UWE Bristol
University of the West of England

Go West! 2

Bristol's Film and Television Industries

Andrew Spicer, Steve Presence and Agata Frymus

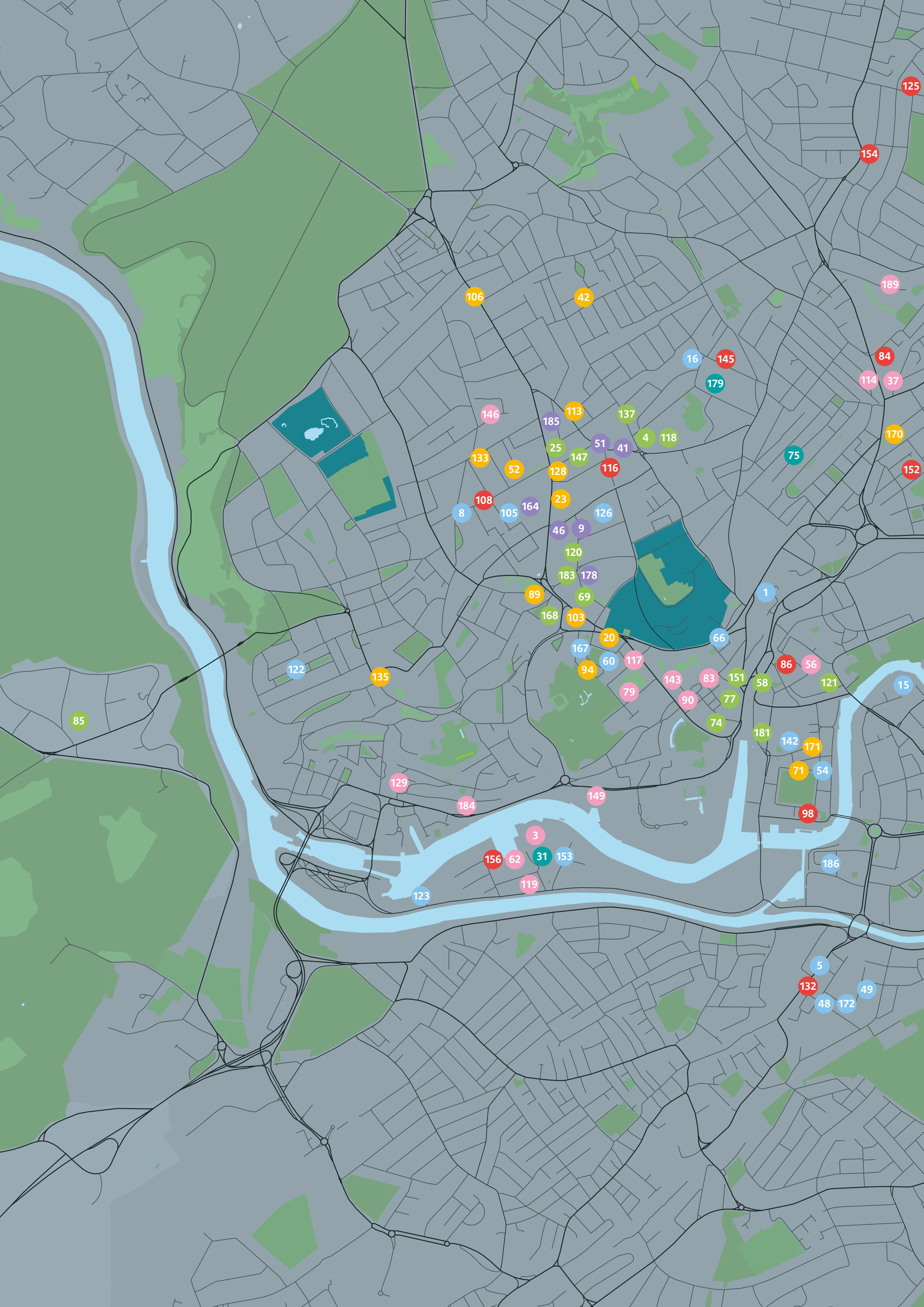
Bristol's independent production sector

The following 189 companies represent the entirety of the independent production sector in Bristol, colour-coded according to the kind of activity that best characterises their work.

KEY

- Facilities
- Branded Content
- Animation
- Factual
- Natural History
- Post-Production
- Drama

1 422 South
2 A Productions
3 Aardman Animations
4 AGB Films
5 Aglow Films
6 Amalgam Modelmaking
7 Arresting Features
8 Aspect Film and Video
9 Audio Uproar
10 Axis Studios
11 AxisVFX
12 Bailey Balloons
13 BAM Associates
14 Band Studios
15 BDH
16 Beeston Media
17 Bells and Two Tones Fire and Rescue
18 Black Bark Films
19 Blacklight Productions
20 Blak Wave Productions
21 Blaze Productions
22 Blue Sky Film and Media
23 Bone Soup
24 Boomsatsuma Creative
25 Brian Leith Productions
26 Brightworks Media
27 Bristol Costume Services
28 Bristol Television and Film Services (BTFS)
29 Briz Kidz Casting
30 Buckloop
31 Calling the Shots
32 CAMERA, motion capture innovation studio
33 Chew Valley Construction
34 CineWest Ltd (formerly Video Europe SW)
35 Clockwise Media
36 Cod Steaks
37 Creative Connection Animation Studio
38 CueBox
39 Daisy Media
40 Destination Film
41 Doghouse Post Production
42 Drummer TV
43 E. Murphy Designs
44 Early Day Films
45 Eco Shoots
46 Evolutions
47 Eyelights
48 Eyes Up Films
49 Fable Studios
50 Figure Nine
51 Films@59
52 Five Mile Films
53 Flat Earth Scenery & Staging
54 Floating Harbour Films
55 Flying Camera Company
56 ForMed Films
57 Free Spirit Films
58 Freeborne Media
59 Funko Animation Studios
60 Gate Films
61 Giggle Group Media
62 Green Ginger
63 Grip Services
64 Group of Seven
65 Gutsy Animations UK
66 Happy Hour Productions
67 Hello Charlie
68 Housecat Productions
69 Humble Bee Films
70 Hummingbird Films
71 Hungry Gap
72 Hurricane Media UK
73 Huxley Studios
74 Icon Films
75 Ignition Films
76 Illuminarium SFX
77 Impact Wild
78 Indefinite Films
79 Infocandy Animations UK
80 Innov8 Films
81 Interval Films
82 Island Monkey
83 Jelly Television
84 Jo Sarsby Management
85 John Downer Productions
86 John Wright Modelmaking
87 JonesMillbank
88 Jooka Film & Video Production
89 KEO West
90 Kiss My Pixel
91 Korro Films
92 Kube Productions
93 Lacuna Productions
94 Level Films
95 Life Media UK
96 Lloyd And Rose Buck
97 Loaf
98 Lobster Pictures
99 Location One
100 Location Safety Ltd
101 Longtail Films
102 Loop Streaming and Productions
103 Love Productions
104 Luminosity
105 Magic Films
106 Mallison Sadler
107 Mendip Media
108 Moonraker VFX
109 Mother Goose Films
110 Motion Impossible
111 MRU Services
112 MTFX
113 Mustang Films
114 MW Motion
115 NineTeenTwenty
116 Nulight Studios
117 Nymbl
118 Oak Island Film
119 Ocula Motion Graphics & Digital Animation
120 Off the Fence Productions
121 Offspring Films
122 Olaus Roe
123 Omni Productions
124 One Tribe TV
125 Orchid Video Transcription
126 Owl VR
127 Phoenix Casting
128 Plimsoll Productions
129 Primary Visual Effects
130 Proper Job Films
131 Props Ink
132 Qu Studios
133 Quickfire Media
134 Radium Audio
135 RDF Television (West)
136 Re-Scene
137 Rebel Television & Media
138 Reel Soul Movies
139 Relevant Films
140 Reuben + Jamie
141 Robert Plant Hire
142 Rubber Republic
143 Rumpus Animation
144 Sapphire Media
145 Scenewerx Ltd
146 Scubaboy
147 Seadog TV & Film Productions
148 Set Smith Ltd
149 Shadow Industries
150 Shy Guys Studios
151 Silverback Films
152 Skyhook Media
153 Skylark Media Group
154 South West Artist
155 Spark Films
156 Spike Island Exhibitions Services
157 Stirling Pictures
158 Studio Cars Bristol
159 Suited and Booted
160 Sun and Moon Studios
161 Team Video
162 Testimony Films
163 The Bottle Yard Studios
164 The Farm Group
165 The Makeup Kit
166 TR Film & TB Scaffolding Services
167 Troy TV
168 True to Nature
169 Tusko Films Ltd
170 Under the Wing Productions
171 Uplands Television
172 Vanilla Bear Films
173 Vero
174 Vistaworx
175 Visual Impact (VI Rental)
176 VMI.TV Limited
177 Walk Tall Media
178 We Are Audio
179 Whitby Davison Productions
180 Wild Rice Films
181 Wild Space Productions
182 Wildseed Studios
183 Wildstar Films
184 Wonky Limited
185 Wounded Buffalo Sound Studios
186 Woven
187 Yatta
188 Zanshin Films
189 Zubr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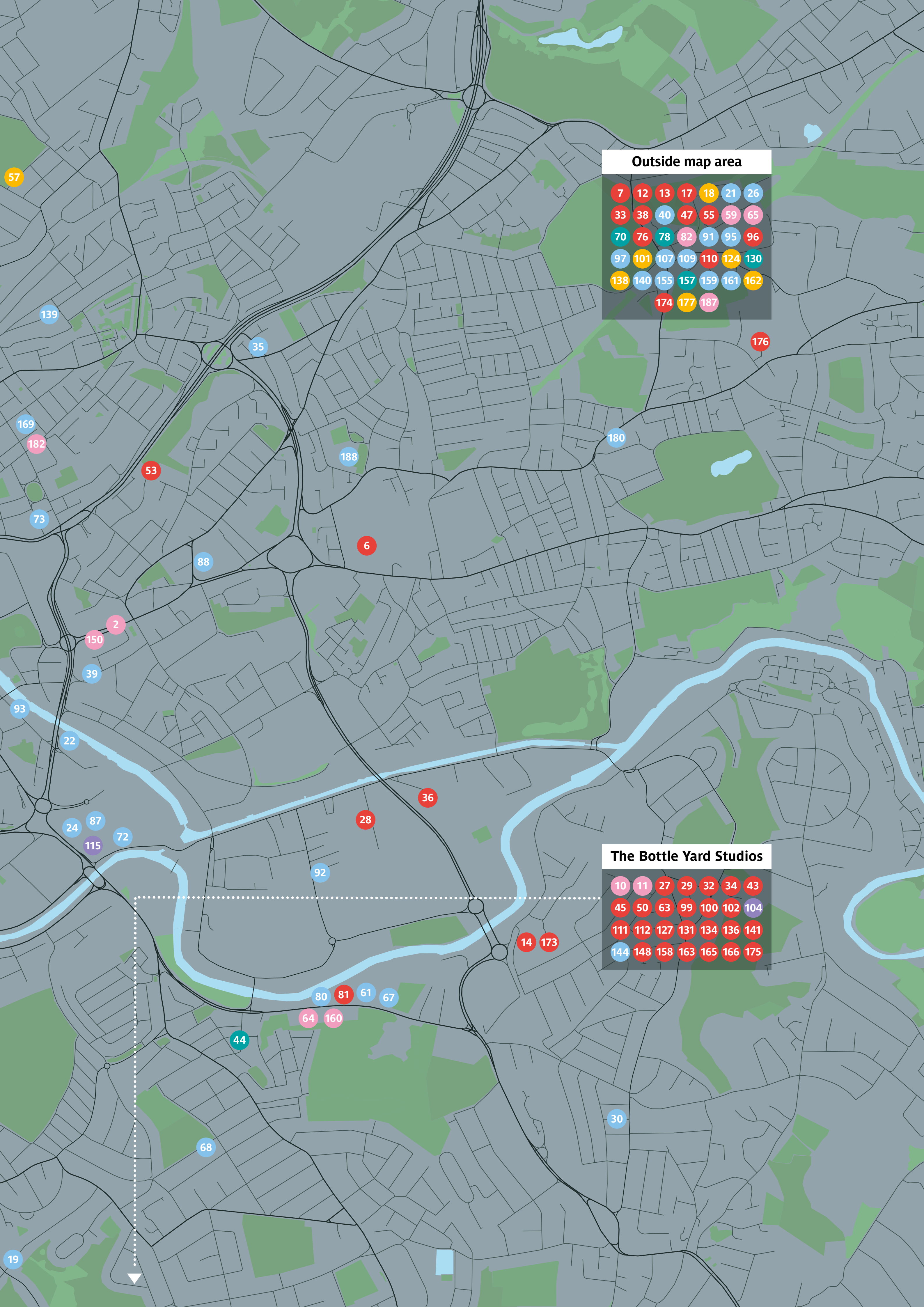
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**Andrew Spicer, Steve Presence
and Agata Frymus**

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Executive summary

Research aims and objectives

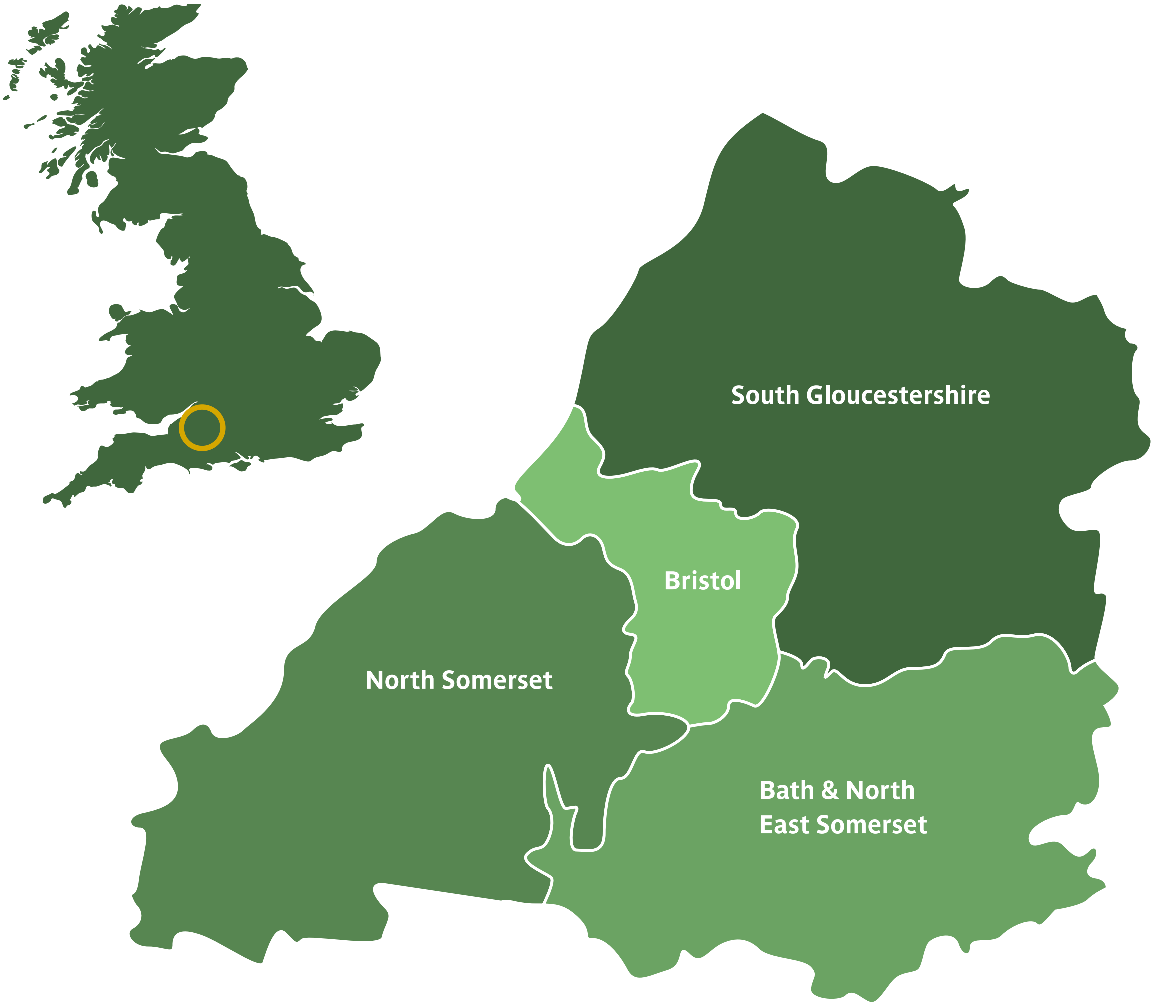
The purpose of this research is to investigate and analyse the changes that have occurred in Bristol's film and television production sector since our 2017 report, *Go West! Bristol's Film and Television Industries*. For this revised and expanded edition of that initial report, we have once more sought to provide detailed and up-to-date information about the size, shape and characteristics of the region's production sector – information that is unavailable elsewhere. By generating this data and analysing the changes that have occurred between 2016 (when the research for the first report was undertaken) and 2021, we demonstrate how the sector has evolved in response to these significant cultural, economic and political shifts, and evaluate the current significance of the screen industries to this region.

Research design

Using the 131 companies in the dataset from our 2016 report as a starting point, we conducted an extensive search of the companies operating in the region – which we define by the boundaries of the West of England Local Enterprise Partnership Zone – that together comprise its production sector. This includes all production companies working in the four major genres – animation, factual, natural history and branded content – plus those in an emergent drama sub-sector. Also included are post-production companies and the range of firms that provide support services, which we have described as the 'facilities' sub-sector (equipment hire companies, studios, transportation services, SFX and VFX companies, makeup and costume services and so on).

To ensure our analysis was as comprehensive as possible, we also interviewed a number of the major companies and worked with key organisations and institutions in the sector – including the BBC and Channel 4, Bristol Film Office, the Bottle Yard Studios, the Royal Television Society and the Watershed, Bristol's leading independent cinema and home of the BFI's Film Hub South West. We also drew on trade journals such as *Broadcast*, *Screen Daily, Screen International* and *Televisual*, and cross-referenced our findings with data held by Companies House and the websites and online profiles of all the companies we identified. As before, we have mapped the locations of all the companies in the region and published these in the map at the back of the report.

In addition to the company count, we have generated new figures on the aggregate turnover of companies and the number of Full-Time Equivalent workers they employ overall, as well as breakdowns of company counts, turnover and employment in each sub-sector. Working with data provided by Bristol Film Office, we also calculate the overall economic value of the industries to the region. Almost sixty per cent of our data on turnover and employment was provided directly by the companies themselves. The remaining data was calculated using estimates based on the publicly available figures released by the companies in that sector, their number of employees and the date they began trading.



For our 2017 report, we conducted surveys of both production companies and freelancers. Our colleague Amy Genders has since published a detailed investigation of Bristol's freelance community – *An Invisible Army: The Role of Freelance Labour in Bristol's Film and Television Industries* (2019) – which includes a list of recommendations to address the challenges that community faces. For this edition, our focus is thus exclusively on production companies, but we wish to emphasise that the freelance community is essential to Bristol's future as a centre of screen production. Finally, as in our previous report, this study does not include Bristol's videogames sector (though some production companies, such as Aardman, also work in this field). However, video games constitute a growing sector in the region and the UK is now the leading video game market in Europe. As videogames is also now included in the BFI's definition of the screen sector, our aim is to include videogames in subsequent editions.

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

Findings

1 Bristol's film and television cluster currently consists of 189 independent production companies and BBC Studios (the Bristol element of which comprises the NHU and the Bristol team of Studios' Factual Entertainment Productions). There is a very wide range of companies in the sector, but the vast majority are micro-enterprises or SMEs. There are six established sub-sectors of companies – animation, branded content, facilities firms (including studios), factual, natural history, and post-production – as well as an emergent sector of indigenous drama companies. The long-established specialisms in natural history and animation remain the region's principal strengths in terms of genre of production, but the extensive infrastructure provided by the many facilities companies is a key asset to the region.

2 The region's film and television industries are economically significant and experiencing very rapid growth. The independent sector (not including BBC Studios) generated £197.5m in turnover in 2020/21.[1] This is up £57.2m from the £140.3m generated by the 131 independent companies in 2017 (a growth rate of 40.8 per cent). BBC Studios now operates as an independent entity. In the absence of published figures, our estimates suggest that BBC Studios contributes almost one third, bringing the combined turnover for Bristol's independent sector to £288m (a growth rate of some 105 per cent). This growth looks set to continue as the UK overall experiences a production boom driven by the post-lockdown production restart and increased demand for new content. The Bottle Yard Studios is expanding accordingly, with three new stages in development.

3 The impact of COVID-19 was experienced differently across the region's screen industries. Animation was able to transition to remote working with relatively minimal disruption, yet the travel ban had a severe impact on the natural history sector because so much of its work depends on large teams working overseas. However, most of the production sub-sector reported that the financial impact of the pandemic was one of delay rather than decline. In this respect, given that the scripted genre was hit hardest by covid, the region's predominantly non-fiction orientation appears to have mitigated the pandemic's impact on production companies. Instead, freelancers and the exhibition sector experienced harsher economic consequences.

4 Film and television companies continue to contribute significantly to the region's cultural health, civic community and international profile. This contribution has been enhanced since 2016, particularly through Bristol's designation as a UNESCO City of Film in October 2017 and the arrival of Channel 4 in January 2020. This revised report suggests that co-locating in a cluster continues to stimulate the flow and exchange of ideas, new knowledge and technological innovation; the exchange of freelancers also helps maintain adequate levels of employment to ensure that talent remains in the region.

5 The history and evolution of Bristol's film and television industries have shaped its present configuration in profound ways, notably the growth of the BBC's Natural History Unit and Aardman Animations. The cluster suffered significantly from the loss of HTV but is starting to benefit from the arrival of Channel 4. Channel 4's move out of London is a sign that some of the major regional inequalities in the UK and the concentration of media in the capital are being addressed, but Bristol still lacks a powerful political voice at a national level.

