UWE Bristol
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Go West! 2.5

Bristol's Film and Television Industries

Andrew Spicer and Jelena Krivosic

Acknowledgements

Go West! 2.5 is an update rather than a full revision of the 2022 report and, like its predecessor has benefitted from the knowledge, support and generous help given by many individuals and organisations. We would like to thank Professor Jessica Lamond, Dean for Research and Enterprise, College of Arts Technology and the Environment, University of the West of England (UWE Bristol) for the allocation of funding that enabled the research for this update to be completed. Once again, this research has been facilitated and enabled by Lynn Barlow, Assistant Vice-Chancellor Creative and Cultural Industries Engagement, UWE Bristol and we are very grateful for her support. As with the two previous reports, *Go West! 2.5* has been superbly designed by Jim Smith and we would like to thank him for his patience and professionalism in helping to produce this Report.

We are extremely grateful to all those who agreed to be interviewed for this update, taking time out of very busy schedules to engage with our questions and queries, and who provided a raft of invaluable insights into the workings of the screen industries and the region's rapidly changing ecology. Our interviewees were: Laura Aviles (Former Head of The Bottle Yard Studios, now Industry Advisor to Patchway Studios); Jonathan Brigden (Managing Director Studio Giggle); Sean Clarke (Managing Director Aardman Animations); Oscar De Mello (Operations Director MyWorld University of Bristol); Nona Hunter (Creative Economy Lead West of England Combined Authority); Sam Glover (Founder and Director SG Capital Partner/Patchway Studios); Jonny Keeling (Head of the Natural History Unit, BBC Studios); Reema Lorford (Chief Operating Officer Gritty Talent); Grant Mansfield (CEO and Founder Plimsoll Productions); Stephanie Marshall (Head of the BBC in the West and South-West); Stephen McQuillan (Founder and Managing Director Atomic Television); Sacha Mirzoeff (Head of Bristol Hub, Channel 4); Natalie Moore (Bristol UNESCO City of Film Manager, Bristol City Council); Keith Scholey (Joint Director Silverback Films); Phoebe Sinclair (Managing Director Gritty Talent); Adela Straughan (Bristol Film Office Manager, Bristol City Council). Thanks also to Emma Cox (Creative Project Officer West of England Combined Authority); Rosie Dunkley (Deputy Managing Editor BBC West and South-West); Oliver Henderson (Senior Skills Analyst West of England Combined Authority); Mark Leaver (Independent Consultant); Tara Milne (PR & Marketing Consultant to Bristol City Council's Film Services); Katherine Nash (Head of Studios, The Bottle Yard Studios, Bristol City Council); Stuart Newman (Senior Economic Analyst, West of England Combined Authority); Jo-Ann Parkinson (Communication Manager, BBC Studios Factual); Dr Steve Presence (University of Bristol); Juliet Rice (Creative Director Factual Entertainment Bristol and Cardiff, BBC Studios); Philip Walker (Head of Culture and Creative Industries Bristol City Council).

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Executive Summary

Research Aims and Objectives

The first iteration of *Go West!: Bristol's Film and Television Industries* was published in 2017, the second in 2022. The decision to create an interim Report rather than wait for a further five years to pass was taken because of the exceptional speed of change in what is a notoriously volatile sector. *Go West! 2.5* covers the period 2022 to mid-2025 but it is *an update and not a full revision*; it provides an overview of the principal changes that have occurred in this period in the screen sector as a whole, followed by a closer consideration of how these have impacted on the regional ecology. For this update, we have also included an additional section focusing on training providers. As in the previous reports, the overarching aim is to consider how Bristol's film and television sector is evolving in relation to economic, cultural and political changes and to evaluate its current significance to the region: the area covered by the West of England Enterprise Zone (figure 1).[1]

Research Design

Go West! 2.5 adopts the same research design and methodology used in the previous reports so that longitudinal changes can be observed. Appendix 1 provides a complete list of the 198 companies currently trading in the region and their postcodes. Appendix 2 provides a list of companies that have ceased trading since the last report; those that have moved away; and the ones that have started in or relocated to Bristol. A more detailed, interactive and updatable online company location map is in preparation, which will be made available separately once a decision as to where it should be hosted has been taken.

The Report contains fully updated statistical data[2] about:

a) the number of companies in each of seven sub-sectors: Animation; Branded Content; Drama; Facilities (equipment hire, studios, transportation, SFX and VFX, costume services and so on); Factual; Natural History; and Post-Production

b) the distribution of turnover per sub-sector; and turnover bands

c) the number of full-time employees in each sub-sector

As in previous reports, we wish to emphasise that many companies operate across two or more sub-sectors, a characteristic that has been amplified by company diversification – a major theme in this Report – as a means of sustaining production in a contracting market.

This Interim Report is informed by a detailed scrutiny of sector, local authority and government reports, trade journals, academic analyses and journalist commentaries alongside fifteen detailed interviews with CEOs of Bristol companies and regional organisations. Although we touched on freelance labour with our interviewees and have had numerous conversations with freelancers, we did not have the resources to undertake a complementary analysis of the freelance community that is so essential to the region's screen ecology. However, at various points in this Report we draw attention to freelancers' significance and the difficult problems that they face.[3]

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

Findings

1 Bristol's film and television cluster currently consists of 198 independent production companies (indies) and two public service broadcasters: the BBC (a local news facility and BBC Studios on separate sites) and Channel 4. These indies continue to be astonishingly varied but in terms of size, the overwhelming majority are micro or small businesses. Although the seven sub-sectors identified in previous reports – Animation, Branded Content, Drama, Facilities firms (including studios), Factual, Natural History and Post-Production – remain meaningful categories, one of the principal findings of this interim report is that companies are diversifying in response to market contractions and shifting their focus into the digital arena as the market in broadcast television continues to contract.

2 Bristol's core strength continues to be its pool of expert labour, its established network of partnerships and co-operation, and its forward-thinking readiness to embrace change, building on the city's historic traditions of self-help, entrepreneurial and technological inventiveness. Co-location in a tightly packed cluster facilitates the flow and exchange of new ideas, knowledge and innovation, and social and cultural as well as economic capital. Competitive companies continue to co-operate through, for example, the exchange of freelance talent, to ensure that expertise remains in the region rather than migrates elsewhere and to resist the gravitational pull of London as the UK's dominant media centre.

