance for Cinema and Television) as well as to a number of local networks, including Bristol Media (the most common), Business West, Creative Bath, the Natural History Network and the Royal Television Society West (RTS West). Organisations mentioned by freelancers include: the Bristol Editors Network (BEN), Equity (the union for professional performers and creative practitioners), the Guild of British Camera Technicians (GBCT), the Production Managers Association (PMA) and the Writers Guild of Great Britain (WGGB).
- 29 Parsons (1982), p. 362.
- 30 Ibid., p. 55.
- 31 Briggs (1995), p. 352.

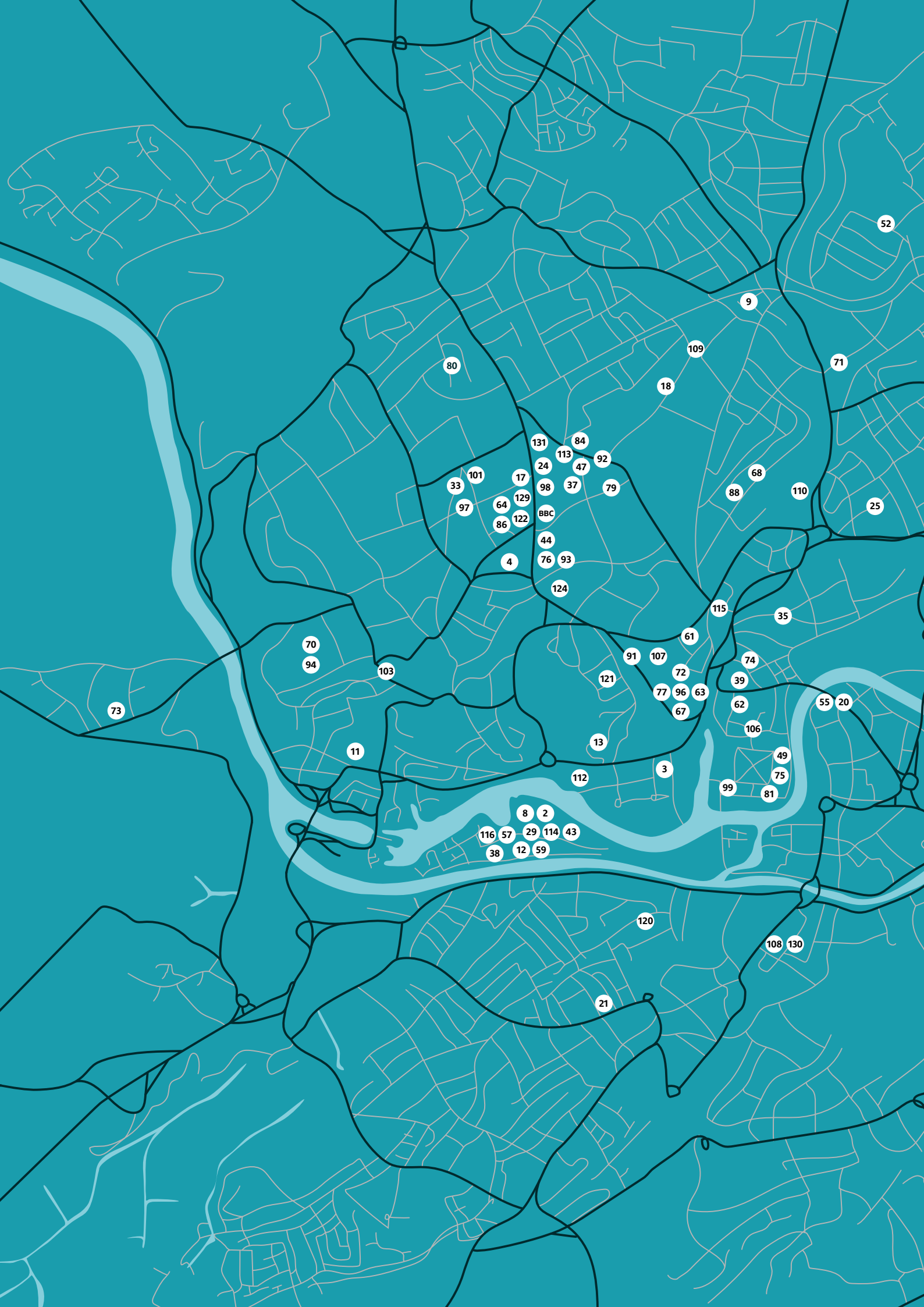
# Bristol Film and TV Sub-Clusters

The following 131 companies represent the entirety of the independent sector in Bristol, colour-coded according to the kind of activity that best characterises their work. Each category comprises a sub-cluster of companies except drama, which consists of just two micro enterprises, Hummingbird and Ignition Films.