6 Although Bristol's film and television production sector has major strengths in natural history and animation, deriving from its history, the cluster was perceived by some freelancers to lack variety. The absence of a major regional television drama production company was a significant weakness noted in our 2017 report. However, this is starting to change and a small but growing group of new drama producers is now operating in the region. Feature filmmaking, with the significant exception of Aardman's animated features, remains significantly under-represented. The Bottle Yard Studios has been highly successful in attracting high-end television drama productions to Bristol, but so far these have been made by companies based outside the region.

7 Bristol's attractiveness as a place to live and its relative affordability compared to London contributes significantly to the decisions of companies to locate in the region. However, the principal reason remains

the infrastructure, skills, talent and expertise of the workforce and the city's diverse cultural offering. Nevertheless, Bristol's success generates its own pressures, especially the increasingly high cost of housing and office space, and there is intense competition in some sub-sectors.

8 Bristol remains a city of stark social and cultural inequalities and its film and television industries face significant challenges regarding the diversity of its workforce (something that mirrors the national picture). However, while much work remains to be done, these disparities do seem to be better recognised now than in 2017 and efforts are underway to address them in several quarters. More work is needed to evaluate the effectiveness of diversity schemes in the region.

9 Media organisations and educational providers continue to play a significant role in the region's cultural ecology. They help to connect, support and celebrate the work of companies in the cluster and provide a 'talent pipeline' which sustains it. However, more work needs to be done to enhance connectivity among the different specialisms and the sector as a whole.

10 There is an increasing consciousness about environmental concerns and sustainability within the region's screen companies and organisations. This is reflected in in various freelancer and company initiatives and practices to reduce the industry's carbon footprint.

Figure 2 Christopher Walken in *The Outlaws* (2021) © BBC – Amazon Studios – Big Talk – Four Eyes

Recommendations

It is pleasing that two of our recommendations from the previous report – a bid to become a UNESCO City of Film and the presence of a national broadcast commissioner in Bristol – have come to pass. We are also delighted that Bristol City Council continues to support The Bottle Yard Studios and that the facility is expanding, but we have some particular recommendations (no. 4) that we feel would enhance its offer. Implementing the following seven recommendations would, in our view, materially enhance the strength and visibility of Bristol as a regional screen powerhouse.

1 A screen sector summit should be convened by Bristol City Council, under the City of Film banner, to address the issues raised in this report and how best to tackle them. Such a summit should take place bi-annually and consist of executives from the production and exhibition sectors as well as freelancers, educators, policy makers and facilitators in the region, 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 the South West and in other UK nations and regions, should be provided by the British Film Institute and Ofcom. We also recommend that the BBC and Channel 4 provide a breakdown of regional spending and employment figures. Provision of accurate data, including about freelancers, would help to enhance the profile and importance of regional film and television production and call attention to disparities.

3 The provision of affordable office space should be addressed by Bristol City Council and other agencies in order to help enable microbusinesses in this sector to get established and to support freelancers to work in the city. High streets have been particularly hard hit by the pandemic and we note the recent £4.7m ‘Love Our High Streets’ initiative, funded by WECA and Bristol City Council, includes a plan to support creative spaces in the city centre. The region’s screen industries should seek to participate in this scheme.

4 Policy makers should explore ways of supporting more indigenous film and television drama production in the region. The development of a direct financial incentive – akin to the Yorkshire Content Fund or the Liverpool City Region Production Fund, both of which provide up to £500,000 per project – would be a major boost to the region. The Bottle Yard Studios should also be supported to encourage more home-grown scripted production. Another possibility would be to create, or re-create, the equivalent of the iFeatures scheme for low-budget feature film production, whose remit was to ‘capture the essence of Bristol – its values, culture and energy’.

5 In order to address the lack of diversity, particularly class and ethnic 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. A number of schemes are in operation and these need to be monitored and evaluated in order to ascertain where more support and funding needs to be provided.

6 Our findings suggest that a degree of informal co-operation and cross-collaboration exists between the historically separate screen sectors in Bristol and Cardiff. We recommend the formation of a working group to investigate how this could be enhanced and strengthened.

7 Given the seriousness of the threat posed by the climate crisis, the sustainability of the region’s screen sector must be the number-one priority for practitioners and policymakers. Bristol has an opportunity to take a leading role in developing sustainable initiatives with regards to both the carbon footprint of the industry and the health and wellbeing of its workforce. We suggest how to address this issue should be a principal theme of the proposed Screen Sector Summit.

Introduction

Bristol is home to the largest independent film and television production sector outside London.[2] Yet beyond the national beacons of the BBC's Natural History Unity (NHU) and Aardman Animations, Bristol's film and television industries have a tendency to be overlooked by those outside the sector. As a result, relatively little is known about the evolution or contemporary characteristics of these industries, or about their significant cultural and economic contribution to the region.

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.

For this updated edition, we have once more sought to provide detailed and up-to-date information about the size, shape and characteristics of the region's film and television production sector. We discuss the historical evolution of the screen industries in the region, without which their present-day configuration cannot be properly understood, and analyse the major cultural, political and economic changes that have occurred since our first report and explore how these have affected the sector, from the creation of BBC Studios and the arrival of Channel 4 to the impact of Brexit and COVID-19. This report also includes an expanded section on Bristol's natural history sector, the 'Green Hollywood', as the most economically significant genre produced in region and one undergoing some significant changes.

We also explore in detail the various opportunities and challenges that the production sector faces in the region, and the particular qualities, advantages and disadvantages that derive from Bristol as a geographical but also a political location. While there are several economic advantages for the industries in the region, 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 London as the dominant centre of the UK's screen industries, the 'small nations' (Northern Ireland, Scotland and Wales) and the English regions.[3] As one of our interviewees 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 based on the talents, innovation and enterprise of its labour force and a culture of DiY, self-help entrepreneurialism rather than from any large-scale external investment. Indeed, we argue that Channel 4's choice of Bristol as one of its 'creative hubs' was based on these strengths. After presenting our findings in detail, the report concludes with a series of recommendations, based on the evidence we have assembled, about what policy interventions might help to strengthen the film and television industries in the region (see also p. 8).

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.

The two editions of *Go West!* as well as our own and our colleagues' research on the region's screen industries complement both a major survey of the design industry in Bristol and Bath and a study of the Bristol-Bath creative cluster, and thus contribute to a broader picture of the region's cultural industries overall.[4] The report is also intended to contribute to an enhanced understanding of the UK's wider film and television industries, especially the importance of regional centres which play a vital role in the UK's screen sector but which are often overshadowed by London's dominance. Several of our interviewees for the original report observed that, because of the volatility of the screen industries, Bristol's cluster would likely look very different in even five years' time. This follow-up study therefore focuses on how these industries have evolved over the five-year period between the two reports (2016–21) and how the cluster has responded to the enormous economic, social and cultural changes that have occurred – from the formation of BBC Studios and the arrival of Channel 4 to Brexit and the COVID-19 pandemic. As longitudinal studies of the media and creative industries are extremely rare, this is a valuable opportunity to explore how and why these changes occur and with what effect. In what follows, we outline our methodology and discuss why our reports use the concept of a 'creative cluster' in order to understand how these industries work.

Figure 3 The Bottle Yard Studios in Whitchurch © Bottle Yard Studios

Methodology

In the 2017 report, we identified 131 independent production companies active in the 'Bristol region' as defined by the West of England Local Enterprise Partnership zone – an area that now constitutes the West of England Combined Authority (WECA). Using these companies as a starting point for a new dataset, we conducted an extensive search and review process of the current independent sector in the region, identifying fifty new companies and removing a handful of those that have since ceased trading. For each of the 189 companies in the final dataset, we compiled information on the nature of their work, positioning them in one of the seven sub-sectors that constitute the region's production sector, and collected data on their location in the city, their annual turnover and the number of their Full-Time Equivalent (FTE) employees. We did this initially by analysing each company's online profile and then by approaching the company directly, via email and phone calls. Pleasingly, almost sixty per cent of the data in our dataset was provided by the companies themselves. The remaining data was calculated using the open-source data-mining and visualisation software, Orange, with estimates based on the publicly available data provided by the companies in that sector, their number of their employees and the date they began trading. Though these estimates inevitably introduce a margin of error into the dataset, when tested against those companies for which we had actual data, the estimates were reassuringly accurate.

To enrich our analysis and understanding of the sector, we also conducted twenty-five semi-structured interviews with a range of stakeholders in the sector, including several company directors, commissioners from the BBC and Channel 4 and a range of stakeholders from sector support organisations in the city, such as Bristol Film Office and the Royal Television Society. Throughout the research process, we cross-referenced our analysis with publicly available data held by Companies House, the UK company registrar, as well as information provided by academic literature and trade journals such as *Broadcast*, *Televisual*, *Screen Daily* and *Screen International*. The annual survey reports published by *Broadcast* and *Televisual* – the *Broadcast Indie 100* and the *Television Production 100* – are particularly valuable sources despite their national, inevitably London-centric, focus.

We have produced an updated version illustrating where each of the companies in the sector is based in the city (see the fold-out map included in the back cover of this report). Readers may wish to refer to this map when reading the 'Big picture' section of this report, which provides analysis of the quantitative data and describes the key features of each of the seven sub-sectors, and why some companies have tended to cluster in particular areas of the city. Finally, we also feature a series of profiles of companies in the region, both to help draw attention to just some of the fantastic work being done in the city's production sector but also to exemplify and illustrate the more general data and analysis in the report. Sincere thanks to everyone who worked with us on these profiles.

Clusters

The overarching framework for our analysis is based on the concept of a regional 'cluster', a term reintroduced by economic geographers in the 1990s and which has become a mantra of local, regional and national policy makers.[5] 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.[6] 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.[7]

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.[8] 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.[9]

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 and ideas. 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. Creative clusters are almost always concentrated in cosmopolitan cities with extended international influence.[10] As such, firms in creative clusters are part of interrelated regional, national and international systems of production, distribution and exhibition. This multi-layered quality is an important determinant in how clusters operate, but such phenomena are notoriously difficult to evidence, hence the combination of qualitative and quantitative research methods we have adopted in this report. 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

1920

1922: BBC founded;
1927 incorporated under Royal Charter.

1950

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

1980

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

REGIONAL EVENTS

1930

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

1950

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

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

1960

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

1970

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

1976: Aardman founded.

1980

1982: Wildscreen Festival established in Bristol.

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.

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.

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

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

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.

2015

2016 onwards: dramatic increase in the size and scale of the Subscription Video on Demand (SVoDs) streaming platforms – Netflix, Amazon Prime, Disney + – that became commissioners of original series as well as distributors with studios in London.

2017: Government consultation on the future of Channel 4.

2018: Channel 4 initiates '4 All the UK' competition to determine in which cities to relocate; October: Channel 4 announces that its new headquarters will be in Leeds with two creative hubs in Bristol and Glasgow.

2016: The Natural History Unit incorporated into BBC Studios, which launches in 2017.

2017: Bristol awarded UNESCO City of Film status.

2018 (November): Aardman becomes an employee-owned company; Sean Clarke appointed as Managing Director in 2019.

2020

2020 (31 January): First case of COVID-19 reported in the UK; Britain leaves the European Union.

2021 (March): BBC announces its 'Across the UK' strategy that will relocate a further 400 jobs outside London, increase the quota of regional commissioning to 60 per cent and expand regional centres including Bristol.

2021 (September): Government consultation closes about the change of ownership of Channel 4.

2022: Government announces BBC licence freeze and may scrap it altogether.

2022 (4 April): Government announces its intention to press ahead with the privatisation of Channel 4.

2020 (January): Channel 4 opens its Bristol office in Finzels Reach.

2021 (February): £11.8 million expansion programme for The Bottle Yard Studios announced; additional three sound stages to be built.

2021: BBC announces move to Finzels Reach; September: Julian Hector leaves as Director of NHU and is succeeded by Jonny Keeling.

The evolution of the film and television industries in Bristol

The evolution of the film and television industries in Bristol

Some 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.[11] 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, a history that has been deeply intertwined with the city's role in the slave trade, which was highlighted graphically by the toppling of the statue of the plantation owner Edward Colston on 7 June 2020. The painful legacy of this history and the repercussions of this event are being worked through at the present time. Bristol's Mayor, Marvin Rees, has appointed a We Are Bristol History commission to help focus that process. Unlike some of the UK's northern cities, Bristol has never been over-reliant on one particular industry, its diversified and resilient economy proving to be adaptable and responsive to change, able to attract new industries that have enabled Bristol to prosper during a period from the 1970s to the present when the UK restructured from a manufacturing to a service-based economy.[12]

Bristol is also noted for its free-thinking independence and this sensibility 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.

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.

Figure 4 Broadcasting House on Whiteladies Road Clifton; Photo: Andrew Spicer

The BBC: The 'creative anchor'

Creative clusters need the presence of a large, well-connected firm. 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. Established in 1934 as the South West's radio hub, when the BBC was re-structured in the 1970s, BBC Bristol 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). The origins of the NHU 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.[13] 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.[14] Its success fuelled Bristol's growing reputation a national centre for wildlife filmmaking that resulted in the formation of the NHU in April 1957, with an initial staff of eight. 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, from *The Living Planet* (1984) and *The Trials of Life* (1990) to *Planet Earth* (2006) and *A Perfect Planet* (2021). These extremely expensive 'blue chip' programmes are now co-produced with a variety of companies, principally American ones such as Discovery (though the BBC always retains editorial control and maintains strict standards of authenticity). They are marketed internationally by BBC Studios' distribution division, under the brand BBC Earth. These high-end series exist alongside more modestly budgeted 'evergreen' programmes for domestic audiences, such as *Springwatch* (2005–) as well as an extensive online offering. 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' (see pp. 68–77).

However, BBC Bristol encompasses far more than the NHU. For several decades, BBC Bristol was responsible for an extraordinary range of programmes that were household names, from children's programmes (*Animal Magic*, *Vision On* and *Take Hart*) to quiz shows (*Puzzle Trail*) and arts, health and educational programmes (*Words and Pictures*, *Think of a Number*). BBC Bristol also became a major hub for both documentaries – including major observational series such as *Hospital* (1977) and *Strangeways* (1980) and ground-breaking participatory work such as *Open Door* (1973–83) and *Video Nation* (1991–2003) – and drama. Bristol stood in for Peckham across all seven series of BBC One's *Only Fools and Horses* (1981–2003), for example, and *Casualty* (1986–) was filmed in the city for twenty-five years before it was relocated to Cardiff's Roath Lock Studios in 2011.[15]

BBC Studios

One of the major changes since our previous report has been the creation in 2017 of BBC Studios, the commercial subsidiary that is now responsible for producing almost all of what was the BBC's in-house production on a commercial basis. As a wholly-owned subsidiary of the BBC Group (the collective term for the BBC's various constituent parts), BBC Studios is able to pitch and produce content for broadcasters and SVODs all over the world – including the BBC – and behaves in many respects like other super-indies in the industry. Indeed, BBC Studios even has its own stable of owned-indies, such as Baby Cow Productions (*Gavin & Stacey*, 2007–10), Clerkenwell Films (*The End of the F***ing World*, 2017–19) or Sid Gentle Films (*Killing Eve*, 2018–). The key difference, of course, is that BBC Studios, like the rest of the BBC's commercial subsidiaries, is designed to generate income not for shareholders but for the wider BBC Group and its public service mission.

BBC Studios, which gained a major international distribution arm when it was combined with BBC Worldwide in 2018, marks the culmination of a process that has been underway for three decades. The BBC's commissioning budget was first put out for commercial tender in the early 1990s when the Broadcast Act (1990) enabled independent companies to pitch for twenty-five per cent of in-house production. The process continued in 2003, when the Communications Act stipulated that an additional twenty-five per cent of the commissioning budget should be subject to competition between the BBC's in-house teams and the independent sector – what was known as the 'Window of Creative Competition'. In making the entirety of its production budget open to tender at the same time as creating its own commercial subsidiary that could pitch for it – as well as for commissions from any other sources – the BBC was simultaneously embracing the commercial direction of UK television production and positioning itself to extract the maximum public service value from it.

Thus, the creation of BBC Studios – or simply 'Studios', to use the BBC staff shorthand – was arguably one of the most complex and contentious developments in the BBC's history. The Producers Alliance for Cinema and Television (PACT), the trade body for the commercial television sector, argued that it constituted unfair competition because of Studios' inevitably close relationships with the BBC, relationships which, PACT argued, would result in preferential treatment when competing for BBC commissions and financial advantage when competing for commissions from elsewhere (Ofcom 2020).[16] Meanwhile, BECTU, the film and television workers union, argued that the BBC risked losing to the commercial sector all BBC production – 'the crown jewels of the BBC' (Conlon 2016).[17] There were also concerns about the impact of commercialisation on the kind of content BBC Studios would produce. As a commercial entity, would BBC Studios be less inclined to make work that encompassed the BBC's public service values?

Figure 5 Artist's rendering of design for BBC Studios reception in Finzels Reach © BBC Studios

Public service genres that are culturally and socially vital but which tend not to be as profitable as other forms – genres such as children's television, arts and religious programming, documentary and so on – might be at particular risk under this new model.

In Bristol, although the creation of BBC Studios has of course involved major changes in the production sector, there remain significant continuities, and some of the concerns expressed above seem so far unfounded. However, while it is too early to perceive any significant decline in the commissioning of particular genres so far, monitoring this will be important given that commercialisation has resulted in a sharp decline in public service genres on Channel 5 and ITV, for example. The Bristol-based divisions of BBC Studios – the largest BBC Studios production base outside London[18] – continue to be those departments that made BBC Bristol a centre of excellence in natural history and factual entertainment. The NHU now sits under BBC Studios' Factual division, and while Studios' Factual Entertainment division consists of three teams in Belfast, Bristol and Cardiff, the Bristol unit continues to make those shows that were BBC Bristol's in-house staples including *Countryfile*, *Antiques Roadshow*, *See Hear*, *DIY SOS*, *Fake or Fortune* and *Gardeners' World*. These and other previously in-house commissions made in Bristol and elsewhere in the country go out to tender on a rolling basis throughout the licence fee period, and although the Studios' teams in Bristol have so far won those all those tenders, other parts of Studios have lost productions.

For example, *Songs of Praise* was won by a joint bid from Avanti Media, based in Cardiff, and Nine Lives Media, based in Manchester; *Mastermind* was won by a joint bid from London-based indies Hat Trick and Hindsight Productions, and will be produced in Belfast with support from Northern Ireland Screen.

However, should the Bristol-based parts of the BBC Studios lose a tender to an indie, the shows themselves are likely to remain in the city because the BBC can stipulate the location of production in the tender. In this way the BBC's commercial tendering process is to some extent regulated to ensure the creative health of the nations and regions and mitigate London's centrifugal pull – even if BBC Studios loses its commissions. However, we should note that BBC Studios can also, of course, win new commissions from other broadcasters. Indeed, Studios' first commission for ITV, *Inside the Duchy* – a two-part series about the private estate that provides the income for the Prince of Wales, his family and his charitable organisations – was awarded in 2019 and will be produced from Bristol. BBC Studios unscripted division also has two Channel 4 productions being made in Bristol and a Channel 5 series in Cardiff.

In interview, Sallie Bevan and Jon Swain,[19] the BBC Studios executives then responsible for its unscripted teams, emphasised the positive aspects of these non-BBC commissions for Bristol's freelance workforce:

> there's a broader range of more interesting work for everyone to work on. For that freelance pool in Bristol, the fact that within the BBC in Bristol there aren't only BBC shows but there are potentially other shows is a benefit for them. It makes BBC Bristol a more exciting place to work. Rather than the same old shows, people know that they've got other options as well.

The greater volume and variety of shows certainly helps add variety to the range of work available in Bristol and benefits the freelance pool through the increased amount of work available. It also assists with career development, affording early career workers more opportunities to explore different genres and ways of working. However, the creation of BBC Studios in itself furthers the dependence of the production sector on precariously employed freelance workers – workers who were previously employed on more stable, in-house contracts. As discussed elsewhere in this report, the current boom in production has resulted in intense competition for freelancers which, while increasing employment opportunities, is also placing significant pressure on the workforce. Aside from the well-documented negative aspects of precarious employment – no holiday or sick pay, stop-start working patterns, intense hours and so on (Genders 2019) – the largely freelance nature of employment in the film and television industries was a key reason why so many workers in the sector were so badly impacted by the pandemic (see pp. 40–7).

Regardless of the nature of their contract, workers involved in BBC production now refer to themselves as either 'Studios' or 'public service', to distinguish between those based in the commercial subsidiary and those directly employed by its PSB parent. Until recently, both Studios and public service staff were based in BBC Bristol's historic headquarters on Whiteladies Road. However, in early 2021, it was announced that Studios' staff – that is, the NHU and Bristol's Factual Entertainment unit – would be relocating to three floors in the Bridgewater House building at Finzels Reach, a stone's throw from the new Channel 4 base in the city centre (discussed below). For the present, BBC Bristol's public service staff will remain at Whiteladies Road, 'while future options are explored'.[20] Because BBC Studios does not include the BBC's news and radio divisions (with the exception of BBC Radio Comedy, which is part of Studios), staff retained at Whiteladies Road includes the production teams working on Radio Bristol; Points West, the regional news programme; and the Radio 4 team.

BBC Studios' Finzels Reach base will not only help reinforce the distinction between Studios and the public service side of the BBC but also places Studios staff in close proximity to the commissioning teams at Channel 4, with whom the Studios' executives will be keen to build and maintain close relationships. It also helps shift the historic centre of the city's screen industries away from the predominantly white, wealthy suburb of Clifton, which is perceived by some to be a small step forward in the city's struggle to address the lack of diversity in its production workforce.