3 The 'continued growth' reported on in 2022 has not materialised. Rather, what this 2025 Report demonstrates starkly is a dramatic boom-and-bust cycle that has created instability, company closures and severe economic and wellbeing problems for the freelance labour on which the region depends. Although the long-established specialism in Natural History continues to be the region's core strength and the basis of its international reputation, this sector has been particularly hard hit, revealing the problems of being dependent on international finance. The region's PSBs, the BBC and Channel 4, have also experienced difficulties – the freezing of the licence fee and the downturn in advertising revenue respectively – at a national level that has constrained their commissioning power and made companies increasingly risk-averse.

This decrease in the number of commissions and the reduction in budgets has exerted further pressure on regional indies, especially those operating in the 'squeezed middle' that look to returning early evening series for long-term stability. Although BBC Studios has been relocated in high quality facilities, there has been no equivalent investment in local news provision.

4 Despite these severe difficulties, the region's film and television industries continue to be economically significant to the region with an aggregate turnover of £325 million in 2025. This is an increase of £37 million from the 2022 figure (£288 million), a rise of 11.38%. The screen sector continues to contribute to the region's cultural health, cultural tourism, its civic communities and its international status.

5 Although there have been significant casualties – 53 companies have closed – Bristol's film and television industries have proved to be resilient. Companies are diversifying to widen their portfolio of projects and revenue streams, and many are proving to be agile and adaptable enough to take advantage of the sector-wide 'pivot to digital', which poses many challenges but also a raft of new possibilities.

6 A more far-reaching problem is the labour pool. Although our report focused on companies, we became acutely aware of the severe difficulties – lack of security, anxiety and wellbeing – experienced by freelance labour in particular, a regional problem that mirrors the national picture. As freelancers retrain and permanently move to other sectors, and young talent is dissuaded from entering, the long-term future of the sector is at risk; this issue may intensify over the next year as smaller, more diverse companies continue to close. Problems concerning the lack of diversity and inclusiveness remain, although the dearth of specific regional data makes it difficult to support these claims.

7 Bristol's screen sector is supported by a raft of training schemes and world-leading, regionally based R&D. Bristol City Council continues to be proactive through the work of its Film Office, its UNESCO City of Film activities, and The Bottle Yard Studios (TBYS). TBYS is a major asset, withstanding both the shock of COVID and the downturn; its three additional state-of-the art

Figure 2 Aerial Shot of The Bottle Yard Studios © Bottle Yard Studios

sound stages increasing its contribution to the local economy. However, it has lost out on numerous occasions because of the absence of a regional production fund and the financial constraints experienced by Bristol and other local authorities as a result of the severe spending cuts since 2010.

8 The widespread use of AI will affect the UK's film and television industries in a number of critical ways over the coming years. What we have found within Bristol's screen sector is a sense of *creative anticipation* rather than apprehension as a realm of new possibilities opens out. AI offers some efficiencies in workflow operations, but companies recognise that creative control must remain with their experienced human labour force.

9 Although varied, the cross-section of companies reveals some significant absences: in particular, Bristol's tiny scripted sector with, currently, only 6 indigenous companies active in this region. A thriving, variegated drama sub-sector would counteract the region's dependency on inward investment and attract a different cohort of creative talent. Strengthening this sub-sector would help to offset the trend of 'helicoptering' crews into the South-West as there would be a more reliable and continuous need for skilled drama crew in the region. Scripted's relative absence curtails the possibilities of strong regional voices emerging, ones that could represent the region to itself. Developing drama could strengthen local identity and a sense of belonging and also enhance the South-West's national profile.

10 Bristol has benefitted from a long-term government policy of gradual decentralisation that has attempted to 'rebalance' the UK's economy away from its historic concentration in London and the South-East. The BBC's commitment to sourcing more than half of its production spend from the nations and regions benefits BBC Studios in Bristol; Channel 4's shift from a metropolitan to a regionally based company has fashioned an expanding Creative Hub in the city; and WECA is able to make more strategic interventions in the sector through increased funding. Nevertheless, as we emphasised in the two previous reports, Bristol lacks a powerful political voice at a national level. In particular, our interviewees were much exercised by the disparity in provision enjoyed by the devolved nations (Northern Ireland, Scotland and Wales) and the English regions. The proximity of Cardiff that has received far greater levels of investment only serves to sharpen a perception of inequality and a sense that the specific needs and possibilities of the South-West region are being overlooked or undervalued and problematises discussions about an enlarged regional 'supercluster'.

Recommendations

Since the previous Report in 2022, our first recommendation, that there should be an annual Bristol Screen Summit has come to pass. There have been three very successful iterations organised by Lynn Barlow, UWE Bristol's Assistant Vice-Chancellor Creative and Cultural Industries Engagement. This Interim Report will be launched at the fourth, on 11 November 2025.

1 The film and television industries most pressing need is also the most intractable: how to secure stability and long-term sustainability in the sector. The reports we refer to in our overview section on the UK's film and television industries all call for urgent action. Although we found no support amongst Bristol company CEOs for the recommendation of the Culture Media and Sports Committee's report on *British Film and High-End Television* (2025) of a levy on streamers that would be used to fund 'culturally distinct' British productions, we recommend that the Government explore other mechanisms to lessen the UK's dependence on inward investment. We support the Committee's recommendation of a Freelancers' Commissioner 'to advocate at the highest levels' and also its recommendation of a guaranteed basic income that would enable freelancers to ride out production slumps. Retaining and supporting the UK's world-leading creative personnel should be the first priority for this sector, including further measures to increase diversity and inclusivity.

2 We recommend that a detailed study of the region's freelance community be undertaken, a full revision and extension of the 2019 study *Invisible Army: The Role of Freelance Labour in Bristol's Film and Television Industries* undertaken by our colleague Dr Amy Genders. This study would complement our Report's analysis of companies by discussing in detail what issues freelancers face and how they might be addressed. In the absence of regional data, such a study would need to both qualitative and quantitative.

3 In our previous reports, we suggested that a regional production fund be established. In our Findings, we commented that the Bottle Yard Studios has lost out in attracting productions because such funding was not available. It is therefore very pleasing to note that such a fund is now on the horizon as part of WECA's increased provision for the region's film and television industries. We recommend that a regional production fund should have a strong focus on diversity and sustainability as well as nurturing local talent to tell regional stories and use Bristol locations and thus promote indigenous drama companies that currently form less than 1% of the total aggregate turnover. This provision needs to include development funding, often the crucial element for SMEs, and have a promotional element that would enable companies to raise their profile nationally and internationally, which would, in turn, enhance the profile of the South-West region.

4 We recognise Bristol City Council's problems in maintaining The Bottle Yard Studios as a commercial studio space. We have described its importance in detail, both economically and culturally as a key regional asset. As the Council continues to review options for the Studios' governance following its announcement in July 2025 that it will not be sold at the present time, we suggest that other options should be considered carefully rather than an outright sale. If both sites were ever to be sold, we advocate that the Council puts in place stringent safeguards to ensure that its training, outreach and social inclusivity remit continues.