## KEY

-  Natural History
-  Animation
-  Factual
-  Post-Production
-  Corporate
-  Facilities
-  Drama

- |  |  |  |
|--|--|--|
| <b>1</b> 180 Film Services                       | <b>44</b> Evolutions                   | <b>88</b> Mentor Digital                     |
| <b>2</b> 365 The World                           | <b>45</b> Eyelights                    | <b>89</b> Moving Art                         |
| <b>3</b> 422 South                               | <b>46</b> Film Tank                    | <b>90</b> NewStage Consortium                |
| <b>4</b> Aglow Films                             | <b>47</b> Films@59                     | <b>91</b> NymbL                              |
| <b>5</b> Airhead                                 | <b>48</b> Flat Earth Scenery & Staging | <b>92</b> Oblong Films                       |
| <b>6</b> A JEM Productions                       | <b>49</b> Floating Harbour Films       | <b>93</b> Off the Fence Productions          |
| <b>7</b> A Productions                           | <b>50</b> Four Four Media              | <b>94</b> Olaus Roe                          |
| <b>8</b> Aardman Animations                      | <b>51</b> Four Four Productions        | <b>95</b> Omni Productions                   |
| <b>9</b> Amalgam Modelmaking                     | <b>52</b> Free Spirit Films            | <b>96</b> Perceptive Films                   |
| <b>10</b> Ammonite                               | <b>53</b> Gallus Film and Media        | <b>97</b> Pixillion                          |
| <b>11</b> Aqua Vita Films                        | <b>54</b> Giggle Group Media           | <b>98</b> Plimsoll Productions               |
| <b>12</b> Arthur Cox                             | <b>55</b> Gingenious                   | <b>99</b> Preconstruct                       |
| <b>13</b> Aspect Film and Video                  | <b>56</b> Goanna Films                 | <b>100</b> RPrecision Cargo Services         |
| <b>14</b> axisVFX                                | <b>57</b> Green Ginger                 | <b>101</b> Quickfire Media                   |
| <b>15</b> Bailey Balloons                        | <b>58</b> Grip Services                | <b>102</b> Radium Audio                      |
| <b>16</b> Band Films                             | <b>59</b> Grit Bristol Photographic    | <b>103</b> RDF Television (West)             |
| <b>17</b> BDH                                    | <b>60</b> Hanover Pictures             | <b>104</b> Remarkable                        |
| <b>18</b> Beeston Media                          | <b>61</b> Happy Hour Productions       | <b>105</b> Reybridge Films                   |
| <b>19</b> Bells and Two Tones<br>Fire and Rescue | <b>62</b> Hello Charlie                | <b>106</b> Rubber Republic                   |
| <b>20</b> BF&M                                   | <b>63</b> Housecat Productions         | <b>107</b> Rumpus Animation                  |
| <b>21</b> Blacklight Productions                 | <b>64</b> Humble Bee Films             | <b>108</b> SceneQ Studios                    |
| <b>22</b> Blaze Productions                      | <b>65</b> Hummingbird Films            | <b>109</b> Scenewerx Ltd                     |
| <b>23</b> The Bottle Yard Studios                | <b>66</b> Hurricane Media UK           | <b>110</b> Scubaboy                          |
| <b>24</b> Brian Leith Productions                | <b>67</b> Icon Films                   | <b>111</b> Set Smith Ltd                     |
| <b>25</b> Brightworks Media                      | <b>68</b> Ignition Films               | <b>112</b> Shadow Industries                 |
| <b>26</b> Bristol Costume Services               | <b>69</b> Illuminarium SFX             | <b>113</b> Silverback Films                  |
| <b>27</b> Bristol Film Studios                   | <b>70</b> Inimitable                   | <b>114</b> Skylark Media Group               |
| <b>28</b> BTFS                                   | <b>71</b> Interval Films               | <b>115</b> Snowline Productions              |
| <b>29</b> Calling the Shots                      | <b>72</b> Jelly Television             | <b>116</b> Spike Film and Video              |
| <b>30</b> Chieftain Film Services                | <b>73</b> John Downer Productions      | <b>117</b> Studio Cars Bristol               |
| <b>31</b> Clockwise Media                        | <b>74</b> John Wright Modelmaking      | <b>118</b> Suited and Booted                 |
| <b>32</b> Codsteaks                              | <b>75</b> JonesMillbank                | <b>119</b> Sun and Moon Studios              |
| <b>33</b> Coffee and TV                          | <b>76</b> Keo West                     | <b>120</b> Swift Films                       |
| <b>34</b> Complete Video Services                | <b>77</b> Kiss My Pixel                | <b>121</b> Testimony                         |
| <b>35</b> Day One Media Limited                  | <b>78</b> Knowle West Media Centre     | <b>122</b> The Farm Group                    |
| <b>36</b> DNA                                    | <b>79</b> Level Films                  | <b>123</b> The White Balance Imaging         |
| <b>37</b> Doghouse Post Production               | <b>80</b> Lloyd And Rose Buck          | <b>124</b> Tigress Productions               |
| <b>38</b> Doubleshot                             | <b>81</b> Lobster Pictures             | <b>125</b> TR Film & TB Scaffolding Services |
| <b>39</b> Dragon Fire Films                      | <b>82</b> Location Assist              | <b>126</b> Video Europe                      |
| <b>40</b> Drèsd                                  | <b>83</b> Location One                 | <b>127</b> Visual Impact                     |
| <b>41</b> Drummer TV                             | <b>84</b> Love Productions             | <b>128</b> VMI.TV Limited                    |
| <b>42</b> E Murphy Designs                       | <b>85</b> Made Television              | <b>129</b> Warehouse 51 Productions          |
| <b>43</b> Episode Three                          | <b>86</b> Magic Films                  | <b>130</b> Wonky Limited                     |
|  | <b>87</b> Mendip Media                 | <b>131</b> Wounded Buffalo                   |



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**Outside map area**

5	6	15	22	26	30
34	41	45	46	50	51
56	60	65	69	85	87
89	104	105	118	127	

**The Bottle Yard Studios**

1	14	19	23	40	42
58	78	82	83	90	100
102	111	117	125	126	

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