Figure 6 Documentary and wildlife cameraman Vianet Djenguet receiving the Presenter Award at Wildscreen 2020 © JonCraig Photos

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 twenty-six 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 benefitted from the presence of a second public service broadcaster in the city: Harlech Television (HTV). When commercial broadcasting was introduced in the 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).[21] 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.[22] Although this laudable dream was undermined by the development of a cartel of the 'Big Four' companies in 1955 – ABC, Associated-Rediffusion, ATV and Granada – which made the overwhelming majority of nationally networked programmes, they and 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.[23] When the franchises were reallocated in 1967, TWW lost out to Harlech Television (named after its chairman Lord Harlech), which became HTV in 1970. When a second transmitter was built in 1970, HTV, which had purchased TWW's facilities in Bristol and Cardiff, became two virtually autonomous halves (HTV Wales and HTV West) each with its own board and local programming.[24]

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, following the 2003 Communications Act, Granada merged with Carlton to create a single London-based ITV company whose focus was national and international programming. Regional production was cut to the minimum level of local news and features required to satisfy its commercial public service licence 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 building still houses ITV West regional news but the building itself was sold to Cube Real Estate, a property developer, in 2010. Although, as our epigraph quotation opines, the loss of an ITV production base has been a substantial blow to the health and size of Bristol's television industries, there are many screen industry professionals still working in Bristol who remember, often with much fondness, their period working at HTV, the invaluable experience it provided in developing the skills necessary to further their careers, and the quality of the programmes that the company produced. To some it was a genuine alternative to working for the BBC, one that could be more stimulating and dynamic.

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. In 1976, as an attempt to convert a hobby into gainful employment, they located to 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 more appealing than staying in the London suburbs. 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 many of Aardman's productions their distinctively hand-made look. Aardman has enjoyed a remarkable growth in its 45-year existence and 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. Aardman has additional studio space in Aztec West on the north-western outskirts of Bristol where its feature films are shot.

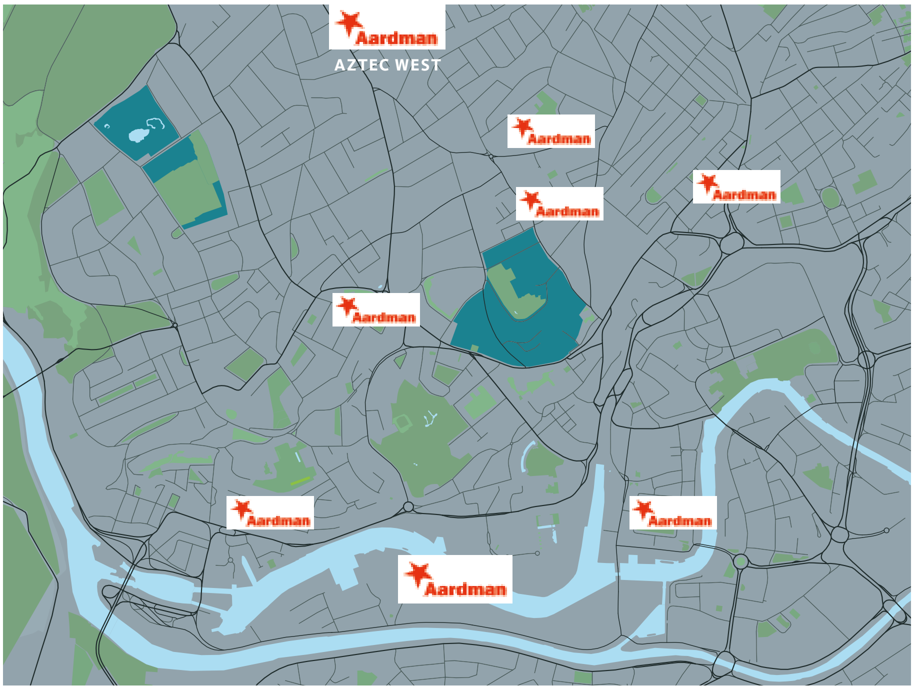


Figure 7 Aardman's shifting locations in Bristol; courtesy of David Sproxton

It was during the late 1980s that Aardman started to grow rapidly, making more ambitious programmes such as Nick Park's Wallace & Gromit half hour films for the BBC beginning with *A Grand Day Out* (1989) and the *Lip Synch* 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 the "Heat Electric" advertising campaign helped develop the company's commercials production division, which has become a major part of the studio's business. This revenue helped Aardman develop its ambitions to make feature films, secured through a deal with the American animation studio, 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 Pictures Animation: *Arthur Christmas* (2011) and *The Pirates! In an Adventure with Scientists!* (2012). Through a partnership with the European media conglomerate StudioCanal that began in 2013, Aardman has made *Shaun the Sheep: The Movie* (2015), based on the successful television series, and a sequel, *A Shaun the Sheep Movie: Farmageddon* (2019). Park also developed and directed his feature film *Early Man* (2018) for StudioCanal.

The global success of Aardman's characters – Morph, Wallace & Gromit and Shaun the Sheep – has enabled the company to expand to its present scale, with a company structure that is now more holistic: Distribution deals with third party commissions; Development incorporates features, TV series, specials, and games; Production covers all genres, styles and techniques; Marketing encompasses all areas. In addition to licensing its characters through virtual entertainment, VR, apps and games, plus merchandise such as toys, books, stationery, figurines and accessories, the company has developed a number of small scale attractions and live events with various partners around the world, including the Wallace & Gromit 'experience' in Blackpool and Shaun the Sheep Land at Skånes Durpark in Sweden. Aardman has also expanded into significant online distribution through over thirty digital partnerships, including Netflix, Amazon Prime and iTunes, on a revenue-sharing basis. Aardman continues to experiment, using a YouTube channel – Aardboiled – as its platform for 'more leftfield work' and in recent years has 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.

Figure 8 Aardman's Headquarters on Bristol's Dockside; Courtesy of David Sproxton

Figure 9 *Shaun the Sheep: The Farmer's Llamas* (2015) © Aardman Animations

Since 2017, Aardman has continued to operate across a range of platforms, partnering with an increasing number of often international organisations. These range from the American multinational giant Atari that will use Aardman's globally-known characters for its theme park management series *RollerCoaster Tycoon* for mobile devices, to the animal welfare charity Born Free Foundation for the animated film *Creature Discomforts: Life in Lockdown*, which used the format of Park's pioneering 1989 *Creature Comforts* mockumentary to draw suggestive parallels between the COVID-19 pandemic restrictions and animals in captivity.

Another sequel, this time of *Chicken Run*, is in production, in partnership with DreamWorks, Netflix and Universal, and plans have been announced for a Bollywood-inspired film about Bodhi, a young Indian elephant, described as a 'warm-hearted musical aimed at a global audience', to be directed by Gurinder Chadha. Aardman also partnered with Netflix on a festive musical special, *Robin Robin*, released exclusively on its platform on 24 November 2021; Sky has commissioned a pre-school series, *The Very Small Creatures*, for its Sky Kids platform; and *Wallace and Gromit: The Big Fix Up*, an augmented reality 'epic adventure' in which audiences can interact with the ongoing story to 'fix up' Bristol, was launched in 2021. Each production demonstrates the new funding and distribution landscape for the UK's media companies. Aardman's *Lloyd of the Flies*, a new CGI/2D 'entomological family sitcom', will be shown on the free to air children's channel CITV; the company continues to make an array of advertising shorts.

Aardman's exceptional success has enabled it to act as a magnet for other animation companies and there is now a distinct animation sector on Bristol's dockside and indeed throughout the city. The company has also taken a very active civic role and become woven into the fabric of Bristol's cultural 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.[25] Wallace & Gromit's Grand Appeal has raised over £50 million for the Bristol Children's Hospital Charity since 1995.

Although Aardman's recent work shows the strong continuities that underpin its production slate, the company underwent a significant change in structure when it became an Employee-Owned firm in November 2018. Lord and Sproxton were convinced that had they opted for a conventional trade sale to a larger media organisation, Aardman would have ceased to exist, except as a brand, within the space of a few years. To preserve Aardman's ethos and values, Lord and Sproxton decided that employee ownership was the best option, expressing their longstanding belief that 'those that do the work should benefit from the profits of their work'. Employee ownership is informed by concepts of social justice and equality but also fosters a shared sense of responsibility and commitment to the company's fortunes. Lord continues to be Creative Director, but Sproxton stepped down from his role as Executive Chairman in November 2019. Sean Clarke, who joined Aardman in 1998 to lead its Rights department, was promoted to Managing Director in 2019 with a remit to increase Aardman's work in interactivity, 4D and augmented/immersive storytelling, and expand its global reach and range of markets in a sector that is growing rapidly. However, as Clarke explained in interview, he is answerable to a board of trustees, including Sproxton, which means that he cannot take the company in a 'direction that fundamentally changes' its founders' vision. The Partner Rep Group – 'the cultural heart of the studio' – ensures employee/partners' views are heard, including the large pool of freelance workers. Aardman hopes its example will encourage other media companies to embrace employee ownership.

The rise of the independent sector

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' that relied on outside companies for its programming.[26] Even more significant for Bristol was the 1990 Broadcasting Act, which required the BBC to allocate at least 25 per cent of its production budget to competitive tender from independent companies. Bristol's first generation of independent companies – such as Available Light Productions, BDH, Beeley Productions, Green Umbrella, Icon Films (see case study p. 73), 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. As noted, in 2007, the BBC implemented the

‘Window of Creative Competition’ commissioning policy in which 50 per cent of its programming budget had to be allocated to independent suppliers. Thus, almost all of what was the BBC’s in-house production has been transferred to BBC Studios, which now operates like an indie pitching for commissions. These developments have resulted in a somewhat 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.

Figure 10 David Suchet with miners from South Wales in *People I Have Shot* (2012) © Testimony Films

A watershed moment was the 2003 Communications Act, which altered the terms of trade so that indies were able to retain IP in the programmes they produced. This enabled them to grow and to attract further investment leading to greater stability as well as expansion. In the process, these successful independents become attractive for acquisition by ‘super-indies’, in which smaller firms have been absorbed into huge global (mainly American) corporations that are often structured as loose constellations of semi-separate companies with greater or lesser degrees of creative autonomy from the parent company.[27] Silverback, for instance, was acquired by All3 Media in December 2020 (see case study on p. 59). This absorption has several attractions for indies because it offers greater resources, especially improved access to financing for development and production, a global distribution network and the bargaining power of a large corporation to negotiate sales – an entity often far bigger than the broadcaster with which it is negotiating. Most broadcasters see advantages in dealing with ‘owned indies’ that have increased stability and enhanced production resources available.

However, some commentators have argued that this absorption into a super-indie makes owned indies less locally or nationally embedded and more risk-averse, with a tendency to make programmes for the international marketplace using tried and tested formats.[28] Others have questioned whether the change in ownership actually has much, if any, direct bearing on programme content and that the enhanced resources of belonging to a super-indie can actually increase risk-taking and experimentation. One recent study has argued: ‘There is little evidence that takeovers have any immediate, significant or sustained effect, individually or by group category, on such key attributes of content as its “Britishness”, or its ratings and popularity, or its performance in terms of awards or critical acclaim … a key priority following acquisition will be to ensure continuity in the firm’s creative leadership so as to maintain its creative brand, identity and value’, their reputational capital.[29] A recent trend had been for emergent indies to start up on the basis that they will be bought up, if successful, at the end of their first three to five years and to plan their business model and programme strategy accordingly. This has led to the growth of a small number of specialist intermediaries, which act as brokers between these companies and their prospective purchasers.[30]

The independent sector remains highly volatile with a constant churn of companies, but with the present upsurge in UK production driven principally by the SVODs, there is at present no shortage of companies eager to enter the marketplace.[31] This has been demonstrated by the increased number of companies in Bristol as detailed in this report, rising from 131 in 2016 to 189 in 2021. Although, as discussed, there has been a tendency towards acquisition by larger firms, most companies in Bristol, such as Icon Films, remain ‘true’ indies, individually owned and run. Overall, there is a variety of ownership models and the two largest companies have retained their independence: Aardman, as discussed, opting for employee ownership, Plimsoll for an equity finance deal with Lloyds Bank (see above and case study on p. 63).

CABLES AND CAMERAS

Cables and Cameras is a production and exhibition organisation established in 2018 by long-standing Bristol-based filmmaker and designer, Gary Thompson. Thompson began making work in Bristol's jungle and drum 'n' bass scene in Bristol in the 1990s, shooting club nights and music videos and working on the covers and promotional material for Full Cycle, the award-winning record label run by Roni Size and DJ Krust. After working for several years in a range of music, media-related and youth education roles in and around Bristol, Thompson returned to education in 2017 to pursue a degree in Journalism and Filmmaking at UWE Bristol. This was driven partly by a desire to counter the discrimination Thompson experienced finding work, and partly to ensure his experience was matched by formal qualifications. As he puts it, 'it just got to the point where I felt I had the experience, and now if I get the papers, they can't say anything'. Conscious of the lack of screening events for filmmakers of colour in Bristol, Thompson formed Cables and Cameras while studying. Designed as a forum for people to come together and screen their work, socialise and network, Cables and Cameras quickly developed into a regular event that consistently attracted up to forty people to The Cube, Bristol's DIY, volunteer-run cinema. Since then, Cables and Cameras has spread to other venues in the city, staging a wide range of screenings and events and partnering with organisations such as BBC Digital Cities, Bristol Black Horror Club and Encounters Short Film Festival. The group has also expanded into production, and is currently supporting several non-fiction projects. In September 2021, Cables and Cables partnered with Watershed cinema and several other regional and national screen-sector organisations on INSPIRED, a three-day event dedicated to celebrating black and brown film talent and exploring how communities of colour can be better represented in the industry and on screen.

Figure 11 Adam Murray and Gary Thompson on stage at The Cube at Cables & Cameras' Black Pyramid Film & Video Retrospective, 15 March 2018 © Gary Thompson

Figure 12 Interior of Channel 4's offices in Finzels Reach © Channel 4

Channel 4 comes to Bristol

Channel 4 opened its Bristol offices in January 2020. This move formed part of the broadcaster's relocation outside London in what was a widely publicised and keenly contested competition – '4 All the UK' – in which over 30 cities made bids to host this publicly owned but commercially financed publisher-broadcaster.[32] Bristol was one of six cities shortlisted, the others being Birmingham, Cardiff, Glasgow, Leeds and Manchester. Bristol was chosen as one of two 'creative hubs' (the other was Glasgow); Leeds was selected as Channel 4's new headquarters. The relocation was initiated by the Conservative government which, having pulled back on its initial idea to privatise Channel 4, determined that the move would form part of its policy of 'spreading jobs and prosperity throughout the UK'.[33] Channel 4 initially resisted the move but Alex Mahon, appointed CEO in July 2017, saw relocation as an opportunity to broaden the broadcaster's commissioning process, 'to change the flavours and the values and the communities that you see on screen and change the way that decisions are made about what is on screen … it is hard to get that diversity of thought and creativity and backgrounds that go with that if everyone works and lives in London'.[34] Channel 4's relocation forms part of a longer process designed to reduce London's dominance over the UK's screen industries. This was the impetus behind the BBC moving five of its departments from London to Salford, Greater Manchester, in 2012, for example, – as part of the creation of MediaCityUK.[35] The communications regulator, Ofcom, helps implement this policy of decentralisation through regional production quotas, currently 50% for the BBC, 35% for Channel 4 and ITV and 10% for Channel 5. Relocation will spearhead Channel 4's own commitment to have 50% of its production spend outside London by 2023.

Bristol comfortably fulfilled Channel 4's basic selection criteria – to be within four hours traveling time to London, have a 'high level' of digital connectivity and be 'in proximity' to a 'well-developed' community of independent production companies. However, to beat its rivals, Bristol had to make a compelling case about its distinctive qualities as a 'creative city' and its alignment with Channel 4's core values of diversity and experimentation. The campaign, orchestrated by Mayor Marvin Rees, brought together the major players in Bristol's screen ecology to produce a short promotional film and three written documents – *Invent the Future of Channel 4 with Bristol*, *Bristol as a Creative Greenhouse* and *Bristol City Impact* – that tried to distil the city's offer. The bid was mapped adroitly to Channel 4's values, which Rees summed up in his speech when Channel 4 opened its doors:

> Bristol is an ideal partner for Channel 4, as a thriving, diverse and innovative city. It's also a hotbed of creative talent which is developed and sustained by a wealth of industry partners and experts … We believe that Bristol not only reflects the core values of Channel 4, but it is the only city that will enable Channel 4 to continue to be at the forefront of unorthodox production design.[36]

The bid emphasised Bristol's multicultural diversity – ninety-two languages from 187 different countries of origin; its accent on youth; its creativity – promoted as an 'innovation lab' and a 'creative greenhouse'; its strong high-tech presence including a Virtual Reality hub launched in September 2017 and a 5G accelerator; and the attractions of its Enterprise Zone (Temple Quarter) around the main train station, with discounted business rates, superfast broadband and 'simplified planning'. Most of all, Bristol's pitch emphasised the city's contrarian history, its reputation for the 'unorthodox and the experimental' – 'Bristol offers a place to not just structure differently but to *think differently*'.[37]

Two other elements of Bristol's pitch stood out. The first was the city's forward-thinking vision, its determination to diversify its existing screen ecosystem from a production focus to encompass commissioning and distribution capacity and its aspiration to evolve, in Rees's words, from a 'current centre of excellence to *a future globally significant creative city* … The additionality of a strong Channel 4 presence in Bristol is not just the catalytic effect on the existing creative industries in the city, but also a wider linkage to the West of England region into the productive capacity in Cardiff.'[38] This last statement reflected the high-level discussions between politicians and planners about the two cities, Bristol and Cardiff, coming together as part of the 'Western Gateway' now that the tolls have been removed from the M4 motorway across the River Severn.[39]

The second was the offer of a *'structured long-term partnership'* predicated on shared priorities and a joint vision. The pitch made mention of several 'proactive and immediately actionable projects' under two main headings: 'Diversity and Inclusion'/ 'Innovation and Technology', delivering tangible results for both parties. The union of Channel 4 and Bristol would be an 'engaged partnership' with reach across key audiences and 'defined commercial needs', delivering industry-leading innovation. The partnership would enable 'new voices to grow the next generation of content producing businesses' and would be a means to support a 'new wave of young, diverse and digitally native talent [that] can accelerate the evolution of the media sector in Bristol with Channel 4'.[40] There was the promise of co-operation between the city and the broadcaster with education and training – inclusive talent pathways that would offer apprenticeships to under-represented communities.

Bristol's successful pitch for hub status was therefore a combination of the visionary and the pragmatic. According to Kevin Blacoe, Channel 4's Head of Partnerships, Nations and Regions, part of Bristol's appeal was its status as a 'sweet spot in terms of maturity of production but with the scope for accelerating that development', thus offering an evolved screen ecology that could be further enhanced through the partnership. Channel 4's decision to locate its office space in the Fermentation Building in Finzels Reach – a recently transformed waterfront quarter near Bristol's medieval centre – was at once convenient (close to the main train station, Temple Meads, and the Temple Quarter Enterprise Zone), but also redolent of the broadcaster's 'alternative', bohemian brand. As Blacoe enthused, the location 'fits the slightly Channel 4 look, feel and values. We think we're a bit quirky, arty, all those sorts of things'. Finzels Reach is also in the centre of Bristol and thus, as already noted, part of the shift away from Clifton as the central locus for screen industry firms. In interview, Mirzoeff argued that Channel 4 sees its role as connecting different parts of Bristol through its central location, opening part of its offices as a 'semi open space' for indies to use for meetings and networking. Bristol City Council and a working group of screen professionals involved in the original pitch continue to work with Channel 4 to ensure that all sections of Bristol's creative community can benefit from the broadcaster's presence in the city.

Figure 13 Exterior of Channel 4's offices in Finzels Reach; Photo: Steve Presence

Channel 4's Creative Hub in Bristol houses commissioners in Daytime (Kate Thomas), Drama (Gwawr Marthan Lloyd), Factual and Popular Factual (Daniel Fromm) and part of the broadcaster's national Creative Diversity team (Izzy Francke) together with a complement of ten full-time staff that will rise to twenty in 2022. It is headed by Sacha Mirzoeff, an experienced ex-BBC, award-winning documentarist and former head of an indie, Marble Films, who is well-known in Bristol having worked in the city for twenty years. Mirzoeff sees strong synergies, 'a "natural match"' between Bristol and Channel 4 as mirror images: 'Innovation and originality have always been our traits, just as they have been with Channel 4. We both have a long history of being questioning, subversive and at times cage-rattling. Bristol provides the perfect countercultural ecosystem for a channel with the core value of championing the underrepresented and daring to go where others fear to tread … [it's] a strong and natural home for us.'[41]

In contradistinction to the BBC's model of regional production – a combination of various 'centres of excellence' and locating five departments in MediaCity – Channel 4's three sites form an interlacing network in which commissioners at all sites are free to work with indies anywhere in the UK, with commissioning decisions based predominantly on merit rather than geography. Therefore, although the regional commissioning teams do have a strong regional focus and aim to build on existing strengths and embed themselves in local ecologies, not all Channel 4 shows made by Bristol indies will necessarily be commissioned from Bristol.

Mirzoeff's particular focus is to cultivate Bristol's cultural diversity through Channel 4's Emerging Indie fund, which is specifically targeted at small indies working in any genre in the nations and regions, and which is designed to help fast track their development through funding, mentoring and commercial advice. Four Bristol companies have so far benefitted: Indefinite Films, Drummer TV (see p. 62), Blak Wave Productions (see p. 38) and Proper Job Films. Two other Channel 4 funds are also targeted at regional producers. The Indie Growth Fund invests in selected companies in return for a minority equity stake, offering business advice and commercial expertise. Five Mile Films, a new Bristol factual company set-up by Channel 4's former Head of Documentaries, Nick Mirsky, was the first Bristol indie to access this fund, which has also been refocused to prioritise the nations and regions. A third tranche of money, the Accelerator Fund, launched in July 2020, is specifically targeted at Black-owned companies to speed their development. Each indie the broadcaster works with is chosen on the basis of the quality of its ideas but also that it evinces a commitment to using a broad range of personnel which is facilitated and monitored by the Creative Diversity team. In 2020, Channel 4 launched its training and support arm, 4Skills, to work with the Council and other agencies to address the widespread skills shortage the production boom has created. Although 4Skills is part of a broader outreach programme that has a specific focus on entry-level schemes and internships, the scheme aims to target appropriate support for personnel at different levels within the industry and at different stages of their careers.