5 Analysing regional sectors continues to be beset by problems of detailed and reliable data, as noted by the CMS Committee's *British Film and High-End Television* (p. 36), among others. For this Report we have, as before, generated our own but also benefitted from data produced by WECA. However, we urge again that national institutions – the BFI, Ofcom, ScreenSkills – and the PSBs (the BBC, ITV, Channel 4 and Channel 5) provide detailed regional data. This provision would help policy makers significantly by showing the diversity of needs across different regions – and between nations and regions – and therefore how provision might best be implemented in local areas to address specific issues, problems and aspirations.

Figure 3 Wallace and Gromit
© Aardman Animations

6 In such a fast-moving and technologically dependent sector, the importance of funded R&D to a region's strength is indisputable. Therefore, we look to UK Research and Innovation (UKRI) and other funders to maintain their commitment to *devolved* R&D funding that deploys embedded local networks and knowledge to work effectively with a range of partners. We recommend, in line with the CMS Committee, that the tax exemption enjoyed by science research grants be extended to the cultural and creative sector.

7 In 2022 we recommended the formation of a working group to investigate the possibilities of collaboration between the historically separate screen industries in Bristol and Cardiff. As we discuss in the section on a cross-border 'supercluster' or 'creative corridor' linking the South-West with the Cardiff Capital Region, that preliminary work has been completed. We recommend that further work be undertaken, particularly addressing how the pronounced resentment about the disparity between the funding available in a devolved nation as opposed to what is perceived to be far less generous provision for the English regions might be overcome.

The UK's Film and Television Industries

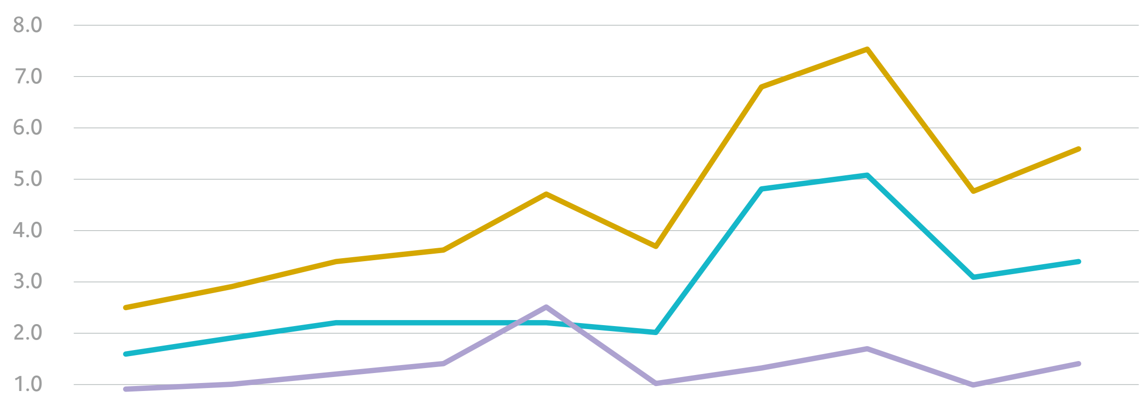
The UK's Film and Television Industries

The health of the production sector is underpinned by a cycle of creative renewal, enabled by low barriers to entry. This means that creative talent is incentivised to build and develop businesses before selling to larger rivals, spinning out, and starting the process again. This cycle is how established producers and in-house studios gain access to fresh ideas and talent and can diversify and grow. It attracts third party funding to the sector. It means that commissioners benefit from innovative ideas and audiences benefit from new stories from across the UK. An attractive domestic UK production sector also attracts and anchors inward investment – which otherwise would move around as more countries compete in terms of fiscal incentives and studio space … The ecosystem is complex and finely balanced, and future growth and sustainability are not guaranteed.[4]

Boom-and-bust

The cycle of creative renewal identified in the quotation above has been severely disrupted during the reporting period. The post-pandemic production boom in 2021 and 2022, which reached a record high of £7.5 billion production spend in 2022 was followed by a fall of 36% in 2023. The British Film Institute's graph of UK Film and Television production spend, reproduced below, shows this cycle clearly.[5]

Figure 4 Summary chart. UK spend of film and HETV projects, 2015–2024. Source: BFI.



	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Film	1.6	1.9	2.2	2.2	2.2	1.7	2.0	2.4	1.7	2.1
HETV	0.9	1.0	1.2	1.4	2.5	2.0	4.8	5.1	3.1	3.4
Total	2.5	2.9	3.4	3.6	4.7	3.7	6.8	7.5	4.8	5.6

Although the screen sector is inured to cyclical variations, these abrupt and precipitous fluctuations have been extreme.

High-End Television (HETV) spend, which had shot up from £2.3 billion in 2020–21 to £5.45 billion in 2021–22, slumped to £3.2 billion in 2023–24, recovering slightly to £3.6 billion in 2024–25.[6] The overall production spend in the screen sector fell by 36% from 2022 to 2023.[7] This severe downturn occasioned commissioning cutbacks, company closures, redundancies and a pervasive uncertainty about the future. Although small indies and especially freelancers were hardest hit, the UK's public service broadcasters (PSBs), which account for more than 80% of all UK original content commissions, were also adversely affected: ITV cut 200 jobs as part of a £50m restructuring programme; Channel 4 shed 240 staff and made plans to sell its London offices on Horseferry Road. The BBC was affected by this market contraction but also because the value of its licence fee, frozen in 2022, had fallen by £1 billion since 2014 and its overall income dropped by 30% necessitating annual savings of £700 million.[8] As a result, overall revenues across the sector fell by £392 million in 2023 and the total amount spent on commissioning dropped by more than 10% to its lowest level since the industry shut down during the pandemic in 2020, international commissions fell by more than 29% and production budgets were down by 25%.[9] The number of HETV productions declined from their 248 peak in 2022 to 181 in 2024.[10] Although the screen sector is inured to cyclical variations, these abrupt and precipitous fluctuations have been extreme.