It is too early, particularly because of the delays caused by the COVID-19 pandemic, to evaluate in any depth Channel 4's impact on Bristol's screen ecology.[42] However, the broadcaster has already commissioned a number of Bristol-based programmes which implement its commitment to diversity, inclusivity, under-represented groups and new voices. For example, Mirzoeff has commissioned several projects by producers of colour, including Blak Wave's *The Shadow of Slavery* for Channel 4's *Take Your Knee Off My Neck* series exploring British filmmakers' response to George Floyd's killing in May 2020. In addition, Mirzoeff is keen to attract companies such as Twenty Twenty, producer of the hugely successful *First Dates* reality format (now in its sixteenth series), to relocate to Bristol. As he explained, 'that's as important to us as the actual programmes, that we're changing the workforce on the ground here … bringing in a wider range of voices from different communities'. As argued elsewhere in this report, Bristol is also trying to recover its position as a centre for drama and having a drama commissioner as part of Channel 4's Bristol team will encourage that growth. Having a national broadcaster has indeed significantly enhanced Bristol's status as a regional centre, and Channel 4 has been incorporated into the Bristol brand as a prosperous, desirable and yet 'edgy' city. However, Channel 4 also conceives its Bristol location as providing the locus for working with indies throughout the South West and in Wales, where it is actively working with Creative Wales to help get ideas into production.

As we prepare this report for publication in early 2022, Channel 4 was again in the spotlight because the government reignited calls for the broadcaster to be privatised. The consultation process will take some time but there is a widespread feeling that this is, as former Channel 4 CEO, David Abraham, put it in 2016, 'a solution looking for a problem'. Channel 4 remains in good financial health despite the pandemic and is making significant moves to increase its online offering and lessen its dependency on advertising revenue. While there are long-term challenges – competition from streaming services, fragmenting audiences, declining advertising revenue – these would exist were the broadcaster privately owned, and it would also have to generate revenue for shareholders.[43] Consequently, the move has been seen as an ideologically-driven attack on public service broadcasting and perhaps an attempt to silence a critical voice. Many fear that the virtues that Channel 4 has demonstrated over 40 years – its commitment to diversity, plurality of voices, experimentation and minority programming – would be severely eroded if it was privatised. Furthermore, there is a justifiable concern that a privately-owned Channel 4 would roll back on its commitments to the nations and regions and revert to being a London-based company in the interests of 'efficiency'.[44]

Figure 14 Edith Bowman in conversation with Hans Zimmer, Wildscreen 2020 © JonCraig Photos

BLAK WAVE PRODUCTIONS

Blak Wave was founded at the end of 2019, making it one of the more recent editions to the sector and one which has already secured commissions from Channel 4, the BBC and the BFI. Blak Wave is also – along with Cables and Cameras (see profile on p. 31) – one of the few Black-led production companies in the city. Founded by producer, writer-director Michael Jenkins and producer-director Dr Somina 'Mena' Fombo, Blak Wave was established with the aim of creating imaginative non-fiction content for broadcasters that reflects the experiences of the Black community. Blak Wave's focus on broadcasters as opposed to digital platforms was an important part of the company's formation, Jenkins and Fombo being cognizant of the significant audiences still reached via television: 'that's why I want to do stuff on TV rather just digital platforms or online, because the TV audience is still very powerful and influential. It still has significance in terms of people's consumption of media, so I still want to tackle that audience.' That said, the company is also keen to target streaming platforms and, while retaining a focus on documentary, has also branched into fiction filmmaking: Jenkins' BFI-funded short film, *Pickney*, premiered at Watershed in September 2021 and the company has partnered with the BFI Film Hub South West on 'New Voices', a talent-development scheme for new writers and directors of colour to develop live-action projects.

Figure 15
Home Carnival Queen
(dir. Somina Fombo, 2020)
© Blak Wave Productions

Although both Jenkins and Fombo are originally from Bristol, neither experienced straight-forward trajectories into the city's screen industries. Years before establishing Blak Wave, Fombo sought to break into the industry after graduating from UWE with a media production degree, but was unsuccessful. She moved into youth work and relocated to London. Jenkins, meanwhile, never conceived that a career in film or television was available to him and was disillusioned with mainstream film and television culture:

I wasn't happy with what I was seeing on TV and was angry at the media because of all the racism and stereotypes. I hated platforms like the BBC, the news – I thought they were the enemy. So I never thought working with the BBC was an option for me. I thought, "they're never going to give me a voice, and they haven't got any black people there anyway, so I've just got to do it myself"

Jenkins began making music videos independently, and it was only when he got to Sheffield Doc/Fest – via a period of unemployment, a Prince's Trust mentoring programme and volunteering at BCFM (Bristol Community Radio) – that he really discovered the nonfiction form: 'I saw all these documentaries and they just really inspired me. I suddenly realized, "Okay, I want to try and make documentary". Now, with several commissions from both BBC and Channel 4 as well as the BFI, Blak Wave looks set to develop into a significant Bristol-based entity and Jenkins has no desire to relocate to London. 'I don't have any aspirations to go to London – I want to see what sort of opportunities can be created from here. Now, with BBC and Channel 4 here, I'm thinking, "why do I need to move out of the region? Maybe we can make something work here".'

COVID-19 and screen sector production in Bristol

COVID-19 and screen sector production in Bristol

The first two cases of COVID-19 in the UK were confirmed on January 31. Less than two months later, on March 20, that figure had jumped to almost 4,000 and the UK entered its first lockdown, with the population instructed to stay at home.[45] All cultural, educational, leisure and social facilities closed and all non-essential travel was banned. With the exception of essential news and journalism services, all film and television production shut down. The impact on the screen industries was enormous. The production sector's reliance on freelance labour left much of the workforce particularly exposed: by April, ninety-three per cent of the UK's film and television freelancers were out of work as a result of the pandemic.[46]

While we were unable to conduct any detailed research with Bristol's freelance community – an essential element of future research in this field (see recommendations) – we were able to explore the various impacts the pandemic had on the city's production companies. In this section of the report, we discuss the immediate and mid-term challenges posed by COVID-19 – such as the ban on international travel, insurance difficulties or the shift to home-working – and how production companies responded, such as by focusing on pre- and post-production or on particular genres, for example. We also explore some of the potentially positive consequences of the pandemic on Bristol's production sector – less carbon-heavy workflows and video-calls resulted in a reduced sense of London-centrism, for example – as well as how some of these changes are generating both new possibilities alongside new pressures and anxieties for the sector.

Immediate impact: travel, insurance, home-working

The immediate impact of the pandemic was felt differently in different sectors of the industry. The travel ban had a particularly severe impact on the natural history sub-sector because so much of its work depends on large teams working overseas. This also had significant knock-on effects for the large number of facilities companies in Bristol that provide support services to the natural history sub-sector. Because of the scale of natural history filmmaking in the sector, Bristol was hit hard in this respect. Several of the region's major natural history firms emphasised to us that, for them, 'travel was the big one':

> We had dozens, maybe even hundreds, of people in various parts of the world when this pandemic hit and lockdown arrived and we had to get people back from pretty much every continent in the world …

> The immediate impact was that everything stopped. That's a big deal because these large landmarks take a long time to make. In the natural history genre the story is out there, it's not in here. For us to do our work, we have to be in the world and working with people who are embedded in the natural world to bring those stories to audiences. So, the immediate impact of covid was to have to stop everything. That therefore means stopping filming, stopping capturing content. That means delays. Delays mean money.

As elsewhere in the screen sector, the inability to insure productions against risks posed by COVID-19 was another major hindrance for the natural history sub-sector early in the pandemic. One CEO emphasised how this issue was working actively against them securing new commissions:

> If I send seven people off to wherever I need to send them, they then have to quarantine for fourteen days. Say one of them gets covid and they can't continue. Who's going to pick up the bill? The insurers aren't at the moment so I'm not going to pick up the bill. I can't afford to, so I won't take the commission.

This issue was not addressed until July 28 when the government launched the Film and TV Production Restart Scheme. As part of this £500m scheme, which was developed by the BFI's Screen Sector Taskforce and the DCMS, UK productions halted or delayed by an inability to obtain insurance for COVID-19-related risks were provided with assurance that they would be supported if they encountered any pandemic-related delays or disruptions. According to the BFI, by mid-April 2021 the scheme had supported 800 productions to restart (though the extent to which Bristol companies accessed the scheme is unclear).[47] The scheme ran until June 2022.

The shift to home-working was another early challenge posed by the pandemic, but one which was also experienced differently in different sub-sectors. Many interviewees emphasised the challenges of keeping up-to-date with all the new and often rapidly changing protocols, and of accommodating the needs of their staff accordingly. Several reported taking the decision to close their offices even before the lockdown was announced, judging the government's decision-making on the matter to be too slow. While some of the animation companies we spoke to described the transition to home-working as 'remarkably painless', for other firms – especially those in the natural history and post-production sub-sectors – this period was felt to be the most challenging and professionally exhausting time in their entire careers. Issues arising from the closure of offices and transitioning to home-working was particularly challenging for those firms whose work requires high-end technology or which involves data security issues. As one post-production company executive put it to us:

> once we started to work more with Netflix and Apple, because they are companies that come from computer backgrounds, they were much stricter on policies for sharing media on drives. The drives had to be encrypted. There were a lot of conversations that had to be had about whether we could even do drives offsite if the drives weren't encrypted. Or if people could pick up media from offsite. Was that possible? For instance: track layers. If they are working from home, is that a good thing or a bad thing? How can we make it so that people wouldn't know it was an Apple project? Or that the media couldn't be used or picked up by somebody else in transit, if you like.

Our interviewees also expressed mixed feelings about the shift to home-working and the impact this had in terms of production practices, employment patterns and work cultures. Some were conscious of the negative effects on the creative process and the limitations of Zoom meetings in terms of facilitating dialogue and discussion among teams. The loss of informal, unplanned interaction was also considered to be significant, with many interviewees noting the value of small-talk and 'chit-chat' in the production process. Online meetings were also noted for the additional strain they placed on staff:

> it's exhausting, the level of concentration required seems to be much higher so people are finding it tiring [and] while we've learnt that you often don't need to meet face-to-face, the energy does slightly go out of things. So we're looking forward to some face-to-face time because certainly creatively you can't beat it.

On the other hand, home-working does, of course, have upsides for staff well-being, and companies were keen to try to maintain some of these beyond the immediate impact of the pandemic: 'we put the word out: "Who actually is interested in coming back in?" Not many people were interested in coming back'. While some workers enjoy the bustle and liveliness of offices spaces, the option to work from home clearly suits others, and companies seem open to maintaining that option: 'there will be less travel and more working from home. We'll look at how we can keep some of the flexibility, speed and adaptability.'

Coping mechanisms: genre shifts and pre- and post-production

With the vast majority of UK screen sector production on-hold, companies developed a range of coping mechanisms to see them through the lockdown in the medium-term. Often this involved shifting focus slightly to a film form that did not require close interpersonal contact to produce or was generally deemed more manageable in light of the new rules governing social distancing and travel. These genre shifts took different shapes depending on the sub-sector. For factual and natural history companies, interviewees spoke of working with archival materials and pre-existing footage. Branded content firms shifted focus to animated projects or incorporated more CGI into their existing commissions; the animation companies we spoke to were reassured that their workflows remained fairly reliable. In this respect, the fact that the region's production sector is still largely oriented towards unscripted content appears to have mitigated the pandemic's impact to some extent. This is supported by recent national data, with the *Broadcast Indie Survey 2021* demonstrating that scripted firms were the hardest hit by covid, 'primarily because of the complex logistics of getting major dramas into production'.[48]

Regardless of the genre, companies' coping mechanisms often included a focus on pre- and post-production work. As one major factual firm put it to us: 'as long as this [travel ban] continues, what you can do in TV production is essentially the front- and back-end'. In terms of pre-production, many companies concentrated on trying to 'ride out' the production hiatus by pitching ideas to commissioners and on developing new relationships. While this approach proved successful for some – one company executive happily reported that they had managed to use the time effectively by securing 'six new pieces of business' – others were concerned at the bottlenecks that were forming at different stages in the value chain (see below).

Others saw the lockdown as an opportunity for staff training and development. While almost all companies we spoke to made use of the furlough scheme – typically by approximately 10–15 per cent of their FTE employees but some by as much as 50 and 60 per cent – many also reported the need to develop initiatives to support staff wellbeing, either to cope with anxiety and isolation or, in the case of those with families, to cope with the pressure of working and home-schooling children.

Longer-term impact: in-country crew, bottlenecks, booms and burnout

One of the major longer-term potential impacts of the pandemic is the shift towards natural history production companies using more ‘in-country’ crews – production teams that live in the places in which the films are made – rather than flying out all kit and crew from Bristol. Almost all the natural history companies we spoke to discussed how this shift was already happening, and that though it was occasioned by COVID-19, was likely to be a permanent and increasing feature of productions.

> Getting on a plane and going somewhere has become unnecessary. We’re working with an Australian underwater cameraman right now. Normally, one of our guys would be out there with him [but] he’s got on with it on his own. We’ve got another guy underwater in South Africa, he’s running the shoot himself.

This is a complex and contentious issue with significant implications for the environment, the workforce in Bristol and overseas, and the companies that employ them. If this shift continues, the reduction in flights could drastically reduce the carbon footprint of Bristol’s natural history sub-sector. As noted in our case-study on Filmmakers for Future: Wildlife (see p. 75–7), the environmental impact of wildlife filmmaking is an urgent and challenging task for the sector that is slowly becoming more of a priority for production companies. Natural history is now acknowledged by Albert as the most polluting of all genres, and, as discussed, there is an increasing awareness among Bristol’s natural history filmmakers that this issue must be addressed.[49] As one producer put it:

> we make our living out of wildlife and wild places so it just feels clearer than ever that we have to be better. For myself, personally, and I’m pretty sure lots of other people feel the same way, I’m at a point where I feel that we’re adding to the problem sometimes by filming.
>
> We literally fly somewhere with loads of kit, we film something, we don’t talk about conservation often and then we fly back. It’s extractive filmmaking. We’re literally making the problem worse and we’re not talking about the problems.

The covid-driven use of in-country crews is also helping to shift the somewhat neo-colonial attitudes that inflect how the genre is produced. As one company executive reflected to us:

> I think that we can convince ourselves that nothing really brilliant can happen unless we've got our own people in the field. This has been an opportunity for local crews to demonstrate that isn't necessarily the case. Covid is forcing people to say 'we're not the only people in the whole world who are able to film animals in others people's countries' and just come in with, you know, that sense of superiority. So I think there is perhaps going to be, perhaps, a levelling out of what it means to be a filmmaker working globally and there will need to be slightly less colonial collaboration.

It should also be noted that production companies have economic interests in the use of in-country crew, overseas workers often being cheaper to employ than their UK counterparts. Indeed, in a strange inversion of employment dynamics, one company owner noted that they felt 'exploited' by Indian workers trying to charge higher rates for UK-led productions.

However, while this realisation is good news for the environment and for overseas talent, it is also generating considerable anxiety among established and emerging natural history filmmakers in Bristol, many of whom are understandably concerned about the danger this poses to their own livelihoods. This is clearly a delicate and complex issue for the sector, and we therefore recommend that the sector seeks to address it by exploring ways to mitigate any negative impact on the natural talent pool in the region.

Finally, with production underway again, the bottleneck generated by the lockdown coupled with increased demand for new content has meant that the sector as a whole is 'busier than ever'. Almost every interviewee we spoke to emphasised that the sector was experiencing an unprecedented boom, driven largely by broadcasters, studios and streamers competing for audiences binge-watching during in the pandemic. According to recent research by Ofcom, for example, UK streaming subscriptions increased by some fifty per cent during the pandemic.[50] This obviously welcome news for the sector overall and substantiates what many of our interviewees surmised during the pandemic: that lockdown would not result in an overall loss of income in the production sector, but rather delay it (this is obviously not the case in exhibition, with sector losses there estimated at £2bn).[51] The current boom is also good news for new entrants to the sector. Many interviewees emphasised that there 'had never been a better time to get into the industry' and remarked on the speed with which early career workers were progressing, securing senior roles on productions that would previously have taken many more years to work towards.

However, others sounded notes of caution. Many executives stressed the risks to quality involved in workers being promoted too soon. Furthermore, increased workplace stress was also noted by several people we interviewed. Though we were unable to conduct any detailed studies of the freelance sector for this report, it was clear that the freelance workforce – which bore the financial brunt of the production stoppage – is now facing the opposite problem, struggling to cope with the dangers of the boom in term of stress derived from long hours and pressurized production schedules. One company reported working 'twenty-four seven' to try to cope with the amount of work coming through. While they emphasised that they 'try and give people work-life balance', it was evidently hard to deliver that objective: 'Most people don't even mind working until 8pm, but when it becomes midnight every night …'. Large parts of the screen industry workforce in the city are clearly under significant pressure. Addressing this and finding ways to mitigate it is, we suggest, an urgent priority for the sector. We note that ScreenSkills is currently calling for government-funded expansion of properly resourced production hubs in the nations and regions.[52] We recommend that employers and freelancers in the Bristol region explore how best to liaise with ScreenSkills most effectively to support this effort and secure a properly supported workforce in the future.

Figure 16 A Bristol film crew shooting during COVID-19 © Aspect Film and Video

The big picture: new data on the production sector

The big picture: new data on the production sector

This section of the report explores the size and shape of the screen industries in the region by providing data on several key metrics – the number and type of all the different organisations involved in production; their turnover and employment figures; and the locations of those organisations in Bristol (where the vast majority are based).

Aggregate figures are provided both for the sector overall as well as for the region's seven different screen sub-sectors (see below). We also contextualise this quantitative data with qualitative analysis of how each sub-sector has evolved and illustrate this with reference to various companies operating in the region. However, it is impossible to do justice to such a variety of organisations in a single report. The diversity of the region's production sector is truly astonishing, and we urge to readers to make use of the map and company index at the end of this report to explore this rich production culture in more detail.

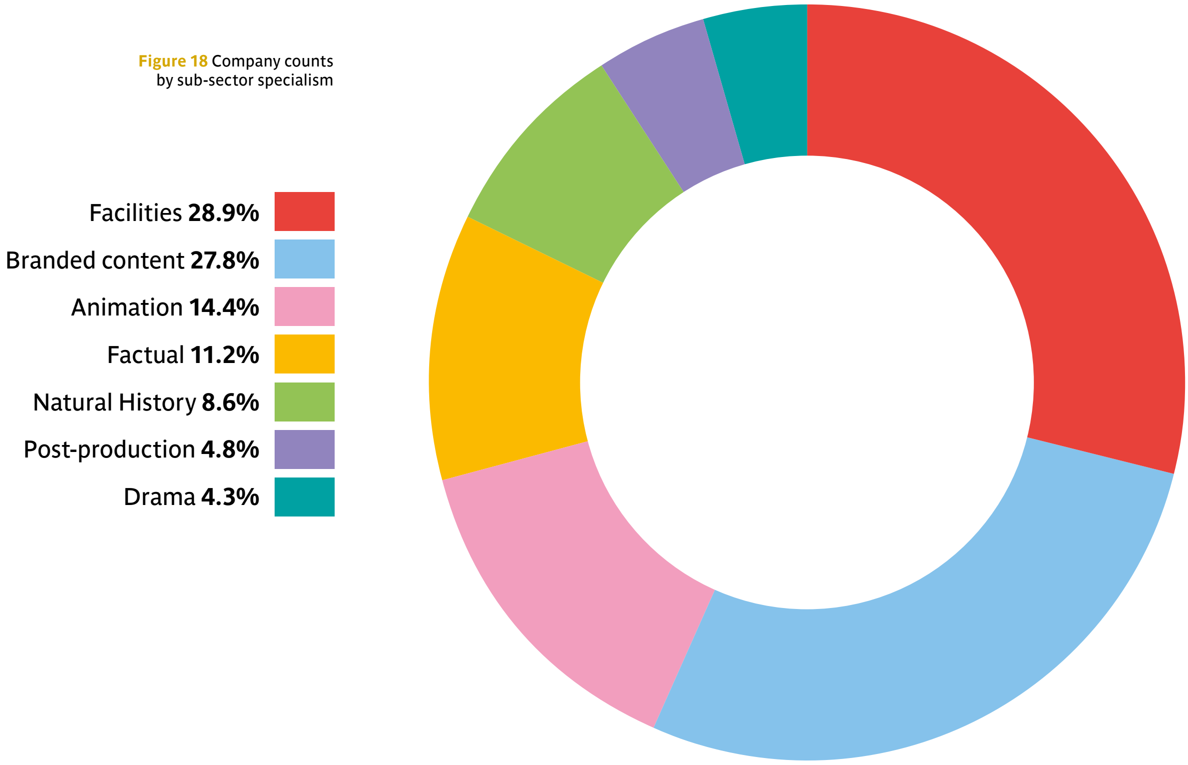
Company numbers

189 companies comprise the independent sector in the Bristol region. These companies can be broken down into seven distinct but often overlapping categories: production companies working across the four major genres in the city – (1) animation, (2) branded content, (3) factual, and (4) natural history; (5) a small but growing number of Bristol-based drama producers; (6) post-production companies; and (7) a whole range of 'facilities' firms that provide vital support services across the sector. These include equipment hire companies (Cine West, Motion Impossible); studio complexes (The Bottle Yard, Band Studios); modelmakers such as Amalgam and Cod Steaks; transport firms (Studio Cars); aerial filming services (Skyhook Media, Bailey Balloons); make-up artists (The Makeup Kit); and talent agencies such as Jo Sarsby and BAM Associates. (See the company index and map at the back of this report for the full listing of all companies in the sector).

Figure 17 *The Mating Game* (2021) © Silverback Films

Of course, many companies work across several genres, which makes categorisation a difficult and sometimes subjective process. We have defined Plimsoll as a natural history company for the purposes of our company count, for example, but it also produces a great deal of factual television. Companies such as Aspect, BDH, Buckloop, Hello Charlie, Nymbl or Rubber Republic – to name just six – operate at the intersection of animation, motion graphics, visual effects and, increasingly, Virtual Reality (VR). These firms sometimes work on broadcast commissions as well as for corporate clients, and are hardly captured by the term, 'branded content'. Nevertheless, despite the sometimes blurred boundaries between them, clear constellations of firms remain in each of the screen sectors explored in this report.