The pronounced spike in production was caused by the sudden surge of productions held back during the pandemic, many of which were in an advanced stage of development, coupled with a huge increase in production spend by the streamers that had seen their subscriber numbers soar. The subsequent slump was caused by several factors. The first was that the streamers' unbridled expansion was unsustainable and was followed by the current period of consolidation and aggregation; the second was the impact of the writers' and actors' strikes in Hollywood (together covering the period May–November 2023); the third was a marked downturn in advertising revenue on which the UK's commercial PSBs (ITV, Channel 4 and Channel 5) all depend, which dropped by £1.5bn, 35%;[11] the fourth was the resulting decline in PSB commissioning, which remains the major source of UK production finance in the television sector – in 2021 PSBs accounted for 1,802 commissions compared to 22 from streamers;[12] the fifth factor was a macroeconomic downturn as a result of geopolitical instabilities, resulting in investment uncertainty, straitened government expenditure, and a concomitant price inflation and cost-of-living crisis that reduced consumer spending. These difficulties revealed the screen sector's increasing internationalism and its concomitant dependency on inward investment. Although the UK film industry has long survived through inward investment, the television industry has become equally dependent: 82% of production spend in 2023 was from overseas sources.[13] This has been caused by the increase in spending by streamers but also the decline in PSB spending. In 2023, PSB commissioning accounted for 51% of the television sector revenues (down from 65% in 2013), while international providers accounted for 39% (up from 15% in 2013).[14]

Although the sector has recovered, recording a modest growth in 2024, and commercial PSBs' revenues have stabilised, the impact of this volatility has been profound, affecting commissioning patterns and production trends, company sustainability, and employment and wellbeing, all of which are in the process of negotiating longer term change as a result of the sector's ongoing adjustment to a digital world that is transforming business models and consumption.[15] Broadcast television continues its slow but inexorable decline, not offset by increasing use of Broadcasting Video on Demand (BVoD) platforms. Audiences now access media products across a range of platforms and two-thirds (67%) of UK households subscribe to at least one of Netflix, Amazon Prime Video or Disney+; 19% subscribe to all three.[16] YouTube, a 'free' platform that increasingly hosts many more long-form programmes, is now the second most watched service by UK audiences.[17] This shift in viewing patterns has created a substantial rebalancing of industry revenues, with the online sectors including Subscription Video on Demand (SVoD), BVoD, connected TV advertising, and transactional online video (one-off purchases) collectively accounting for 42% of overall sector revenue up from 33% in 2022.[18] A recent report commented that the screen sector 'is in a period of flux and transition which will likely continue over the coming years' as companies attempt to navigate a path to a 'new normality'.[19]

Figure 5 Channel 4 Bristol Creative Hub exterior © Channel 4

Production Trends

Not only are the number of commissions reducing but there has been an accompanying concentration on higher budget productions drawn from a narrower range – the mantra is 'fewer, bigger, better' – focusing on the so-called 'core genres', drama and high-end factual, in order to drive subscriber numbers and the streamers' 'new focus on profitability'.[20] Ofcom noted that this trend has led to spiralling costs and pressure on UK broadcasters to make programmes with 'international appeal' catering to 'established tastes'.[21] This narrowing has squeezed mid-range production (principally soaps and returning series and, to a lesser extent, also lower-budget productions such as daytime and lifestyle programming.[22] Productions have become increasingly reliant on obtaining third-party funding and there has been a growing risk-aversion, with a greater number of UK commissions being renewals rather than new shows.[23] Ofcom considered that these pressures 'could create a risk that content is less UK relevant or less likely to feature new talent and ideas' in a sector that was becoming ever more reliant on 'potentially unpredictable investment sources'.[24] The Culture, Media and Sport Committee concurred, arguing that although the streamers had created 'significant opportunities' for UK talent and businesses, the 'domestic production of culturally distinct British films and HETV had failed to keep pace with the growth of productions substantially funded and controlled from outside the UK through inward investment'.[25] Although there has been an upturn in production, the film and television industries remain risk averse and there are indications that the television industry in particular is 'not experiencing a temporary downturn, but something more fundamental and long term'.[26]

Figure 6
Antiques Roadshow © BBC Studios

Although there has been an upturn in production, the film and television industries remain risk averse and there are indications that the television industry in particular is 'not experiencing a temporary downturn, but something more fundamental and long term'.

These developments have significant implications for UK indies, only a few of which have the resources to produce high-end programmes; streamers are much more likely to favour well-resourced, experienced companies with proven expertise reduce risk.[27] Ofcom's research noted that these production trends were having 'a particular effect on smaller and mid-sized independent producers (many of which are based in the nations and regions)', which looked to low-cost, domestically-oriented long-running, returning series to provide a stable revenue stream to reinvest and grow.[28] The genres in which commissioning is declining and investment falling are those that represent the widest variety of production companies. The increasing requirement to find third party funding has affected smaller specialist companies in particular, with those in the nations and regions worst hit.[29] Ofcom found that some well-established, smaller independent production companies have closed, merged with other companies, or are facing challenging circumstances.[30]

If these trends continue, the independent producers association Pact argues that the UK's SMEs 'would not be able to gain the necessary experience, reputation and investment to grow and access higher value commissions' becoming increasingly reliant on 'existing ideas' and established formats. In response, companies have looked to diversify, including moving into adjacent genres or online short-form content and related areas such as virtual production, facilities, event production, social media marketing and management.[31] However, pivoting to a new genre requires capital and talent alongside an existing network in the target market, an often lengthy and risky process. With declining investment and narrowed opportunities, the industry is becoming less attractive to new entrants. Overall, the sector is in danger of becoming increasingly homogeneous, lacking the diversity and new voices that replenish creativity. As the epigraph quotation argues, a more homogeneous ecosystem would be less dynamic and innovative and less attractive to inward investment. This would undermine the UK's global competitiveness that has been based on the reputation of its producers and its skilled talent and crew, along with robust local broadcasters which can act as talent incubators and potential co-commissioning partners.

Figure 7 *The Rivals* © Disney+

Employment, Wellbeing and Diversity

The consequences of the 'feast and famine' production cycle of 2022–25 have been most keenly felt in the patterns of employment in a sector that has always been heavily reliant on freelance labour: 44% are self-employed compared to 13% in the total UK workforce.[32] The sector was at near capacity in 2022 (80%–90% of available workers engaged on a project), but this dropped to 60% in 2023–24.[33] A 2024 report for the Broadcasting, Entertainment, Communications and Theatre Union (BECTU) noted that 75% of freelancers were unemployed during the American strikes and estimated that 68% of film and television workers were currently unemployed, 88% were concerned about their financial security over the next six months; a chilling 75% reported struggling with mental wellbeing.[34] Between 37% and 50% of workers said they planned to leave the industry in the next five years.[35] (The figure for the South-West region was 38 per cent. One Bristol training provider commented that skilled talent is 'leaving the industry in droves'). BECTU's figures mirrored those in a report by the Film and TV Charity that nine in ten of 10,000 respondents had experienced some form of mental health issues as a result of their work and more than half (55%) had considered taking their own life.[36] This picture contrasts starkly with the findings of our 2022 Report (p. 46) in which workers remarked that there had never been a better time to enter the industry and that career progression was accelerating.

75% of freelancers were unemployed during the American strikes and an estimated 68% of film and television workers were currently unemployed, 88% were concerned about their financial security over the next six months; a chilling 75% reported struggling with mental wellbeing.

The cultural and creative industries have had well-documented problems with workforce diversity. A 2020 report noted that only 16% of those employed in this sector were from a working-class background; a figure that fell to only 8% when the film and television sector is considered in isolation.[37] The consequences of the downturn have exacerbated these tendencies. Many companies reported that reduced commissioning spend and the changing genre mix make it harder for them to progress further with off-screen diversity, and the narrowing of opportunities was particularly felt by majority ethnic or working-class-led companies.[38] This trend was highlighted in a 2025 study, which demonstrated that working-class representation across the creative industries had actually declined between 2020 and 2023.[39] The industry mantra – 'fewer, bigger, better' – only serves to worsen the situation. Diverse production teams are less well represented on high-end productions than mid-lower budget continuing series. Overall, the variety and diversity of the UK production sector is at significant risk.[40]

Government Intervention

In comparison to many other European nations especially France, UK governments have been reluctant to intervene extensively in the screen sector, always haunted by the spectre that any form of protectionism would reduce the inward investment on which the industry depends. The exception has been tax relief, that has had a transformative effect on the television industry since it was introduced in 2013. The Foreword to the Labour Government's Industrial Strategy document proclaimed a UK that is 'open, entrepreneurial … an unashamed champion of global trade'.[41] Unsurprisingly therefore, there are no plans to adopt the Culture Media and Sport Committee's recommendation to introduce a 5% levy on streamers to supplement the budgets of 'high-end drama of specific interest to UK audiences but which don't necessarily have cross-border appeal', as well as a scheme to support creative workers between jobs that has proved effective in several other countries.[42] (In France, streamers are mandated to reinvest 20–25% of their domestic revenues back into French productions). Although the 2024 Media Bill extends Ofcom's regulation to the streamers to ensure audiences are protected from 'harmful content', there has been no attempt to extend the terms of trade that indies enjoy with the UK's PSBs that protects their IP. Perhaps more surprising is that the Government has no plans to rejoin Creative Europe from which many UK companies benefitted significantly, including Aardman Animations in our region. On 1 April 2025 the Government introduced the Independent Film Tax Credit that has been broadly welcomed within the sector, including the South-West. Nevertheless, Labour's industrial strategy does, finally, recognise the value of the Creative Industries as one of its eight 'growth-driving' sectors that are 'the engines of the modern economy'.[43] Accordingly, the UK Global Screen Fund is to be boosted (up from £7 to £18 million) as part of a £75 million package for the creative industries and increased support for independent screen content to reach international audiences. The British Business Bank is to increase the amount of equity finance available in the sector by an additional £4 billion, and the Creative Industries Sector Plan aims to increase annual investment from £17 billion to £35 billion by 2035. The government's regional plans are discussed in the section on the region's local authorities.

Bristol's Screen Ecology

The sector-wide changes identified above have affected Bristol's screen ecosystem profoundly. The West of England Combined Authority (WECA) Screen Industry Employment Annual Growth Rate (figure 8) demonstrates strikingly the sharp spike in 2023 followed by a steep decline and the slight upturn in the first half of 2025, which is in pronounced contrast to the national annual growth rate. It shows that the WECA region appears to be highly susceptible to the challenges that face the screen industry partly because of the dominance of the Natural History sub-sector, discussed in detail on pp. 37–51.

WECA's Screen Industry Annual Employment graph (figure 9) also shows a similar spike.[44]

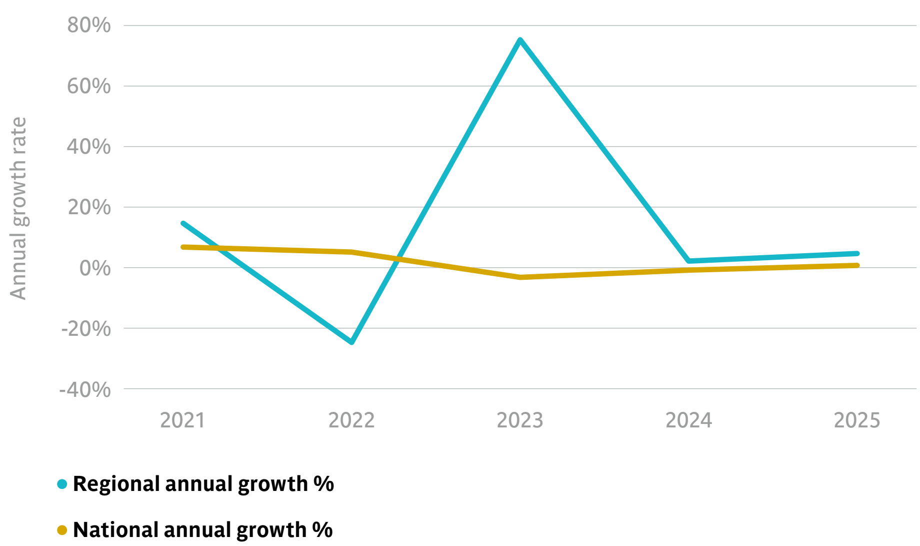


Figure 8 WECA Screen industry employment annual growth rate
Data source: Lightcast (2025)
Report: *Lightcast Q1 2025 Data Set*

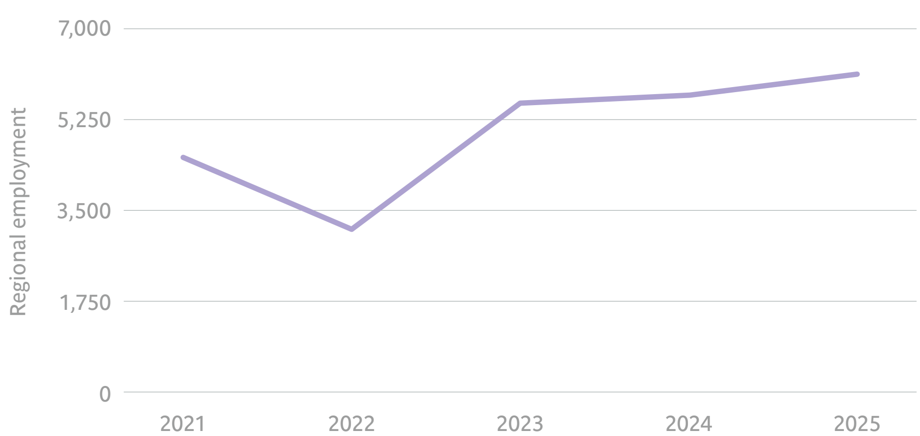


Figure 9 WECA Screen industry annual employment
Data source: Lightcast (2025)
Report: *Lightcast Q1 2025 Data Set*

The destabilising dual impact of a marked production boom followed by a pronounced slump caused no less than 53 companies to cease trading.