Figure 18 Company counts by sub-sector specialism



In terms of the company count, as shown in fig. 18, the facilities sub-sector represents the largest number of companies in the region (fifty-four). Among production companies, branded content is the largest sub-sector (with fifty-two companies), followed by animation (twenty-seven companies), factual (twenty-two), natural history (seventeen) and drama (eight). With nine companies, the post-production sub-sector is marginally bigger than drama, but generates a significantly larger turnover.

As shown below, the number of companies in a given sub-sector is not necessarily proportionate to the amount of turnover that cluster generates, and company counts often have an inverse relationship to turnover and employment. Thus, although branded content companies constitute the largest sub-sector in terms of company numbers, it is among the smallest when it comes to turnover and employment. This is to be expected given the large number of micro businesses and start-ups operating in this sub-sector in particular. Indeed, as elsewhere in the creative industries, most companies operating in the Bristol region – regardless of sub-sector – are officially defined as small and micro entities by HMRC. Such firms typically turnover less than £10m and have fewer than fifty employees (small), or turnover less than £632,000 and have 10 employees or fewer (micro). As shown in fig. 19, almost all companies in the region turnover less than £10m, while 64.6 per cent of firms turnover less than £500,000.[53]

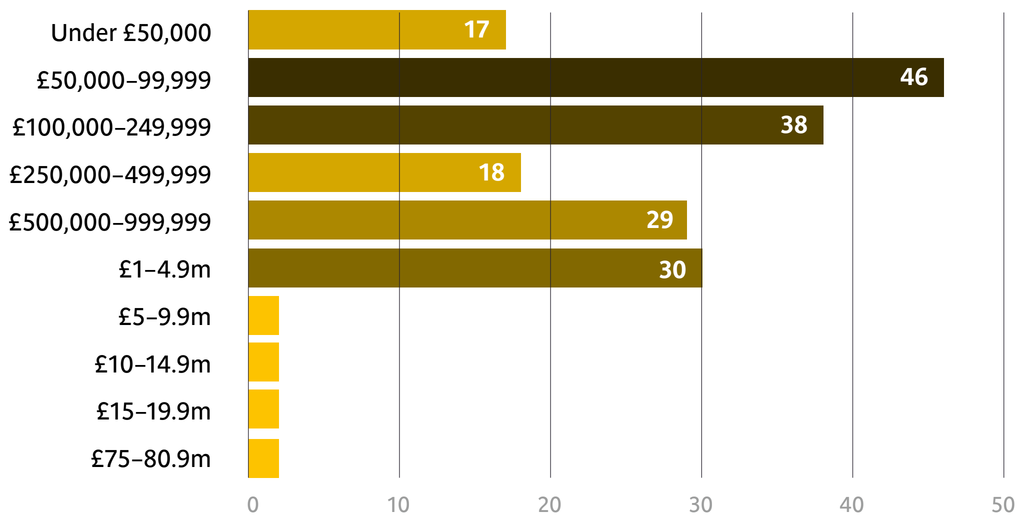


Figure 19 Turnover bands

Aggregate turnover increased from £147.7m to £288m = 105%.

Company numbers increased from 131 to 189.

Turnover

Including BBC Studios, the overall aggregate turnover of the sector was £288m, up £147.7m from our previous study in which 131 independent companies generated £140.3m. This represents an impressive growth rate of some 105 per cent). As shown in fig. 20, by far the largest proportion of this aggregate turnover – £127.2m, or forty-four per cent – was generated by the seventeen natural history production companies in the city. Facilities is the second largest sub-sector by turnover (£40.4m, 14.0 per cent). While it includes a large number of small firms and is among the lowest in terms of employment figures (see below), the high turnover is explained by the presence of a few larger firms, such as The Bottle Yard Studios or equipment and services companies such as CineWest and Location One.

The third largest sub-sector in terms of turnover was factual (£35.9m, 12.5 per cent), followed by animation (£33.6m, 11.7 per cent), branded content (£27.1m, 9.4 per cent), post-production (£21.8m, 7.6 per cent) and drama (£2m, 0.7 per cent).[54]

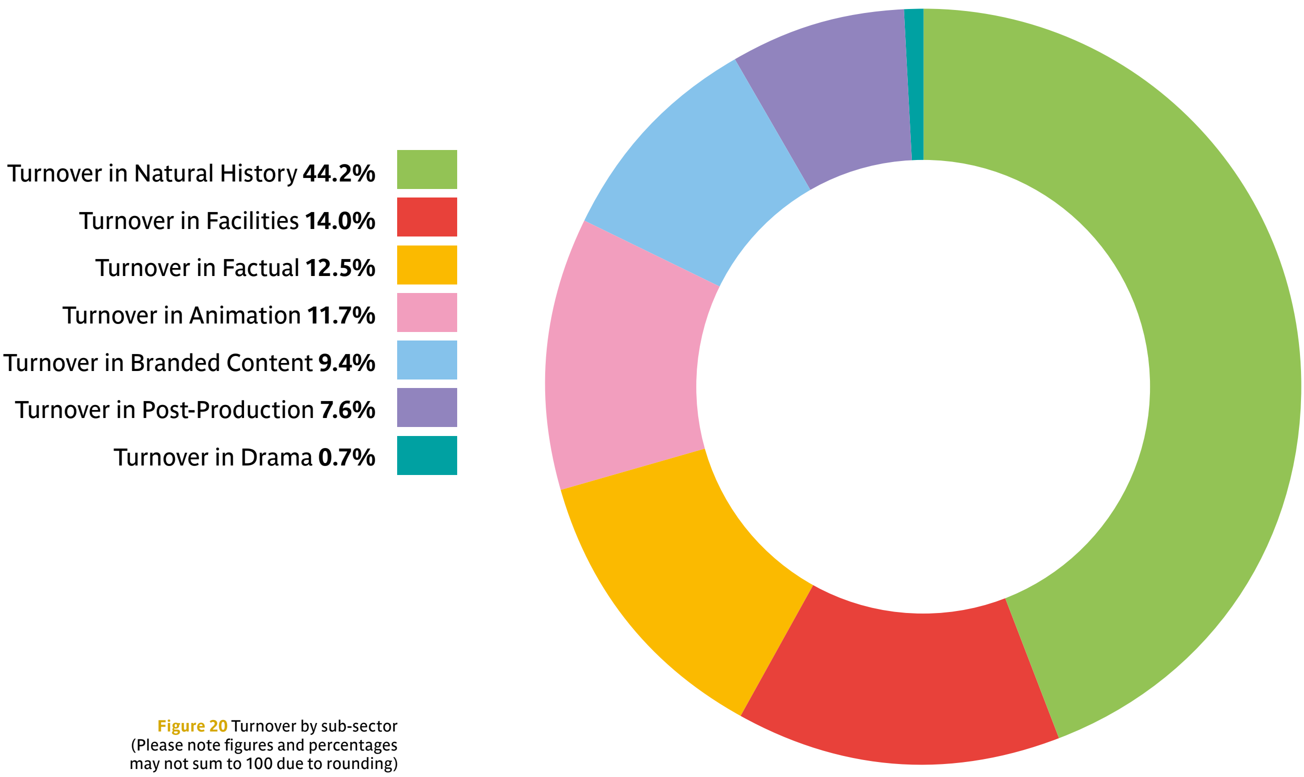


Figure 20 Turnover by sub-sector (Please note figures and percentages may not sum to 100 due to rounding)

Employment figures

Measuring employment in the production sector is extremely difficult because of the extent to which the industry depends on often rapidly fluctuating levels of freelance labour. In Bristol, for example, Aardman employs 150 FTE staff, but this expands to almost 600 when the company brings in freelancers to work on its major productions. Similarly, much of the work of BBC Studios is seasonal – indeed the only year-round BBC Studios productions in Bristol are *Countryfile* and *See Hear*. Consequently, there are just five year-round staff for *Chelsea Flower Show*, for example, but this then expands to more than 100 when the show is in production in late spring and early summer. The BBC confirmed that it still employs approximately 1,000 FTE staff in Bristol but these are now split across BBC Studios and public service, with Studios housing 350 staff at the NHU and 150 in the Factual Entertainment team.

According to the data provided to us in 2017, the sector employed approximately 2,200 FTE staff – 1,200 in the independent sector and 1,000 at BBC Bristol. The freelance pool serving both independent companies and the BBC was estimated at 1,500 workers. Data provided to us by independent companies and the BBC for this report suggests the sector now employs approximately 2,760 FTE staff (a growth rate of some 25.45 per cent). Judging from the growth rate of FTE employees and recent industry estimates that suggest freelancers comprise up to 90 per cent of the total workforce, we suggest the freelance pool in the region consists of approximately 1,950 to 2,500 workers.[55] However, we stress that tracking numbers of freelancers in a given region is notoriously difficult, and this should be subject to further investigation (see recommendations).

Full time staff in Bristol's screen sector up from 2,200 to 2,760, an increase of 25.45%.

Freelance numbers up from 1,500 to approximately 2,500.

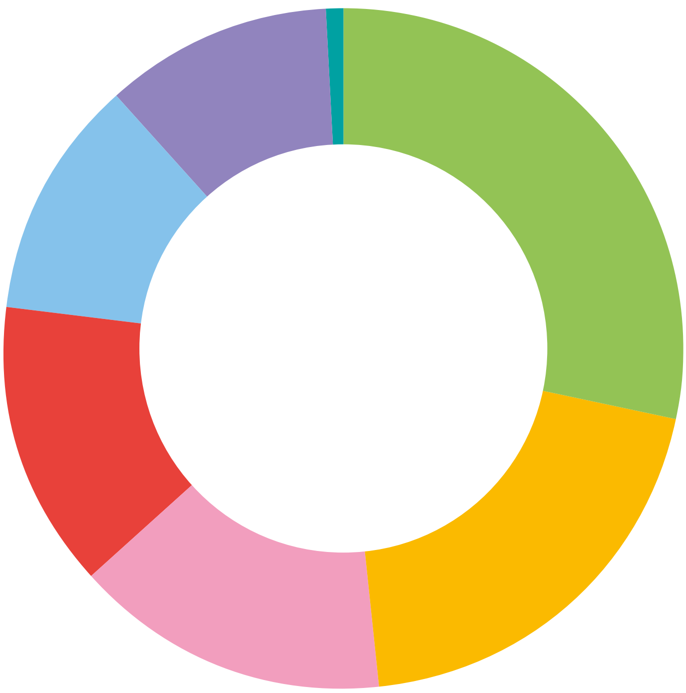


Figure 21 Employment by sub-sector (Please note figures and percentages may not sum to 100 due to rounding)

- FTE in Natural History **28.5%**
- FTE in Factual **20.1%**
- FTE in Animation **14.9%**
- FTE in Facilities **13.8%**
- FTE in Branded Content **11.4%**
- FTE in Post-Production **10.6%**
- FTE in Drama **0.8%**

In terms of the breakdown of FTE staff employed in the region's different sub-sectors (see fig. 21), this largely corresponds to figures for turnover. The genres that are the two biggest earners in the region, natural history and factual, also emerge as the biggest employers, with natural history accounting for 28.5 per cent of the total FTE staff, and factual accounting for 20.1 per cent. The region's animation and facilities companies employ 14.9 per cent and 13.8 per cent respectively, followed by 11.4 per cent in branded content and 10.6 per cent in post-production.

Inward investment

Every year the Bristol Film Office calculates the inward investment (as well as the number of productions and filming days) generated by film and television production in the region. 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, is calculated using Creative England's Average Spend Figures for different levels of production budgets. By combining Bristol and Bath inward investment figures with the aggregate turnover, we can estimate the economic value of the sector as approximately £306m.

As shown in fig. 22, inward investment generated £15.2m in 2017–18, £16m in 2018–19, £17.1m in 2019–20 and £12.6m in 2020–21 (for inward investment data from 2007–2017, see our previous report, p. 21). The decline in inward investment in 2020–21 reflects the impact of COVID-19 on the production sector. Because our data on turnover was mostly collected prior to or during the pandemic, the 2019–20 inward investment figure is the closest comparable figure. In Bath, screen sector inward investment hovers at around £1m.

Figure 22 Inward investment from productions facilitated by Bristol Film Office and The Bottle Yard Studios

Date	Inward investment value
2020/21	£12,609,250
2019/20	£17,057,000
2018/19	£16,000,000
2017/18	£15,200,000
2016/17	£18,354,000

New companies

New companies have been established in every sub-sector. The largest growth genre by this metric was factual, with thirteen new companies formed since 2017. These include Bone Soup Productions, set-up by former Love Productions executive, Richard Bowron; Blak Wave Productions, run by Michael Jenkins and Somina Fombo (profiled on p. 38), and Five Mile Films, which is led by the former Head of Documentaries at Channel 4, Nick Mirsky (*24 Hours in A&E*; *Hunted*) – and which was the first indie in Bristol to receive investment from Channel 4's Indie Growth Fund. Natural history is another major growth genre with eight new firms – include True to Nature, the indie set-up by former NHU-head Wendy Darke (profiled on p. 70), Rebel Television, a children's-oriented firm that promotes itself as 'the antidote to natural history TV'; and Wild Space, the indie formed by James Honeyborne in 2019 to produce natural history content exclusively for Netflix (profiled below). (For more information on the new companies in the city, what they do and where they are based, see the company listings in the back of this report).

WILD SPACE PRODUCTIONS

One of several new indies in Bristol's natural history sub-sector, Wild Space is unique in that its founder, James Honeyborne, has secured a multi-year deal with Netflix to produce nature and science films and series exclusively for the world's leading streaming platform. Honeyborne and his partner, Renée Godfrey, develop Wild Space's content through their production company, Freeborne Media Ltd. While Wild Space's relationship with Netflix is unique to Bristol, this does not preclude Netflix from working with Bristol's other natural history companies, many of which – Humble Bee, Silverback, True to Nature and others – continue to secure Netflix commissions for their own projects. As with other natural history indies in the city, both Godfrey and Honeyborne worked with the NHU prior to setting up their own company. Godfrey trained as an anthropologist before working on the acclaimed series *Tribe* (2005–7) and *Human Planet* (2011). Honeyborne, meanwhile, trained as a biologist and oversaw the production of some thirty-five NHU productions during an esteemed career as an executive producer, including *Big Blue Live* (2015) and *Blue Planet II* (2017).

Figure 23 *Bait* (2019); Courtesy of Early Day Films

Bristol's emergent drama sector

In 2017, we discussed the absence of drama production in Bristol and the ways in which this limited the size and variety of the city's production ecology. Although The Bottle Yard Studios (TBYS) attracts a wide range of drama productions they are nevertheless produced by companies based outside Bristol (see our discussion of TBYS below, pp. 82–5). However, there are signs that this is changing. Bristol is now home to a small but growing cluster of drama companies. For example, Blak Wave is developing fiction projects and in 2021 released its first BFI-funded short, *Pickney* (Michael Jenkins). Indefinite Films was set-up by experienced drama filmmakers, Bruce Goodison and Kate Cook, and in 2020 received funding from Channel 4's Emerging Indie Fund to develop a slate of drama projects. Hummingbird Films, led by former *Casualty* producer Jayne Chard, has expanded its focus from documentary to feature film and in October 2020 won a Business Development Grant from Creative England to move into television drama.

Meanwhile, Kate Byers and Linn Waite's Early Day Films released Mark Jenkin's extraordinary debut feature film, *Bait*, in 2019 to widespread critical acclaim in 2019. Early Day has since received a BFI Vision Award – a scheme designed to support quality emerging film production companies – and been named a CE50 company by Creative England, an annual recognition of the fifty most exciting creative companies in the UK. The growing community of drama producers in Bristol has also recently formed its own alliance and advocacy group, Bristol Screen Producers, which aims to foster the development of drama production in the city. We look forward to exploring this emerging sub-sector in more detail in subsequent editions of *Go West!*. Below, we focus on the region's six more established sub-sectors: natural history, animation, factual, post-production, branded content and facilities.

EARLY DAY FILMS

Early Day Films is a feature film production company set up by Linn Waite and Kate Byers in 2009. Although from different professional backgrounds – Waite used to occupy management roles organizing expeditions, whilst Byers had a successful career as a stage & screen actor – what connected the two was the desire to make feature films with distinctively regional, compelling narratives. They were also convinced that they need to be involved in every step of the process: from initial planning, through production, to marketing and distribution. Waite moved to Bristol from Derbyshire in the early 2000s, attracted by the city's vibrant short-film scene. Byers lived in London, but had familial ties to Bristol, and always considered it home: 'I guess being in Bristol gave us a sense of doing it for ourselves really, and building our business within the South West'. Early Days' first feature-length drama, *Bait* (2019), directed by Mark Jenkin, was released to widespread critical acclaim, winning a BAFTA for Outstanding Debut, a BAFTA nomination for Outstanding British Film and winning a BIFA Breakthrough Producer award. The duo are also recipients of the prestigious 2020 Vision Award, sponsored by the British Film Institute, which provides funding of up to £2.5 million to the UK's 'most exciting and ambitious producers'.

Figure 24
Poster for *Bait* (2019)

Bristol's sub-sector specialisms

As discussed in the section on the evolution of its screen industries, Bristol's strengths in natural history, factual, animation, and post-production originally developed because of the BBC and Aardman acting as the creative anchors of their respective sub-sectors (and, as noted on p. 24, Aardman set up in Bristol in the mid-1970s because of its relationship with the BBC). The natural history and factual sub-sectors developed around the NHU and other departments based at BBC Bristol, while Aardman's growth seeded the animation grouping initially around its Spike Island dockside base. The expanding production of these genres in turn supported the growth of Bristol's small but essential post-production sub-sector. Much of the city's facilities and branded content sub-sectors then developed as a result of the combined size and gravitational pull of Bristol as a regional and national production hub.

Natural history

Bristol has become the global centre for natural history filmmaking, producing about one third of all natural history films worldwide.[56] Because of its significance, this revised edition of *Go West!* includes an expanded section on Bristol's natural history sub-sector (pp. 68–77), but we give a brief overview here. As noted above, the principal building block is BBC Studios' Natural History Unit (NHU), which remains the 'anchor firm' within a constellation of 16 other independent production companies that together comprise Bristol's 'Green Hollywood'.[57] Many of Bristol's natural history companies have been established by former NHU executives, including Silverback Films (Alastair Fothergill and Keith Scholey), True to Nature (Wendy Darke) and Wild Space (James Honeyborne). Being concentrated in Bristol gives each company a significant advantage over competitors based elsewhere, largely through its unrivalled pool of experienced creative talent. As explained by Grant Mansfield, the founder and chief executive of Plimsoll Productions (the president of which, Andrew Jackson, also led the NHU): 'the truth is that most of the world's best wildlife film makers live and work in this city'.[58]

SILVERBACK FILMS

Silverback Films was established 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 accepting an executive role in the BBC, to be independent, and to make programmes that deal with conservation issues with significantly more creative control than they had experienced hitherto. Silverback specialises in the production of high end ('blue chip') wildlife films for both television and cinema. Its work includes, for example, *The Hunt* (2015), a seven-part series for the BBC; *Our Planet* (2019), an eight-part series for Netflix produced in partnership with the World Wildlife Fund; and *A Perfect Planet* (2021), for Discovery and the BBC. Silverback also made the Scholey-directed feature film, *David Attenborough: A Life on Our Planet* – that had a brief (one week) cinema release before it was hosted by Netflix from 4 October 2020 – in which the 94 year-old naturalist reflected on the devastating impact of humans on the planet and what can be done to prevent further catastrophic change. In *Breaking Boundaries: The Science of Our Planet*, released on Netflix in June 2021, Attenborough and Johan Rockström, Director of the Potsdam Institute for Climate Impact Research, present the scientific evidence for climate change. In this way, Silverback is representative of the increasing number of wildlife production companies that are making films which emphasise the environmental crisis and which seek to be a genuine force for change. The company also illustrates developments in the UK television industry in that it is increasingly internationally-oriented: only four per cent of its revenue comes from the UK and Los Angeles is a more important commissioning centre for Silverback than London. Equally typical was the company's acquisition by All3Media, announced in December 2020, which exemplifies the trend for smaller independent companies to be bought by 'super-indies'.

Figure 25 'Frozen Worlds' episode of *Our Planet* (2019); © Silverback Films

Animation

By the early 2000s, Aardman had developed into a major international production company. Because Aardman chose to remain in Bristol rather than relocate to London or even overseas, it has attracted a major influx of creative talent into the city that has developed into a distinct sub-sector, with a whole range of companies working across the advertising, film, television, and VFX sectors. The region currently consists of twenty-seven companies that specialise in animation. Two of these are based in Bath (Funko Animation Studios and Island Monkey), but most are located in central Bristol. Some companies are concentrated on the docklands near Aardman itself, such as Green Ginger, the long-standing puppetry and effects company, or the 3D animation and motion graphics studio Ocula. Others are based around Old Market (A Productions, Shy Guys Studios), Park Street (Gutsy Animation, Kiss My Pixel, Jelly Television), or at Paintworks, the 'creative quarter' on the east of the city (Group of Seven, Studio Giggle, Sun and Moon Studios).

The animation sub-sector also has generated its own institutions, including Skwigly, the longest-running animation magazine and associated community in the UK, which publishes a wide range of news, interviews, podcasts and tutorials as well as providing listings for events and animation courses at UK universities. As with the natural history sub-sector, although animation companies are no longer dependent on Aardman, it continues to be a major magnet for animation talent to the city and the companies in the sub-sector continue to share freelance talent. Of all the city's sub-sectors, animation may be hardest hit by the immigration challenges caused by Brexit. As one leading company put it to us: 'we always have very international teams on our productions, and that's going to be much, much harder … people are not going to be willing to uproot their lives and come here because it's harder and they don't feel welcome – it's a real problem.'