The employment growth spurt shown in figure 8 was largely driven by the sudden restart in Summer 2020 of existing drama productions that had been placed on hold during early lockdown, and new commissioning in the genre by international streamers in response to a global uptick in streamer subscriptions amongst audiences at home who were unable to access other forms of entertainment. This increase has not been followed by a corresponding decline and appears to have levelled out and be growing slowly. However, the destabilising dual impact of a marked production boom followed by a pronounced slump caused no less than 53 companies to cease trading – see Appendix 2 for the full list. The most notable casualty was Icon Films, which closed on 26 May 2023 after 33 years in production. This state of affairs contrasts sharply with the increasing number of companies and general buoyancy evident in our 2022 Report and the one by Oliver and Ohlbaum that scrutinised Bristol as one of three expanding 'screen sector clusters', which was based on figures from 2016–22.[45] Many companies have reduced to a minimal workforce as they wait for available commissions to increase; several retain an online presence without having any projects in production. We argue, therefore, that the impact of such an abrupt industry slowdown has longer term consequences and that companies may continue to close if commissions do not rise significantly.

The universal perception amongst those we interviewed and others with whom we talked to more briefly was how tough the screen sector had become. One highly experienced producer contended: 'There are a lot of companies struggling to get commissions, to keep their staff in place, to keep development running. It's a very, very difficult market. I would say as difficult as it has been in my whole time in television.' Even the mantras 'Survive to 2025' and 'Stay in the mix till '26' have proved to be optimistic. 2025 has been difficult and 2026 is also looking challenging: 'As an ecology, Bristol's screen scene is in quite a grim place; I think it will get more difficult before we see a recovery'. The dramatic downturn in production has been felt particularly strongly in specialist factual, affecting small to medium-sized companies most acutely. And because many of the programmes commissioned during the boom years are now reaching the screens, particularly in Natural History, there is a distinct possibility that there will be insufficient work to sustain all of Bristol's post-production houses. These facilities are integral to Bristol's ecology because they retain work in the region rather than being undertaken in London.

The retrenchment of the streamers already noted has had a major impact on Bristol's ecology because it has affected Bristol's particular specialism – high end factual – the most and revealed its dependency on the decisions of international companies that have no investment in or loyalty to the region. We return to this aspect in our discussion of Natural History filmmaking, always the core of Bristol's screen ecology. This decline in factual has been partially offset by a significant growth in high-end television drama productions: the number of hours of drama produced in Bristol almost doubled between 2016 and 2022, from 25 to 45 hours, with the value rising from £59 million to £122 million, mostly driven by increased SVoD and multichannel commissioning.[46] However, these figures precede the slump we have analysed in this Report and the productions are funded by companies outside the reason thereby increasing Bristol's dependency on international finance that we discuss in this Report.

All our interviewees have made clear that any recovery must also involve readjustment. The 'new normal' as it is often referred to, is not the status quo ante-COVID but a realignment in an industry that one CEO described as 'moving very fast and in a process of flux' in which the increasing shift to digital affects every facet. The most pronounced trend, again reflecting the national situation, has been for Bristol companies to *diversify*, particularly into the digital arena and away from linear television which, as we have identified, is a shrinking sector, its decline inexorable as younger audiences turn increasingly to digital platforms and social media. The move or 'pivot' into digital requires new ways of working, producing content that can sit on different platforms that have different audiences, 'a merging of what's digital, what's broadcast and what's brand … smart companies can put themselves forward in multiple ways and attract different revenue streams sometimes for the same product'. As noted in the previous section, this change will not happen overnight and involves the formation of new strategies and business models and a steep learning curve to ascertain what could succeed in the new dispensation.

The most pronounced trend, again reflecting the national situation, has been for Bristol companies to diversify, particularly into the digital arena and away from linear television

Figure 10 All Set West.
© Bristol City Council Film Services

The Big Picture: New Data on Bristol's Production Sector

The Big Picture: New Data on Bristol's Production Sector

As in the previous reports, this section analyses the size and shape of the screen industries in the region by providing data on several key metrics: company numbers in various sub-sectors; company size (turnover figures); and employment figures. Appendix 3 provides a detailed discussion of how those figures were calculated. As in previous reports, we emphasise that our seven sub-sectors – Animation; Branded Content; Drama; Facilities; Factual; Natural History; and Post-Production – are distinct but overlapping categories and numerous companies work across two or more sub-sectors, a characteristic that is increasing as companies seek to diversify to sustain production. Overall, company number operating in this region have risen slightly, from the 189 recorded in 2022 to the current 198. A full list of companies (with postcodes) is provided in Appendix 1.