Figure 26 *Dodo* (2021) animated children's series; © Wildseed Studios

WILDSEED STUDIOS

Wildseed Studios was founded in April 2013 by Miles Bullough – formerly Head of Broadcast at Aardman – and Jesse Cleverly, a former executive producer at the BBC. The company focuses on live action and animation for older children and young adults. Wildseed's mission is to develop and invest in new and emerging creators, and twice a year the company actively solicits material from new talent via its online submission portal. The top three projects from each round of submissions receive mentoring and development support from Wildseed, with a view to progressing the project to a level at which it can be pitched to a commissioner. Since its inception, Wildseed has worked predominantly with streamers rather than traditional broadcasters. Cleverly believes that investing in young creatives, who reflect their audience, is key to creating compelling, successful stories; Bullough emphasizes that being located in Bristol's thriving animation sector helps Wildseed to attract the best international talent: 'Bristol is often a really big draw for people, because it's a fantastic city and people love coming here'. Recent work includes *The Last Bus* (2021), a ten-part series for Netflix with the participation of two Wildseed mentees, Paul Neafcy (Head Writer) and Drew Casson (Episode Director); and *Dodo* (2021), a twenty-episode series for Sky Kids by Jack Bennett, who began working with Wildseed while still in his final year at university.

Factual

As with natural history and post-production, Bristol's factual sub-sector has grown up around the BBC Bristol's historical base in Clifton on Whiteladies Road. Today, although factual companies are to be found throughout the city centre, the majority remain concentrated in Clifton. These include new firms like Bone Soup, Five Mile Films and Mustang Films as well as more long-standing factual indies such as Drummer TV, Keo West, Love Productions, Quickfire Media and RDF West. Bristol's factual companies often developed from the natural history sub-sector and have prospered by diversifying into factual – Icon Films and Plimsoll are good examples of this trend, as is Hungry Gap, the new firm set up by former Tigress executive, Pete Lawrence. A notable exception to this trend is Testimony Films which was, along with Available Light and Quintessence, one of the first factual producers in Bristol not to focus on natural history (Available Light and Quintessence are no longer operating). Because factual is a genre with broad audience appeal that lends itself to potentially lucrative formats, companies in this sub-sector are among the most likely to be acquired by larger super indies. Love Productions is owned by Sky, for example, and RDF by Banijay Group.

DRUMMER TV

Established in 2012 by Tamsin Summers and Rachel Drummond-Hay, Drummer TV is one of the few production companies in the UK owned exclusively by women. Before moving to Bristol, Summers had a career as an executive producer and commissioning executive in London, whereas Drummond-Hay has been in the city since the late 1980s working as a freelance producer in film, TV and commercials. The duo feel particularly strongly about supporting the local filmmaking community, particularly when it comes to investing into new, diverse talent. Both Drummond-Hay and Summers acted as mentors to Michael Jenkins and Dr Mena Fombo, bringing them together and offering support so that they could establish their own company, Blak Wave. Michaela King, winner of the RTS 'Rising Star' award, came to Drummer on a work placement when she was still a student; and Abdimalik Abdullahi is now Drummer's first technical apprentice, initially coming on a school work experience week aged 16. Drummer TV is part of the Cultural Diversity Network, which is committed to promoting accurate and up-to-date information about cultural diversity and prides itself on the diversity of its workforce, 20 per cent of which are from ethnic minorities and 20 per cent are D/deaf or disabled. The company has made several programmes for the British Sign Language Broadcasting Trust (BSLBT), including RTS winner *I Want to Change the World* (2020) and MIPCOM International Diversity Award winner *Summer of Lockdown* (2021). Although the range of Drummer TV's work is wide, working with a variety of broadcasters in the UK and internationally, it specializes in 'accessing people living on the periphery and immersing in their worlds', including *Circus Kids* (2017) for Channel 5 and BAFTA-winning *Mumbai Street Strikers* (2018) and *Boy on the Bicycle* (2016) for CBBC. Projects currently in production include: *Get Britain Working* (working title) a three-part series for Channel 4, *Sign to Win*, the world's first Game Show in BSL for the BSLBT, and *Gym Stars Series 4* for CBBC.

Figure 27 *I Want to Change the World* (2022) © Drummer TV

Figure 28
Life of Dogs (2015)
© Plimsoll Productions

PLIMSOLL PRODUCTIONS

Plimsoll Productions was founded in September 2013 by Bristol-born Grant Mansfield, who started in the BBC as a documentary producer before working in Los Angeles as CEO of Zodiak USA, then Managing Director of RDF and Head of Programmes at Granada. He is assisted by Andrew Jackson as President of International Productions and Development, an ex-Head of the NHU before working as Managing Director of Tigress until 2011. Plimsoll has grown rapidly to become a medium-sized company that now employs around 400 staff across all its offices (in Cardiff and LA as well as Bristol), making it the biggest independent media production company outside London and the UK's third largest 'true indie', i.e. one not owned by a larger corporation. Plimsoll's deal with LDC, the equity investment arm of Lloyds Bank, in August 2019, provided financial investment and advice without interfering with Plimsoll's creative policies and strategies. These are focused through a number of 'business-winning execs' who have shares in the company and whose function is to sell content to the UK PSBs and foreign, mainly US, broadcasters and SVODs – three-quarters of Plimsoll's commissions are from American companies; in spring 2015 it opened an office in Los Angeles. Plimsoll also has an office in Cardiff in order to take advantage of Welsh government commissioning quotas. Plimsoll prefers to make formats rather than single programmes, accruing its major revenue from distributing and selling the rights to more than fifty countries through Magnify Media, in which it holds a significant stake. Plimsoll's outputs range from natural history productions such as *Hostile Planet* (2019) or *Wales: Land of the Wild* (2019–20), to factual programmes such as *The Real Peaky Blinders* (2019) or *Britain's Parking Hell* (2018–). Plimsoll intends to continue expanding but is committed to remaining in Bristol because of the 'fantastic wealth of talent in the city'. Mansfield was also a key protagonist in shaping Bristol City Council's bid for Channel 4.

Figure 29 Offline Suite Films@59 © Films@59

Post-production

The region's post-production sub-sector has also expanded since our last report, with nine firms now active in it. Films@59 and Wounded Buffalo are the most long-standing of the current post-production firms in the region, having set-up in 1990 and 1991 respectively. Bristol's post-production sub-sector expanded in the 2000s, with Big Bang and Doghouse Post Production both opening in 2004. The Farm West, a regional office of the multinational post-production business, The Farm Group, also moved to the city in 2004 to work on the Endemol (now Banijay) production, *Deal or No Deal* (2005–2016), which relocated from the former Endemol West Studios at Paintworks to The Bottle Yard Studios in 2013. Competition in this sector intensified further in 2014 when Evolutions Bristol – the regional office of the London-based firm – opened an office in the city and acquired Big Bang. Audio Uproar, which comprised Big Bang's audio department despite being a separate business entity, has since operated independently and, along with Wounded Buffalo, is a key facet of the city's audio post-production services. New firms include Luminosity Post Production – also based at The Bottle Yard and run by long-standing BBC Bristol staffer, Chas Francis – and nineteentwenty, another London-based firm (established in 2013) that opened a Bristol office in 2017 at the former HTV headquarters on Bath Road. However, most firms in this sub-sector – Audio Uproar, Doghouse, Evolutions, Films@59, The Farm, We Are Audio – are still based on or around Whiteladies Road in Clifton, which reflects the sub-sector's foundational relationship with the BBC and the natural history sector.

FILMS@59

Films@59 was formed in 1990 from the ashes of two 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. Its founders were Gina Fucci, Jim Guthrie and Jean Thompson. Fucci moved to Bristol from New York City in her early twenties having learned skills from her father, an editor of Broadway commercials. Guthrie and Thompson were ex-BBC employees who relocated to Bristol when the BBC shifted some drama production, notably *Only Fools and Horses*, to the South West. 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. Following an increase in business after 2016 – although commissions from the BBC went down this was more than offset by those from streaming platforms – Films@59 has expanded, investing in additional editing suites and cutting rooms, and employing more staff. Based in Clifton, the company has a location kit rental on an industrial estate in Cardiff and one in Brockley near Backwell on the way to Bristol Airport. Films@59 has always tried to work 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. Although Films@59, like all Bristol-based companies, still struggles with the prejudice that the best talent resides in London, it has confidence in the city's future as a significant centre for screen production.

Figure 30 Films@59 editing suite; © Films@59

Branded content

Branded content firms, which are sometimes referred to simply as 'content creators' or corporate video producers, specialise in the production of non-broadcast films for a range of clients and platforms. Given the high demand for non-broadcast content and the fact that this is a relatively accessible genre in which to begin working, it is no surprise that the branded content sub-sector is by far the largest in the region in terms of the number of companies involved. The branded content sub-sector is also, therefore, extraordinarily varied. Companies range from small, boutique studios employing a handful of staff, such as Jooka, Mother Goose Films and Vanilla Bear, to established agencies with a large range of corporate and public sector clients (and often a correspondingly larger staff base). Companies at this end of the spectrum include Aspect Film and Video (see below), Blaze Productions, Happy Hour Productions, and Hello Charlie, many of which also have offices in London or elsewhere. Because of its size and diversity, the branded content sub-sector includes firms with a wide range of business strategies and specialisms. Buckloop, for instance, specialises in live visuals, events and music videos as well as commercials, while Brightworks Media focuses on corporate training and conference videos. Others specialise in animated content, CGI and VFX or even VR work, such as 422 South, Giggle Group or Owl VR. Some companies appeal squarely to brand development – 'building brands through film' (Huxley) – while others combine a similar focus with a more ethical or environmental approach, such as Omni Productions, Relevant Films, Rubber Republic, Skylark and Tusko. Because it includes a relatively large number of start-ups, company churn in the branded content sub-sector is also fairly high. Since our last report, companies including Pixillion, Snowline Productions, Dragon Fire Films and The White Balance Imaging, for example, have ceased, and a whole range of new and exciting firms have begun operating. See, for example, the extraordinary variety and quality of films made by companies such as Blue Sky, Clockwise Media/Mother Goose Films, Eyes Up Films, Gate Films, Innov8 Films, Lacuna Productions, Under the Wing Productions and Wild Rice Films.

Figure 31 Showreel still
© Aspect Film and Video

ASPECT FILM & VIDEO

Aspect is a content agency that produces promotional films for a wide range of companies and brands, including Instax, Marriott hotels, Pukka, Sony, North Face and Etihad airlines. In addition to providing various services – from live action, 2D/3D animation to drone filming – Aspect designs video-based, promotional campaigns to maximize the reach of its clients' content. Founded in 2007, Aspect's main studio is located in Clifton, just off Whiteladies Road. This is where the company has its production base, as well as its creative and post-production teams. Another office – at Soho Square in London – is used primarily as a commercial space for meetings with London-based clients. Aspect continues to be embedded firmly in Bristol's film production scene, working with local universities, Ted Bristol and Bristol Creative Industries.

Facilities

The facilities sub-sector is the largest in the region and arguably the most significant in that the companies in this category collectively provide the infrastructure on which many of the other firms in the city depend, and which is also responsible for attracting much of Bristol's screen sector inward investment. Studio spaces and associated support services constitute a significant part of the facilities sub-sector. Support services include plant hire companies, set builders (Set Smith), grip services (Eyelights), scenery and prop firms (Props Ink, Flat Earth Scenery), and casting agents (Briz Kidz, Phoenix Casting). Of the region's studios, The Bottle Yard is by far the largest, yet other significant studio spaces include Band Studios in Brislington and Qu Studios in Bedminster, as well as Bristol's own virtual production studio, Vero. Other companies in the facilities sub-sector specialise in audio design (Radium, Echoic Audio), aerial filming (Skyhook Media), time-lapse services (Interval Films, Lobster Pictures), special and visual effects (Illuminarium, Moonraker) or modelmaking (see profile of Amalgam below). As this suggests, like the branded content cluster, the facilities category includes an astonishing range of firms that span a very wide range of activities.

AMALGAM MODELMAKING

Amalgam was formed in Bristol in 1984, originally as an architectural model maker. The company continues to work with the architecture industry as well as clients from myriad other industries – educational providers, engineers, museums and visitor centres, renewable energy providers and more – as well as the screen sector in Bristol and nationally. Today, Amalgam's services for the screen sector range from prop-making to sculpture, scenery and set-building. The company also provides SFX items for animation and live action – such as the Dino Clock in the BBC series, *Andy's Dinosaur Adventures* – as well as specialist cameras and animatronics for wildlife films, and its work has featured on *Casualty*, *Dr Who*, *Red Dwarf, War of the Worlds* and *Sex Education*, among others. In 2018, Amalgam was commissioned to make more than sixty models of Aardman's award-winning character Gromit, for the 'Gromit Unleased 2' sculpture trail, which saw the models positioned across many of Bristol's most iconic locations and which raised over £2m for the Bristol Children's Hospital. With an annual turnover of around £2m and between 35 to 45 employees, Amalgam is among the biggest firms working in the facilities sub-sector.

Figure 32 One of the Gromit models; Courtesy of Amalgam Modelmaking

Natural history filmmaking:
The ‘Green Hollywood’

Natural history filmmaking: The 'Green Hollywood'

As noted, Bristol has become the global centre for natural history filmmaking: a 'Green Hollywood'. With natural history tariffs spanning £200,000 to £3m per hour for high-end 'blue chip' content and averaging £1m per hour, one recent estimate suggested there was £150m-worth of Bristol-based natural history production underway in early 2020.[59] Natural history filmmakers were initially very tightly located around the BBC's studios on Whiteladies Road. However, as discussed below, over time, they have become much more internationally oriented and less dependent on the NHU, which has become one significant player in an expanded global market. Although the NHU and the other natural history companies compete for commissions, their relationship remains one of interdependence and mutual support, 'a natural history fraternity', as one senior executive put it to us. It is a fraternity that relies on one another's successes 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.

Almost all the natural history companies now work with national and overseas broadcasters such as Animal Planet (owned by Discovery, which recently merged with WarnerMedia) or National Geographic (owned by Disney). In order to sustain the production levels and quality of its 'blue chip' wildlife programmes, the NHU itself has to co-produce with a range of global companies. *Seven Worlds, One Planet* (2019), for instance, was co-produced by BBC Studios, BBC America (a cable channel owned jointly by the BBC and the American entertainment company AMC Networks), two European broadcasters (ZDF and France Télévisions) and Tencent, the Chinese multinational conglomerate.

In addition to this sub-sector's increasingly international focus, the other major change since our 2017 report is the impact of the Subscription Video on Demand (SVOD) streaming platforms. The SVODs have very deep pockets – Netflix, for instance, has an annual production budget of £10.3 billion compared to the BBC's £2.3 billion – which makes them the 'new King Kongs' of the screen media landscape.[60] The CEOs of the natural history companies we interviewed were united in identifying the SVODs' transformational impact. Because of its appeal to both family and more specialist audiences, as well as its long shelf life, global appeal and ability to bypass language barriers, the SVODs believe that natural history programmes are an important way of expanding their subscriber base. They have therefore been prepared to invest significantly not only in acquiring previously produced programmes but also commissioning their own original productions. Silverback, for instance, was commissioned by Netflix to produce *Our Planet* (2019). Narrated by David Attenborough, *Our Planet*'s exceptional production values match any of the NHU's 'landmark' co-productions but it was financed entirely by the LA-based streaming service. As a result of these kinds of interventions, the SVODs have increased significantly both the number of natural history commissions for Bristol-based companies and the size of the budgets, creating a 'boom period' or 'golden age' across the sub-sector.

TRUE TO NATURE

True to Nature was established in June 2016 by Dr Wendy Darke, a former Head of the BBC Natural History Unit. During her time at the NHU – a career spanning twenty-five years – Dr Darke was responsible for overseeing the development and delivery of over 1,000 programmes, including BBC landmarks such as *Planet Earth II* (2016), *Blue Planet II* (2017), and *Seven Worlds, One Planet* (2019). Dr Darke was motivated to establish an independent production company with innovation and conservation at its heart, with the editorial ambition and commercials working hand-in-hand with great story-telling that creates life-long relationships between people and nature: 'I feel proud of what I have achieved to date, but I still think there is a long way to go in our industry, in engaging audiences of all ages, both in the UK and worldwide.'

Specializing in wildlife programming, True to Nature has grown exponentially, securing over 19 commissions and 206 programmes between 2016 and 2021, many of which have reached global audiences in 160 territories. One of its flagship productions is *Shark with Steve Backshall* (4 x 60', 2021) for Sky Nature and, building on the success of series one, a second series of *Expedition with Steve Backshall* (6 x 60', 2021) has been delivered to global audiences. Other productions include *Gangs of Baboon Falls* (5 x 60', 2021), which builds upon the success of *Gangs of Lemur Island* (5' x 60', 2020), both of which premiered on Sky Nature. For the younger audience, *Garden Tales* (26 x 7', 2021) and *One Zoo Three* (26 x 22', 2022) have been commissioned by CBeebies and CBBC respectively.

Figure 33 *Planet of Volcanoes* (2019) © True to Nature

Although declining habitats and endangered species have been a feature of natural history programming almost from its inception, this commercial expansion in production has been accompanied by an increased ethical self-consciousness both in the changing content of the natural history programmes and the ways in which they are made. The strapline of *Our Planet*, for example, urges audiences to 'experience our planet's natural beauty and examine how climate change impacts all living creatures in this ambitious documentary of spectacular scope'. This kind of framing combines the genre's traditional pleasures and audience appeal with the globalised threat of mass extinction. Morgan Richards has suggested that these 'green chip' programmes, which foreground not animal behaviour but environmental issues, began to emerge around the start of the millennium with films such as *Saving Planet Earth* (BBC, 2003). This trend has arguably become more explicit since then, however, with those films that do address environmental issues often focusing on the specific ecological impacts of climate change.[61] One company leader characterised this change as the shift from an 'add-on', often in the closing sequence or perhaps the final programme, to a conception in which environmental threat is 'designed in' to the fabric and direction of the whole series. Yet, as is clear from our case-study of Filmmakers for Future: Wildlife (FF: W) (see pp. 74–7), the representation of the existential threat climate change poses to humankind remains a significant issue for the industry.

Figure 34 *Shark with Steve Backshall* (2021) © True to Nature

Partly as a result of the work of groups like FF: W, natural history commissioners and producers are increasingly conscious of the paradox that the very act of filming and recording the natural world is itself a destructive force. Indeed, as we discuss below, wildlife films are now proven to cause more environmental damage than any other genre. Many companies in the sector are therefore now trying to reduce their carbon footprint by interrogating the necessity for travelling to the location itself and are instead making increased use of 'in-country' crews. In the process, what one CEO referred to as the traditional 'colonial style' collaboration, is also gradually being replaced by working in partnership with filmmakers who live in the location being filmed. As discussed above (see p. 40–7), the impact of the pandemic and the Black Lives Matter movement has accelerated this change, which also has potentially serious implications in terms of a reduction in work for the Bristol-based natural history talent pool. Clearly, the shift to in-country production is a complex one in which commercial logics struggle with multi-dimensional ethical considerations.

Natural history programming has always come in a variety of budgets, scales and formats designed for different audiences. As noted, the NHU, for instance, produces a wide range of natural history programmes in addition to its high-budget landmarks, including *Springwatch* (2005–), a modest, low-budget but extremely popular series about Britain's wildlife for domestic viewers, which came into its own during the COVID-19 lockdown reaching audiences in excess of 3 million. This range of formats has increased significantly through the rapid expansion of different digital platforms and formats. Natural history programmes lend themselves readily to being 'reversioned' in multiple formats, including high-end short form programmes screened on mobile devices. The proliferation of channels and platforms has served to broaden the spectrum of natural history programming, which adopts a range of modes of audience address in a continuum 'from head to heart' – from films that have an overt scientific basis to those more oriented to entertainment.

Figure 35 *Okavango: A Flood of Life* (2021) © Icon Films

ICON FILMS

Icon Films was founded in January 1990 by the husband and wife partnership Harry and Laura Marshall, in the basement of their house on Kingsdown Parade in Bristol. Since then Icon 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. Icon's management is divided between Laura Marshall, Chief Executive Officer, who is responsible for overall strategy, personnel development and marketing; Andie Clare, Director of Production; Lucy Middelboe, Commercial and Finance Director; and Belinda Cherrington, the newly appointed Creative Director. Harry Marshall now serves as Non-Executive Chairman of the company. Icon's first documentary, *Queen of the Elephants* (1992), formed the basis of its reputation as a specialist wildlife producer by securing a major contract with Discovery Channel. This afforded the company a foothold in the notoriously difficult American television market, which became the foundation for Icon's economic success and subsequent expansion. In a competitive, volatile market, Icon Films, like most Bristol-based indies, works for a range of commissioners rather than relying on one source, a 'mix of ideas, budgets, broadcasters and funding', producing a broad range of programming for various audiences and markets. Icon's staples are repeat series, including *River Monsters* (2009–17) presented by Jeremy Wade, which ran for nine seasons and which could be re-versioned for different outlets: an app, 3D footage for 3Net, a successful Facebook, YouTube and TikTok presence, a live touring show, clothing and books. The dedicated YouTube channel launched in April 2015 now has over 1.8m subscribers. The success of these 'edutainment' programmes with their celebrity presenters supports more ambitious single productions such as *Okavango – A Flood of Life* (2021), which focused on the seasonal changes in this region of northern Botswana where the Kalahari Desert meets the river flood plain, told from the perspective of an indigenous river bushman. Icon Films is clear that being in Bristol offers a significant advantage – 'it is a hub of international unscripted content creation, with a talent pool to match and commitment to increased representation of programme makers and sustainability in our practices'. The company is committed to supporting emerging talent and participating actively in the evolving ecology of the city's screen industries.

The production boom has led to a skills shortage. Natural history filmmaking remains a difficult and demanding career path; various CEOs argued that it takes up to ten years to become a competent producer and equally long to become an expert cinematographer. In many ways the genre attracts those for whom it is a 'vocation not a job', in the words of one CEO, who thought this attitude shaped 'the outlook of the majority of employees in this sector', who were passionate about 'connecting audiences to the natural world'. It is evident that heads of the NHU tend to leave to set up their own natural history companies and therefore remain close to the production process rather than accept a more senior, executive position with the BBC. Their avatar is Sir David Attenborough, who left his role as head of BBC2 – and putative Director General – in 1972 to return to freelance filmmaking. As in the rest of the production sector, natural history filmmaking is highly dependent on freelance labour, and creative personnel move from the NHU – now technically itself independent as part of BBC Studios – to the sector's independent companies and back again. This arguably increases opportunities, advances the exchange of knowledge and expertise and improves career prospects including more rapid promotion, but also exacerbates the precarious nature of careers without security of tenure.

This changing 'fraternity' of wildlife filmmakers has several organisations that serve to bind the community together. The oldest and most important is Wildscreen, a Bristol-based charity founded in 1982 by the ornithologist, Sir Peter Scott, and the former head of the NHU, Christopher Parsons. Wildscreen's stated objective is to bring together natural history filmmakers and conservationists to 'create compelling stories about the natural world that inspire the public to experience it, feel part of it and protect it'. Run by Lucie Muir since 2015, Wildscreen organises Exchange – a global hub that connects conservation organisations with creative wildlife professionals, providing images, videos and expertise; a biennial Festival – that showcases the top talent and distributes the Panda Awards, the industry's top honour divided into various categories; and a Network – to nurture talent and create an 'inclusive community of natural world storytellers', one that will open up natural history filmmaking to a new and more diverse range of voices and perspectives. Though located in Bristol, Wildscreen's focus is global; over eighty per cent of its sponsorship comes from overseas and it is committed to supporting other wildlife hubs, conservation groups and filmmakers worldwide to deliver events about natural history. Its current focus is on helping to create a more diverse and dispersed range of storytelling voices and on supporting the industry's efforts to reduce its carbon footprint and promoting the use of indigenous expertise, including encouraging Bristol-based filmmakers to mentor emerging talent wherever it is located. Wildscreen is also collaborating with FF: W as part of this work (see our case-study opposite).

Figure 36 FF: W filmmakers march through Bristol ahead of COP26 in November 2021. Photo: Lis Oakham

Case Study

‘FILMMAKERS FOR FUTURE: WILDLIFE’

Filmmakers for Future: Wildlife (FF: W) emerged in 2019 when a group of Bristol’s wildlife filmmakers joined a march in support of Youth Strike for Climate, the global movement that began with Greta Thunberg’s school strikes, known as ‘Fridays for Future’. Encouraged to participate by Film Strike for Climate (a Bristol-based, industry-wide movement for climate action in the screen sector), the wildlife filmmakers staged a funeral procession as part of the march, complete with coffins and t-shirts drawing attention to the exceptionally rapid rate of biodiversity loss the planet is currently experiencing. Their speeches testified to the environmental destruction they had witnessed in their work.[62] Seeing their colleagues take such action inspired other workers in the natural history sub-sector to get involved. Following the march, a meeting was arranged to discuss how they could all work together to keep up momentum and explore ways to push for a greener wildlife film industry. These meetings became regular and evolved into what is now FF: W.

FF: W has since expanded significantly and now consists of almost two hundred and fifty members. Most of these are based in Bristol, but the group now also includes natural history filmmakers from all over the world, with members in countries including Australia, Hong Kong, India, Indonesia, Kenya, Nigeria, South Africa and the US, as well as in many European countries. Despite its size, FF: W is currently run on an entirely voluntary basis, with just a small group of volunteer administrators (who are also professional wildlife filmmakers) overseeing its operation. Yet regardless of its grassroots origins, FF: W has developed a wide-ranging organisational infrastructure that helps facilitate members’ work across several core projects or themes (outlined below).

The group has a dedicated website at **ffwildlife.org** which provides a members' forum, news and resources and which acts as the portal allowing new members to register and join FF: W's main WhatsApp group. From this main group, FF: W members can then access a range of the subgroups that coordinate members' efforts on different topics. The aim is to provide a platform for members to connect, have discussions, develop initiatives and to help speed up the process of transitioning to a more sustainable and less damaging industry.

At the time of writing, FF: W has six main subgroups: Reducing Impact; COP 26; Internal Learning; Content; Website and Social Media; and Collaborations. The Reducing Impact group is currently focused on facilitating discussion and collaboration among Bristol's natural history indies and the BBC's NHU. This constitutes a key part of FF: W's externally-facing activities, along with organising events in collaboration with a range of other regional and national stakeholders. In September 2021, the Reducing Impact group hosted the first Bristol Production Sustainability Forum, an initiative which is designed to bring the wildlife sector together every three months to share information, highlight examples of best practice and explore opportunities for collaboration. As well as focusing on reducing the sector's carbon footprint, the Forum also explores ways of producing more impactful content and how production companies can 'give back' to the places where their films are made. Importantly, the Forum also provides a space for dialogue between FF: W and the production companies in the city, in order for both groups better to understand barriers to as well as opportunities for the reduction of emissions and the production of more impactful content.

As well as the Forum, in Autumn 2021 FF: W sent a delegation to the 26th UN Climate Change Conference of the Parties (COP26) in Glasgow. In the lead-up to the event, FF: W's COP26 sub-group oversaw the production of a series of short films from wildlife filmmakers across the world reflecting on the crisis and the future of wildlife filmmaking.[63] The films were exhibited as part of a panel discussion, hosted by Steve Backshall, which explored how the wildlife film industry can take a more proactive role in helping to tackle the climate and biodiversity crisis.[64]

In addition to its public-facing events, FF: W has also organised a range of talks, screenings and events to help its members increase their own understanding about the challenges involved in reducing the industry's carbon footprint, and ways of maximising the impact of the films that are made. Coordinated by the Internal Learning sub-group, previous sessions include, for example, a workshop analysing the carbon emissions of a typical project at Silverback; a talk from a science communication team; discussions with international members about non-extractive filmmaking, co-creative storytelling and the need to get wildlife films seen in the countries in which they are made; and presentations on impact producing within the broadcast industry with an example from the filmmakers at the NHU. Addressing the need for the sector to innovate storytelling practices and develop other strategies to support societal transformation in response to the crisis is also the focus of FF: W's Content group, which is currently working with the Project Impact team to increase the awareness and prevalence of impact production within the broadcast industry.

FF: W's other sub-groups focus on developing the FF: W website and social media presence and on building relationships between FF: W and aligned groups in the wider screen industries (and beyond) in the UK and internationally. Regular industry collaborators in the UK include Albert, the BAFTA body for environmental sustainability that helps projects calculate (and reduce) their carbon footprint, and the Wildscreen Network.[65] Internationally, FF: W also collaborates with organisations including Jackson Wild, the US-based natural history film network; Nature, Environment & Wildlife Filmmakers (NEWF), a network for conservation-motivated filmmakers across Africa; and If Not Us Then Who, a charity that supports indigenous climate storytelling.

Although FF: W has conducted this extraordinary body of work on a voluntary basis, it now faces the challenge of making the organisation itself sustainable. As one of the group's founding members put it to us in interview, one of the future tasks for the group is to explore options for funding:

> 'at the moment, FF: W exists around our day jobs because we don't have time or funding from within the industry to do it at the moment. That's one of the things we're trying to help shift.'

Figure 37 Wildlife filmmakers on the #BristolFilmStrike march in 2019. Photo: Nick Lyon

Bristol City Council and the screen sector

Bristol Film Office, UNESCO City of Film and The Bottle Yard Studios

These three Bristol City Council initiatives constitute a major and unique part of Bristol's screen sector infrastructure. We explore them separately here for the sake of clarity, but it should be noted that Bristol's Film Office, its City of Film designation and The Bottle Yard Studios are very closely connected in terms of their structural organisation, personnel and in their overarching aims and objectives.

Bristol Film Office

Bristol Film Office, a division of Bristol City Council, was established in 2003. The Film Office aims to provide a one-stop shop for productions seeking to film in Bristol and the surrounding area, issuing filming permits to production teams that adhere to industry guidelines and the Council's Filming Code of Practice, supplemented, since March 2020, with additional COVID-19 safeguards that remain in place at time of writing (October 2021). The Film Office has two comprehensive databases – locations and crew and facilities (the latter run in conjunction with Bath Film Office) – that provide a wealth of information. From 2019, the Film Office became integrated with the Council's other filming facility, The Bottle Yard Studios, described below.

Figure 38
The Pursuit of Love (2021)
© Open Book – Moonage Productions – BBC

Figure 39 *Sanditon* (2019–)
© Red Planet Pictures/ITV Studios

Although the Film Office is not currently able, unlike for instance Liverpool that has a production fund,[66] to offer direct financial incentives to companies considering filming in Bristol, its assistance in helping production companies access local talent from diverse backgrounds is becoming increasingly important because of stipulations in the commissioning process. Although the Film Office works with all production companies regardless of genre, its City of Film Manager, Natalie Moore, emphasised that the growth of drama production companies in Bristol would broaden the city's screen ecology and encourage more local screenwriting talent to craft stories in which Bristol is represented as Bristol rather than a surrogate 1920s London. In this way, increased indigenous drama production in Bristol could help amplify representation of the city's diverse histories, cultures and traditions. A focus for helping to realise those aspirations is the other major facet of Moore's role, which is to co-ordinate Bristol's City of Film activities.

Bristol City of Film

In October 2017, Bristol became a UNESCO City of Film. The application, led by Bristol City Council, was initiated by UWE Bristol's Dr Charlotte Crofts in 2014. Through this permanent designation, Bristol became a member of the global UNESCO Creative Cities Network (UCCN),[67] which aims to strengthen cooperation among cities that have recognized culture and creativity as strategic drivers in resilient and sustainable urban development. This is realised through inter-city partnerships involving the public and private sectors and civil society. UCCN cities strive to implement the United Nations' Sustainable Development Goals (SDGs) by strengthening the creation, production, distribution and dissemination of cultural activities, goods and services, broadening opportunities for creative workers and improving access to, and participation in, cultural life, notably for marginalized or vulnerable groups and individuals. The annual UCCN meetings, held in a different creative city in June each year, are the occasion to share best practice, strengthen ties between these far-flung cities, define the strategic objectives of the network and facilitate collaboration for events, festivals, educational projects and other initiatives. There is also a Cities of Film sub-network in which these 21 cities discuss specific film activities in more depth.[68] A website – https://citiesoffilm.org/ (coordinated by Bristol City of Film) – was launched in July 2020 to help promote the exchange of ideas, especially during the pandemic when international travel was impossible. Bristol is also a designated UNESCO Learning City whose strategies are aligned with those of the City of Film as part of Bristol's overarching One City plan.

In this context 'Film' is understood to cover all aspects of the city's moving image sectors: film (shorts and features, documentaries, commercial and art-based, archive and digital), television, animation, music videos, content creation, post-production and visual effects, and virtual and augmented reality. City of Film management sits with Bristol Film Office, a division of Bristol City Council's Culture and Creative Industries team. As noted, it is co-ordinated by Natalie Moore, Bristol's UNESCO City of Film Manager, working alongside Tara Milne, Marketing and Public Relations Consultant. There is a Steering Group, made up of representatives of funding partner organisations and advisory members, which help devise strategic priorities and direction of travel.

City of Film provides a single unifying designation beneath which the city's disparate moving image film industry can unite, one that enhances Bristol's international reputation as a leading centre for moving image production and innovation, champions diversity and aims to increase the range of local access to the moving image industries and citizens' engagement with 'film' culture. The initial four-year Action Plan was organised under three overarching themes: Film Culture, Film Education and Film Production. Film Production used the UNESCO brand to promote Bristol as a dynamic film hub outside London, attracting film production and inward investment. It had a central focus on skills development as part of widening the city's talent base. Film Culture encompassed a series of initiatives to broaden engagement with Bristol's cinema-goers, screen heritage and festivals, attracting visitors to the city, increasing screen tourism and broadening the range and scale of engagement with film. Film Learning co-ordinated activities to unlock talent, improve skills and increase cultural capital across a wider demographic, working with UCCN and local partners, including Bristol Learning City, Encounters Festival, Knowle West Media Centre and Watershed Cultural Cinema. One highlight was a partnership with Belfast and Bradford to promote film literacy in primary schools, a three-year programme devised and developed by Into Film and funded by the Paul Hamlyn Foundation that has embedded film making and viewing in the literacy curriculum, significantly improving outcomes for young learners. The City of Film Office also helped co-ordinate the sector response to the COVID-19 pandemic and its strong recovery (see separate section pp. 40–47).

As part of its next Action Plan (2021–25), Bristol City of Film aims to use the expected growth of the moving image sector – particularly High-End television (HETV) – as the catalyst for sustainable local development, supporting skills enhancement, including fostering local screenwriting talent. This forms part of a broader strategy to strengthen and build drama production in the city region, one that reflects and explores the diversity of Bristol's culture and can project those stories nationally and internationally. Bristol City of Film will work with local partners to extend independent cinema provision beyond the city centre and encourage community cinema programming. The Action Plan will also help the moving image sector create operational plans to reduce its carbon footprint and become more sustainable as part of Bristol's One City Climate Strategy. There are concrete aims to extend the international City of Film network by incorporating academic research that will explore ideas and initiatives in more depth and help devise longer-term goals. We suggest that the City of Film office should co-ordinate the Film Summit (see Recommendations p. 100) as part of its enhanced role as the unifying focus for sector-wide initiatives.

The Bottle Yard Studios

Bristol has its own substantial permanent studio space, The Bottle Yard Studios (TBYS), owned by Bristol City Council, which started operating in 2010. TBYS was founded by Fiona Francombe who lobbied the Council to open up the disused winery and bottling plant buildings on a seven-acre industrial site in Whitchurch on the southern edge of Bristol for filming. This initiative was taken in order to retain production capacity in the city following the BBC's 2009 relocation of dramas such as *Casualty* to Cardiff. The development of TBYS was part of the Council's wider South Bristol regeneration plans, seen as an opportunity to revitalise a disadvantaged area of the city that lacked employment opportunities and any media industry presence which had, historically, been concentrated in the west and north of the city. TBYS was developed by Francombe as site director into the largest dedicated film and television studio in the West of England with eight stages, a large backlot, green screen, workshops, production offices, costume and dressing rooms and a 'creative hub' of 25 on-site tenant businesses offering a range of services to the film and television industries. TBYS has hosted a number of 'High End' television productions over the past decade, including *Galavant* (2015–16) made by Disney's ABC Studios, the pilot for which was the one of the first US broadcast shows to be filmed in the UK, after the introduction of tax credit for 'High End' television production.[69] Other notable productions include: *Poldark* (2015–19)*, Wolf Hall* (2015)*, Sherlock: The Abominable Bride* (2016), *Broadchurch* (2017), *The Trial of Christine Keeler* (2019–20), *Sanditon* (2019), *The Spanish Princess* (2019–20), *The Pursuit of Love* (2020) and *The Outlaws* (2021). Other content made at the Studios has included comedies such as *Trollied* (2011–18); gameshows including *Deal or No Deal* (2013–16), *The Crystal Maze* (2017–20) and *Tipping Point* (2018–); and children's TV such as the popular *Andy's Adventures* (2010–) strand for CBeebies; and commercials.

Figure 40 Exterior of The Bottle Yard Studios
© The Bottle Yard Studios

TBYS has benefitted from the pool of skilled local labour available for crewing productions, from the plethora of filming-related companies based in Bristol, including specialist equipment providers and post-production houses, and the city's developed wider infrastructure, including transport and accommodation services. TBYS has the advantage of being located in a city that offers a range of contrasting locations (such as modern urban buildings, period architecture and green spaces) and is supported by Bristol Film Office which assists with recces, processing permits and liaising between production companies and local residents and businesses. Whilst still being relatively close to London, Bristol also sits at the gateway to the wider South West region with its coastal landscapes and historic houses, which prove consistently popular with filmmakers. The overwhelming majority of drama productions filmed at The Bottle Yard are made by companies located outside Bristol, whose spend is a form of inward investment for the region. As a council-owned and run facility, TBYS is able to engage with these companies in a somewhat different way than if it were a commercial company, stressing how they could contribute to the local community by offering start-up positions on major productions and contributing to the skills agenda described below. If TBYS was a privately-invested organisation it would be difficult to ask for companies to make such a commitment. Because of its local authority-owned status the Studios exist as a very 'Bristol-focused' resource with a clear social value remit, not just providing a filming facility but also seeking to benefit Bristol residents with additional opportunities, such as skills development and educational schemes for young people living in areas of socio-economic deprivation.

Since the previous edition of this report, TBYS has undergone significant changes. Francombe left in 2020 to take up the post of Principal/CEO of the Old Vic Theatre School. She was succeeded by production specialist Laura Aviles, appointed as Senior Film Manager by Bristol City Council to oversee delivery of the city's filming strategy, promoting Bristol as an outstanding filming location and ensuring it delivers a single, consistent offer encompassing studio filming at The Bottle Yard and locations support provided by Bristol Film Office. Aviles is overseeing improvements to the existing facilities plus a substantial studio expansion with three new sound stages – together with production offices, prop stores, costume/makeup areas and breakout spaces – being made available on the neighbouring Hawkfield Business Park site, following allocation of £11.8 million funding from the West of England Combined Authority (WECA). The investment reflects the desire to develop this area of South Bristol further and also the awareness that the boom in production spend driven by streaming platforms discussed elsewhere in this report has put a premium on the UK's studio capacity; the TBYS expansion was fully supported and endorsed by the British Film Commission. Because the expansion entails the conversion of existing buildings rather than construction of new ones, it is anticipated that the new spaces will be ready for use by late summer/early autumn 2022. This development will also enable TBYS to continue offering greater capacity. The productions hosted in the converted Hawkfield site will be of the same mixture of genres as before, and enquiries are already being made about the new stages by production companies keen to secure space for future projects.

As part of its social value remit, TBYS has a commitment to provide educational and training opportunities, particularly for those from South Bristol postcodes surrounding the site (BS14, BS13), which is something Aviles is keen to see expand in line with growing industry demand. TBYS currently hosts an onsite classroom for more than 70 16–19-year-olds studying a two year Film and Television Diploma provided by a tenant, boomsatsuma, a Bristol-based further and higher education provider. The course, which is marketed by boomsatsuma to Bristol schoolchildren with a focus on South Bristol schools, aims to afford access and opportunities for young people interested in a career in film & TV, by teaching practical skills in a studio environment and in some cases giving students the chance to experience being on the set of an actual production.

This meshes closely with the new skills agenda promoted by TBYS and the Bristol Film Office, which have been brought together on the same location as the Council's combined film offering for Bristol. As mentioned above, commissioners and production teams are increasingly keen to be part of initiatives that help widen and diversify recruitment into the screen industries and to participate in schemes that aim to regenerate urban areas. The Film Office and TBYS are working with partners – including City of Bristol Further Education College and Knowle West Media Centre – on a South Bristol Skills Agenda, part of a broader set of initiatives designed to address the skills shortage occasioned by the production boom. The intention is to expand the city's crew base in order to make that production expansion sustainable: ScreenSkills recently estimated that 30,000 additional jobs would be needed over the next five years to meet increased demand, requiring an additional 10,000 'training interventions' annually.[70] TBYS already works with several of the region's universities and also hosts the new Motion Capture Innovation Studio offered by CAMERA, a University of Bath research project. The studio offers state-of-the-art digital innovation facilities including a high-end motion capture array and an instrumented walkway for high-end gait analysis.

As Bristol City Council services, TBYS and Bristol Film Office have a strong sustainability agenda. In 2020 they established jointly a Green Team to implement a five-year Environmental Action Plan that seeks to reduce the carbon output generated by activities on site at TBYS and filming on location around the city, in alignment with the City's ambitious target to become carbon neutral by 2030.[71] TBYS is thus a substantially stronger and more embedded organisation than it was in 2017. However, as a publicly-funded regional facility operating in a commercial industry, it continues to have to shout loudly to make its presence felt on a national level, whilst struggling to attract local productions because of the lack of home-grown drama companies in comparison to the abundance of incoming London-originated drama bookings.

Bristol's media organisations and educational providers

Bristol's media organisations and educational providers

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 screen sector, facilitating networking and collaboration within it and celebrating its achievements in the form of festivals and award ceremonies.

The Bristol Film Office and Bristol City of Film, described above, are two such key organisations. The regional branch of the Royal Television Society, RTS Bristol, also plays a major role in the sector. The RTS is a national organisation, founded in 1927, which consists of thirteen regional centres across the UK. The Bristol branch, formed in 1946, is the oldest. 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 and support organisations also exist for various sub-sectors: Bristol Crew, the Bristol Editors Network,[72] and the Natural History Network and Skwigly in Bristol, as well as BathSPARK, which supports the creative tech community in Bath. Each performs similar networking functions for the sub-sector they represent, sharing jobs, promoting talent and providing discussion fora.

Our focus is on the production sector here, but organisations in the region's exhibition sector also play a crucial role in establishing and maintaining its thriving screen culture. Bristol in particular is home to an astonishing variety of exhibition organisations, from DiY, volunteer-run cinemas such as The Cube Microplex to outdoor, pop-up events, curators collectives, screening clubs and film festivals (examples include Afrika Eye, Bristol Black Horror Club, Bristol Palestine Film Festival, Bristol Radical Film Festival, Bristol Silents, Bristol Sunset Cinema, Cables and Cameras – see profile on p. 31 – and Come the Revolution).

Figure 41 Sir David Attenborough at the 2020 Panda Awards
© JonCraig Photos

Figure 42 MA Wildlife Filmmaking: a collaboration between UWE Bristol and the BBC; © UWE Bristol

Watershed, the region's leading independent cinema, opened in 1982 and has become a major focal point for the city's screen culture and industry, providing a year-round programme of independent films, events, conferences and festivals. Since 2012, Watershed has been the lead organisation for the BFI's Film Hub South West, building a network of exhibitors across the region and providing talent development for a new generation of screen producers.[73]

Festivals play a major role in the region's screen sector, building new audiences for varied work, bringing national and international industry representatives to the area and celebrating the achievements of those who live and work here. Several major film festivals take place in Bristol every year (and are often hosted and/or co-curated by Watershed). The oldest is the biennial Wildscreen festival (see p. 74). 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).[74] Encounters is now the UK's leading short film and animation festival and forms a prestigious international showcase for those who are selected. Cinema Rediscovered, a multi-partner event dedicated to classic cinema and led by Watershed, is now in its sixth year. The biennial Cary Comes Home Festival, curated by Dr Charlotte Crofts, has been running since 2014 and celebrates the life, works and Bristolian roots of Archie Leach, born in Horfield in 1904, who went on to become one of Hollywood's most enduring stars as Cary Grant.[75]

Organisations that work across the region's creative industries also play a key conduit role. The Bristol Cultural Development Partnership (now Bristol Ideas), a not-for-profit company led by Andrew Kelly and owned by Bristol City Council, Business West, the University of Bristol and the University of the West of England, has also initiated and supported a range of cultural initiatives and infrastructure projects across the city since its foundation in 1992, including, most recently, Festival of the Future City, held at Watershed on 21 October 2021. Bristol Creative Industries (formerly Bristol Media) was founded in 2005 with a remit to support, develop and grow the creative media community in the city. Like its partner organisation in Bath – Creative Bath – Bristol Creative Industries works across the sector and hosts job listings, news and networking events. Bristol Festivals, a network for all kinds of festivals in the creative sector, was set up in 2016.