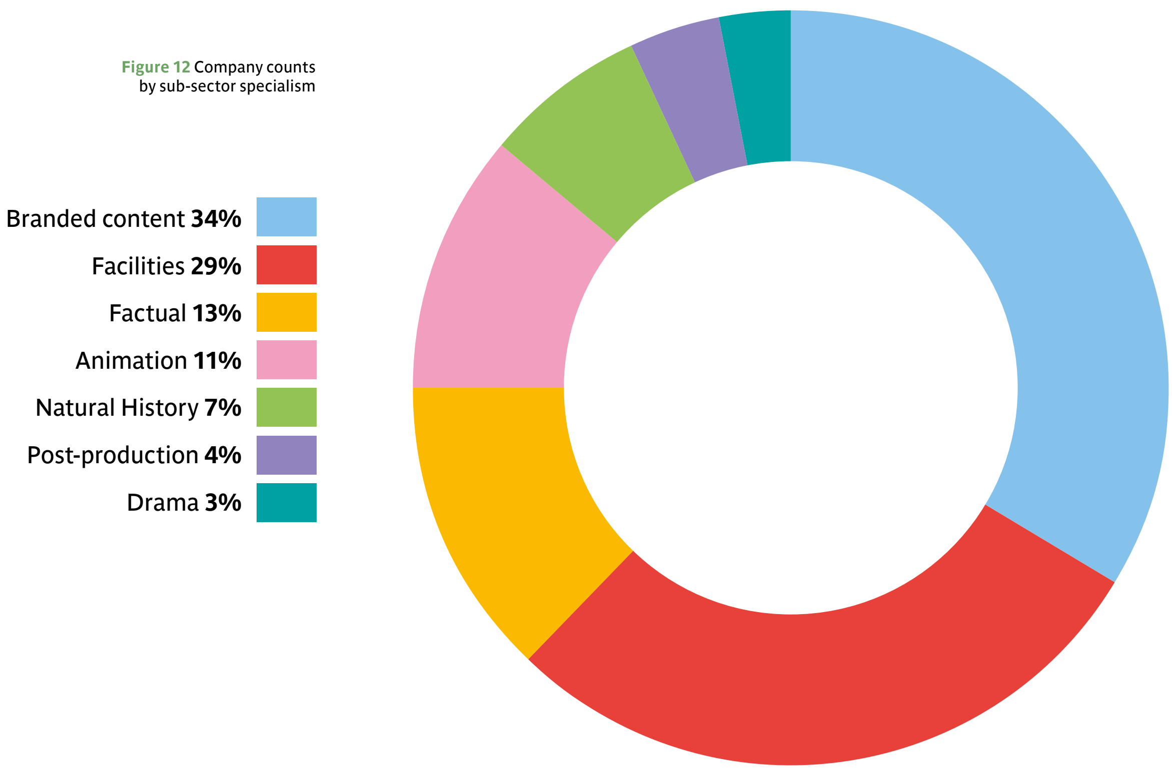
Figure 11 *A Bug's Life*
© Plimsoll Productions

Company Numbers

Bristol's core sub-sector Natural History has shrunk (from 17 to 13 companies, 8.6% to 7%); Animation, another core genre, has also declined (from 27 to 22 companies, 14.4% to 11%) and shows the difficulties faced even by well-established firms. Facilities and Post-Production are broadly unchanged, whereas Factual has risen slightly (from 22 to 26 companies, 11.2% to 13%) as companies diversify their offering. The most significant rise has been in Branded Content/Corporate (up from 27.8% to 34%), which reflects the general shift away from broadcasting towards the digital sector (including social media). Drama has decreased slightly (from 8 to 6 companies, 4.3% to 3%), a further indication of the difficulties that small businesses have in sustaining production and retaining staff.

As commented on in previous reports, the number of companies in a sub-sector is not necessarily proportionate to the volume of turnover generated; company counts often display an inverse relationship to turnover and employment. Although numerically the largest, Branded Content accounts for only 8% of the region's total turnover, a slight decrease from 2022 (9.4%). Factual exhibits the most significant increase, doubling from 12.5% in 2022 to 24% in 2025 as more companies diversify from their core specialisms. Although the number of Animation companies has decreased, the turnover has increased (from 11.7% to 15%), indicating again that it is the smaller companies with less resources to withstand production slumps that are most vulnerable. However, the most significant fact revealed by the turnover data is that although Natural History remains the most significant sub-sector, its contribution has shrunk from nearly half the aggregate total (44.2%) in 2022 to less than a third (30%) in 2025.

Figure 12 Company counts by sub-sector specialism



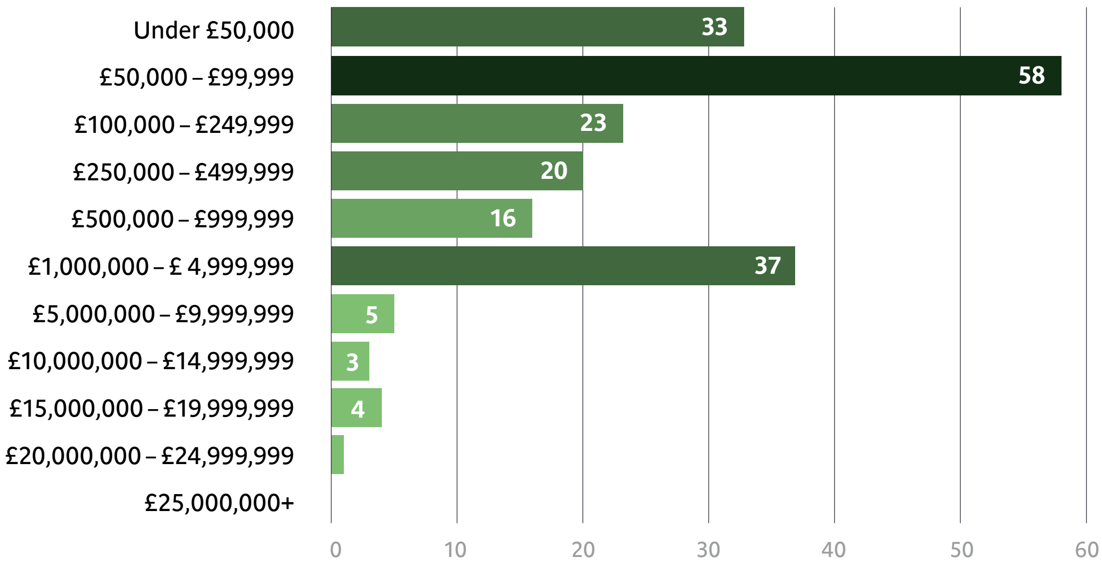


Figure 13 Turnover bands

Turnover

The bar graph above shows a broadly unchanged picture from 2022: the overwhelming majority of companies 134 (68%) have a turnover of less than £500,000; the 2022 figure was 64.6%. This figure demonstrates clearly that Bristol continues to be composed of micro-businesses – those with fewer than 10 employees and a turnover of less than £632,000 (particularly in the Branded Content sub-sector) – or small businesses, those with fewer than 50 employees and a turnover of less than £10 million.[47] The number of businesses with a turnover of less than £50,000 has increased significantly from 17 to 33, and the number with less than £100,000 is up from 46 to 58. These turnover levels make it very difficult for companies in these bands to withstand a production slump. The only other significant change is the increased number of companies in the £1–5 million turnover range, from 30 to 37, which have the resources to withstand short-term shocks.

Turnover by Sub-Sector

The total aggregate turnover has also increased from £288 million in 2022 to £325 million in 2025, an increase of £37 million (11.38%). However, as with the employment numbers, this increase masks the pronounced boom-and-bust cycle already described. Natural History remains the largest sub-sector, but its contribution to the aggregate total has reduced significantly: from 44.2% in 2022 to 30% in 2025. Animation's figure has increased (from 11.7% to 15%) even though the number of companies has decreased, a further indication that it is the smaller companies that are struggling. The most significant increase has been in Factual whose aggregate turnover has doubled (from 12% to 24%) easily overtaking Animation (the second largest in 2022), a further indication that Bristol's screen ecology is becoming less specialised. Although, as noted, the number of Branded Content companies has increased significantly, their aggregate turnover has slightly decreased (from 9.4% to 8%) showing that sub-sector's reliance on micro businesses. Post-Production and Facilities are more-or-less unchanged, as is indigenous Drama production that continues to represent less than 1% of the overall total.