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 enterprises across the region. Creative UK (formed from a merger of Creative England and the Creative Industries Federation in 2021) has one of its three regional offices in Bristol (the other two are in MediaCityUK in Salford and at Elstree Studios in London).

Finally, educational providers are vital. 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 film, television and media courses at undergraduate and often at postgraduate level as well as supervising doctoral research on a range of media topics. These courses and projects are essential to the overall vitality of the region's screen culture and help provide a constantly renewed 'talent pipeline' of skilled graduate labour.

Figure 43 Watershed Cultural Cinema and Digital Creativity Centre on Bristol's Harbourside © Toby Farrow

Educational providers also engage in a range of projects, collaborations and partnerships with the film and television industries. 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. Watershed has several partnerships with both Bristol universities. Aardman has strong links with UWE Bristol, running masterclasses for its postgraduate animation students, and in 2022 UWE's Animation programme was recognised by ScreenSkills as the preferred training provider for a new animation apprenticeship. Aardman 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 BBC's NHU and UWE Bristol have been collaborating on a Masters course in Wildlife Filmmaking for almost ten years, and an MA in Documentary Production is partnered with Plimsoll Productions.

Companies that had established sustained relationships with educational institutions in the region described them as highly rewarding, enabling them to recruit high quality graduates and postgraduates. However, while 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 that replied about this aspect of Bristol's screen ecology 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, which is crucial to the film and television industries' sustainability. Other aspects of the region's training initiatives have been described in the sections on Channel 4 and The Bottle Yard Studios and part of the City of Film's next four-year plan (see p. 82). These will help co-ordinate additional provision and improve awareness of opportunities.

A further important aspect of what could be described as Bristol's 'mature' screen infrastructure is the range of informal and co-working spaces which offer networking and knowledge exchange opportunities that are vital to the construction of an informed creative community in which new ideas and approaches can be shared and diffused. These spaces include cinema, gallery and studio venues such as Watershed's 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, located near Temple Meads station and part of the Temple Quarter Enterprise Zone. The Bristol VR Lab – established by UWE, University of Bristol, Watershed and the Opposable Group to develop Virtual, Augmented and Mixed Reality technologies and products – is housed in Bush House, which UWE shares with Arnolfini. The VR Lab provides a hub for learning, consultation, and experimental research and development in virtual and extended realities, which are becoming increasingly important in the production of moving images.

Locating in Bristol: challenges and opportunities

Locating in Bristol:
challenges and opportunities

Blissful Bristol

Bristol has been rated consistently by the *Sunday Times* as the UK's best city in which to live.[76] Many of our respondents were very enthusiastic about living here, considering it to have 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 ten 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.

Bristol also attracts, in the words of one respondent, 'a lot of really clever people who are like-minded souls'. 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. Indeed, the presence of a highly educated, cutting-edge 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, as noted in the general discussion of creative clusters, was 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.'

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 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 else in Bristol who I think they could work for.' Thus, companies often make significant efforts to ensure that as much as possible of their operations, including post-production, stays within the region and endeavour to recruit, where they can, from local talent to 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." And so that is why we basically do 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.

If Bristol hadn't been what Bristol is, we wouldn't have set up here. (Company CEO)

Regional cities and metropolitan snobbery

However, despite its many advantages and attractions, Bristol is a medium-sized regional 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 believed those who choose to work in Bristol are subject to metropolitan snobbery. Production companies often felt that commissioning editors – based in London and therefore hard to access – assumed 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.' Productions shot in Bristol 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.

However, we have suggested in this updated report that this situation may be changing. The presence of a second national broadcaster, Channel 4, means that several commissioners are based in the city and can become more closely connected to the talent in the region and, over time, more embedded in the fabric of Bristol's screen ecology whilst continuing, as discussed, to operate on a national basis. The success of Bristol's companies nationally and globally and the changing image of the city as both a City of Film and a Creative Hub is giving substance to Mayor Marvin Rees's vision of Bristol's evolution into a 'globally significant creative city'. In the process, Bristol may well start to shed its 'provincial' label and the deference to London can recede into history as more and more creative talent is able to forge a career in the region.

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 exchange 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 tight groupings of companies in screen sectors was generally perceived as a major advantage facilitating a range of networking opportunities and 'untraded interdependencies'. As noted, with the arrival of Channel 4 and the BBC's move, Bristol's screen centre is shifting from Clifton to Finzels Reach in Bristol's old historic centre.

However, several respondents thought there needed to be improvements made to 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. The reduction of car space on several of Bristol's major city-centre roads has, so far, increased congestion rather than stimulated alternative modes of transport. Many companies have businesses that are internationally oriented 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.

Figure 44 River Avon by night
© Alex Brown/Adobe Stock

There is, of course, a downside to this. As discussed in the section on Green Hollywood, Bristol's companies are becoming increasingly mindful of their carbon footprint and of the need to evolve more sustainable and environmentally responsible modes of working. 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. Bristol is the fourth most expensive city to buy a house in, after London, Cambridge and Oxford.[77] 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

As our historical analysis showed, Bristol benefitted significantly from the proliferation of small companies in the 1990s. In many ways Bristol's range and diversity of companies and screen sectors is a powerful testament to its longstanding tradition of enterprise and innovation, and in natural history and animation production, it is worth repeating, the city can claim to be globally significant. David Sproxton, co-founder of 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, like all regional production centres, Bristol faces a number of challenges because of its size and faces the persistent threat that it may shrink below the scale necessary to continue to be a viable location for companies or create sufficient job opportunities for freelancers. Bristol's specialisms also constituted, for some freelancers, a lack of opportunity: 'Bristol is very natural history-centric' commented one respondent; 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. The establishment of Channel 4's creative hub has intensified this trend. 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.

A particular challenge for Bristol has been the lack of opportunities to make television drama and feature films, especially following the loss of HTV and the transfer of *Casualty* to Cardiff in 2011. Although The Bottle Yard Studios has been very successful in attracting drama productions to the city since then, these productions are typically led by companies based outside the region. Consequently, Bristol has developed a reputation for being somewhat limited by its focus on factual television production. As one interviewee put it to us in 2017, 'Bristol is really a TV city, it's not a film city … Being in Bristol is difficult for a fiction filmmaker. 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.' The emergence of a new, nascent cluster of Bristol-based drama producers is thus an exciting development and should be supported by policymakers in the city (see Recommendations p. 100).

A further challenge faced by Bristol's film and television industries is a lack of diversity amongst the workforce. Our findings suggest that the film and television industries in Bristol mirror the low levels of diversity that exist at a national level and which have been the subject of a number of studies.[78] Nationally, 14 per cent of the workforce in the creative industries attended private/fee-paying schools, which is double the proportion of the UK population as a whole. Our study revealed that the proportion of privately educated freelancers working in Bristol was significantly higher; 25 per cent had attended a fee-paying school. As noted previously, the film and television industries in Bristol also lack ethnic diversity. Addressing inequality and diversity in the creative industries is extremely difficult because many of 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.

Conclusion

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?

The original 2017 report showed how the film and television industries in Bristol were the product of a local tradition of entrepreneurship, innovation and a gradual historical evolution. They have grown in significance primarily because of this habit of self-help, 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 that constitutes the complex screen sector ecosystem in and around Bristol. This revised report has demonstrated that over the intervening five-year period these industries have expanded significantly and their economic value to the region has increased. They have become more outward-facing, extending the size and scale of their international reach and have benefitted from the boom in production that has been generated, primarily, by the SVODs. The cluster's commissioning capacity and its national and international profile has been boosted by the arrival of a second national broadcaster, Channel 4. Becoming a UNESCO City of Film has also enhanced Bristol's national and international profile and its major studio, The Bottle Yard, is poised to expand from eight sound stages to eleven, attracting more productions and inward investment into the region. These developments indicate a healthy and responsive creative cluster whose companies are able to grasp the opportunities that present themselves and which were resilient and adaptive enough to withstand the impact of the COVID-19 pandemic. Bristol therefore looks poised to have a thriving future as a centre of regional screen production.

In what follows we present our specific findings and make seven recommendations that, if addressed, would, we believe, help to strengthen and develop this creative cluster.

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.

Findings

1 Bristol's film and television cluster currently consists of 189 independent production companies and BBC Studios (the Bristol element of which comprises the NHU and the Bristol team of Studios' Factual Entertainment Productions). There is a very wide range of companies in the sector, but the vast majority are micro-enterprises or SMEs. There are six established sub-sectors of companies – animation, branded content, facilities firms (including studios), factual, natural history, and post-production – as well as an emergent sector of indigenous drama companies. The long-established specialisms in natural history and animation remain the region's principal strengths in terms of genre of production, but the extensive infrastructure provided by the many facilities companies is a key asset to the region.

2 The region's film and television industries are economically significant and experiencing very rapid growth. The independent sector (not including BBC Studios) generated £197.5m in turnover in 2020/21.[1] This is up £57.2m from the £140.3m generated by the 131 independent companies in 2017 (a growth rate of 40.8 per cent). BBC Studios now operates as an independent entity. In the absence of published figures, our estimates suggest that BBC Studios contributes almost one third, bringing the combined turnover for Bristol's independent sector to £288m (a growth rate of some 105 per cent). This growth looks set to continue as the UK overall experiences a production boom driven by the post-lockdown production restart and increased demand for new content. The Bottle Yard Studios is expanding accordingly, with three new stages in development.

3 The impact of COVID-19 was experienced differently across the region's screen industries. Animation was able to transition to remote working with relatively minimal disruption, yet the travel ban had a severe impact on the natural history sector because so much of its work depends on large teams working overseas. However, most of the production sub-sector reported that the financial impact of the pandemic was one of delay rather than decline. In this respect, given that the scripted genre was hit hardest by covid, the region's predominantly non-fiction orientation appears to have mitigated the pandemic's impact on production companies. Instead, freelancers and the exhibition sector experienced harsher economic consequences.

4 Film and television companies continue to contribute significantly to the region's cultural health, civic community and international profile. This contribution has been enhanced since 2016, particularly through Bristol's designation as a UNESCO City of Film in October 2017 and the arrival of Channel 4 in January 2020. This revised report suggests that co-locating in a cluster continues to stimulate the flow and exchange of ideas, new knowledge and technological innovation; the exchange of freelancers also helps maintain adequate levels of employment to ensure that talent remains in the region.

5 The history and evolution of Bristol's film and television industries have shaped its present configuration in profound ways, notably the growth of the BBC's Natural History Unit and Aardman Animations. The cluster suffered significantly from the loss of HTV but is starting to benefit from the arrival of Channel 4. Channel 4's move out of London is a sign that some of the major regional inequalities in the UK and the concentration of media in the capital are being addressed, but Bristol still lacks a powerful political voice at a national level.

6 Although Bristol's film and television production sector has major strengths in natural history and animation, deriving from its history, the cluster was perceived by some freelancers to lack variety. The absence of a major regional television drama production company was a significant weakness noted in our 2017 report. However, this is starting to change and a small but growing group of new drama producers is now operating in the region. Feature filmmaking, with the significant exception of Aardman's animated features, remains significantly under-represented. The Bottle Yard Studios has been highly successful in attracting high-end television drama productions to Bristol, but so far these have been made by companies based outside the region.

7 Bristol's attractiveness as a place to live and its relative affordability compared to London contributes significantly to the decisions of companies to locate in the region. However, the principal reason remains

the infrastructure, skills, talent and expertise of the workforce and the city's diverse cultural offering. Nevertheless, Bristol's success generates its own pressures, especially the increasingly high cost of housing and office space, and there is intense competition in some sub-sectors.

8 Bristol remains a city of stark social and cultural inequalities and its film and television industries face significant challenges regarding the diversity of its workforce (something that mirrors the national picture). However, while much work remains to be done, these disparities do seem to be better recognised now than in 2017 and efforts are underway to address them in several quarters. More work is needed to evaluate the effectiveness of diversity schemes in the region.

9 Media organisations and educational providers continue to play a significant role in the region's cultural ecology. They help to connect, support and celebrate the work of companies in the cluster and provide a 'talent pipeline' which sustains it. However, more work needs to be done to enhance connectivity among the different specialisms and the sector as a whole.

10 There is an increasing consciousness about environmental concerns and sustainability within the region's screen companies and organisations. This is reflected in in various freelancer and company initiatives and practices to reduce the industry's carbon footprint.

Figure 45 Wildlife filmmakers on the #BristolFilmStrike march in 2019. Photo: Nick Lyon

Recommendations

It is pleasing that two of our recommendations from the previous report – a bid to become a UNESCO City of Film and the presence of a national broadcast commissioner in Bristol – have come to pass. We are also delighted that Bristol City Council continues to support The Bottle Yard Studios and that the facility is expanding, but we have some particular recommendations (no. 4) that we feel would enhance its offer. Implementing the following seven recommendations would, in our view, materially enhance the strength and visibility of Bristol as a regional screen powerhouse.

1 A screen sector summit should be convened by Bristol City Council, under the City of Film banner, to address the issues raised in this report and how best to tackle them. Such a summit should take place bi-annually and consist of executives from the production and exhibition sectors as well as freelancers, educators, policy makers and facilitators in the region, 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 the South West and in other UK nations and regions, should be provided by the British Film Institute and Ofcom. We also recommend that the BBC and Channel 4 provide a breakdown of regional spending and employment figures. Provision of accurate data, including about freelancers, would help to enhance the profile and importance of regional film and television production and call attention to disparities.

3 The provision of affordable office space should be addressed by Bristol City Council and other agencies in order to help enable microbusinesses in this sector to get established and to support freelancers to work in the city. High streets have been particularly hard hit by the pandemic and we note the recent £4.7m ‘Love Our High Streets’ initiative, funded by WECA and Bristol City Council, includes a plan to support creative spaces in the city centre. The region’s screen industries should seek to participate in this scheme.

4 Policy makers should explore ways of supporting more indigenous film and television drama production in the region. The development of a direct financial incentive – akin to the Yorkshire Content Fund or the Liverpool City Region Production Fund, both of which provide up to £500,000 per project – would be a major boost to the region. The Bottle Yard Studios should also be supported to encourage more home-grown scripted production. Another possibility would be to create, or re-create, the equivalent of the iFeatures scheme for low-budget feature film production, whose remit was to ‘capture the essence of Bristol – its values, culture and energy’.

5 In order to address the lack of diversity, particularly class and ethnic 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. A number of schemes are in operation and these need to be monitored and evaluated in order to ascertain where more support and funding needs to be provided.

6 Our findings suggest that a degree of informal co-operation and cross-collaboration exists between the historically separate screen sectors in Bristol and Cardiff. We recommend the formation of a working group to investigate how this could be enhanced and strengthened.

7 Given the seriousness of the threat posed by the climate crisis, the sustainability of the region’s screen sector must be the number-one priority for practitioners and policymakers. Bristol has an opportunity to take a leading role in developing sustainable initiatives with regards to both the carbon footprint of the industry and the health and wellbeing of its workforce. We suggest how to address this issue should be a principal theme of the proposed Screen Sector Summit.

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Endnotes

1 Please note that these figures do not reflect any losses resulting from COVID-19. While we began our data collection just prior to the pandemic, most production companies emphasised that their turnover was delayed rather than decimated by the pandemic. Therefore, while some of the actual turnover figures provided to us will include some losses, we did not anticipate any losses in our estimates.

2 Greater Manchester is a larger cluster because of the massive presence of the BBC in Salford (MediaCityUK), following the relocation of five departments there in 2012.

3 See Harvey and Robins (1993); Goldsmiths (2015), chapter 9, pp. 114–27; Andrew Spicer, 'Public Service Broadcasters as Place-makers and the Politics of Relocation', Keynote delivered at New Frontiers? Channel 4's Move out of London, online symposium, 7 July 2021, available at https://uwe-repository.worktribe.com/output/8174903/public-service-broadcasters-as-place-makers-and-the-politics-of-relocation

4 *Bristol and Bath by Design* (2016), *Final Report*, (November); https://uwe-repository.worktribe.com/OutputFile/906215; Chris Green and Christine Doel, *Bristol-Bath Innovation Cluster*, SQW, September 2018.

5 This dates from the publication of the *Creative Industries Mapping Document* in 1998 and *Industrial Clusters in the UK* (2001). The most influential discussion of clusters was by the Harvard economist Michael Porter who argued that clustering provided 'enduring competitive advantages in a global economy' through local knowledges and relationships 'that distant rivals cannot match', 'Clusters and the new economics of competition', *Harvard Business Review*, 1998, p. 78; online version: https://hbr.org/1998/11/clusters-and-the-new-economics-of-competition

6 Chapain et al. (2010).

7 See Boddy (2004).

8 See Drake (2003), Storper and Venables (2004).

9 The literature on clusters has become very extensive. The best single volume collection is Karlsson and Pickard (2011). Despite the volume of analysis, empirical studies are still quite rare and our hope is that this analysis of one cluster, Bristol, will contribute to knowledge about how clusters actually work, *in practice.*

10 See Christopherson and Clark (2009); Krätke (2011), Storper (2013); see also Xuefei Ran and Roger Keil (eds), *The Globalizing Cities Reader*, London: Routledge, 2018.

11 See Scott (2000).

12 See Boddy (2004).

13 Parsons (1982), p. 362.

14 *Ibid*., p. 55.

15 BBC Bristol also serviced much London-based drama production, including *The Edge of Darkness* (1985) and *The Monocled Mutineer* (1986).

16 https://www.ofcom.org.uk/__data/assets/pdf_file/0007/211201/pact.pdf

17 https://www.theguardian.com/media/2016/may/01/bbc-studios-talent-tony-hall-departures

18 https://www.bristolpost.co.uk/news/bristol-news/bbc-studios-leave-historic-bristol-5468614

19 Swain has since left the BBC to become Managing Director of the London-based, Banijay-owned indie, Shine TV.

20 https://www.bristolpost.co.uk/news/bristol-news/bbc-studios-leave-historic-bristol-5468614

21 Briggs (1995), p. 352.

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25 http://www.bbc.co.uk/news/uk-england-bristol-34484063.

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27 See Chalaby (2010), Doyle (2018).

28 Lee (2018), pp. 54–61.

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35 For an astringent critique of the politics of the BBC's move see Brett Christophers, 'The BBC, the creative class, and neoliberal urbanism in the north of England', *Environment and Planning A*, 40, (2008), pp. 2313–2329. See also Spicer (2019).

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37 *Invent the Future of Channel 4 in Bristol*, npn, our emphasis. We are grateful to Lynn Barlow for providing access to the three unpublished pitch documents.

38 *Ibid*., our emphasis.

39 https://western-gateway.co.uk/

40 Bristol City Council, *Bristol as a Creative Greenhouse*, npn.

41 https://innovationsoftheworld.com/sacha-mirzoeff/, nd, npn, accessed, 13 September 2021.

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49 Albert (2020), *Annual Report, 2019–20*, p. 47. https://wearealbert.org/wp-content/uploads/2020/10/albert_AnnualReport_19-20.pdf [accessed 26/11/2021].

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53 For this edition of *Go West!*, we decided to retain the turnover bands used in the first report, which increased in increments of £500,000 up to £1m, and then in increments of £5m up to £30m+. However, we used a more fine-grained approach to the smaller companies for this edition, analysing companies with turnovers of less than £500,000 using increments of £50,000.

54 Please note that due to rounding percentages may not total one hundred.

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58 Interview with authors, 2021.

59 Max Goldbart, *'Boom Time For Bristol', Broadcast*, March 2021, pp. 8–11

60 Stuart Cunningham and Jon Silver, *Screen Distribution and the New King Kongs of the Online World*, London: Palgrave Macmillan, 2013.

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62 Such is the extent of this biodiversity loss that scientists are now referring to it as the planet's sixth mass extinction event (Begum 2021).

63 One of these films, 'Stand in Solidarity', was based on a major survey of wildlife filmmakers conducted by FF: W a year previously, which sought to understand wildlife filmmakers' views regarding the communication of the climate and biodiversity crises in natural history films. It is the largest survey of its kind ever conducted, the results of which are available here: https://ffwildlife.org/the-big-discussion/.

64 These films and the COP26 panel discussion are available here: https://ffwildlife.org/beyond-the-frame/.

65 In Spring 2021, FF: W collaborated with We Are Albert on a panel discussion that followed up the issues explored by FF: W's 'The Big Discussion' survey. Entitled 'What a Wonderful World: Showcasing the Planet in a Time of Crisis', the event included natural history commissioners, indies, streamers and impact producers. See: https://www.youtube.com/watch?v=KQS4Crhv1xA.

66 https://www.liverpoolfilmoffice.tv/production-fund/

67 The UNESCO Creative Cities Network covers seven creative fields: Crafts and Folk Arts, Design, Film, Gastronomy, Literature, Media Arts, and Music.

68 The other cities of film are: Bitola (Macedonia), Bradford (UK), Busan (South Korea), Cannes (France), Cluj-Napoca (Romania), Galway (Ireland), Gdynia (Poland) Łódź (Poland), Mumbai (India), Potsdam (Germany), Qingdao (China), Rome (Italy), Santos (Brazil), Sarajevo (Bosnia and Herzegovina) Sofia (Bulgaria), Sydney (Australia), Terrassa (Spain), Valladolid (Spain), Wellington (New Zealand) and Yamagata (Japan).

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