The total aggregate turnover has also increased from £288 million in 2022 to £325 million in 2025, an increase of £37 million (11.38%). However, as with the employment numbers, this increase masks the pronounced boom-and-bust cycle already described.

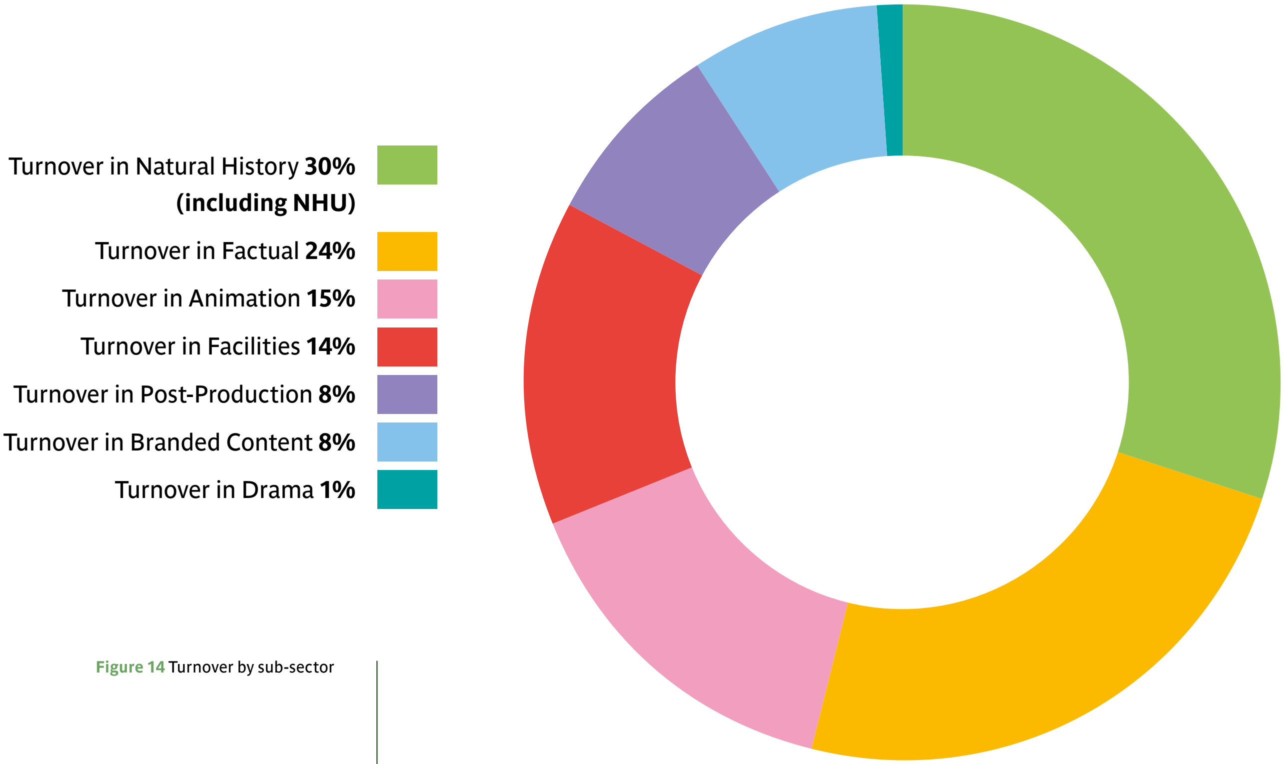


Figure 14 Turnover by sub-sector

The total number of FTEs across the sub-sectors is 2,935, a small increase on the 2022 figure of 2,760.

Our general comments from 2022 remain unchanged: it is extremely difficult to measure employment in an industry that grows or shrinks according to the number of productions in progress. Many companies have a small core of full-time staff and a network of freelancers assembled for each individual production, their number depending on the budget level. As has been noted, the mid-range of returning productions that offer security of employment and a settled cycle of demand is being squeezed, which exacerbates this sector's systemic precarity and makes planning, and in some cases survival, difficult. The total number of FTEs across the sub-sectors is 2,935, a small increase on the 2022 figure of 2,760. The BBC remains the major employer: 324 staff in local news based in Broadcasting House; 400 in Factual and a further 320 attached to BBC Studios' Natural History Unit, a total of 1,044. We have not included the first figure in the pie-chart below as local news does not fit within our sub-sector breakdown. The pattern of employment numbers broadly corresponds to the turnover figures and confirms the shrinkage of the Natural History sector, with 22% of the total as opposed to 28.5% in 2022, and also Animation (down from 14.9% to 11%). Factual has increased from 20.1% in 2022 to 27% as Bristol's production sector becomes more generalist.

Although we were not able to estimate the numbers of freelancers working within the region – which needs an additional survey and dedicated report (see Recommendations) – our interviews with CEOs and numerous informal conversations with freelancers leads us to conclude that between 65% and 75% of freelancers are out of work in the region, reflecting the national trends previously noted.

Date	Inward investment value
2024/25	£46,645,000
2023/24	£30,038,739
2022/23	£20,134,750
2021/22	£20,857,000
2020/21	£12,609,250
2019/20	£17,057,000

Figure 15 Inward Investment from Productions Facilitated by Bristol Film Office and the Bottle Yard Studios by year [Source: Bristol Film Office Annual Filming Reports]

In *Go West! 2*, we commented that the significant decrease in inward investment in 2020/21 reflected the impact of the three-month lockdown caused by the COVID-19 pandemic. The recovery in 2021–22, a 22% increase, represented the largest contribution in the decade since the BBC moved *Casualty* to Cardiff in 2011. The income generated in 2022–23 was similar, followed by a very pronounced leap to just over £30 million in 2023–24, which was the first full year that the second set of three studios at The Bottle Yard became operational and the first year in which a new and improved method of calculating the economic contribution was used.[48] There was another significant increase – 55% – in 2024–25. Major productions (3 feature films and 26 HETV series) included the Netflix Agatha Christie detective story *The Seven Dials Mystery* and the BBC comedy drama series *Boarders*. Although the number of 'major' productions was slightly down on the previous year (from 32 to 29), the increased spend reflected their greater scale and ambition, which necessitated longer shoots with the concomitant increase in revenue for the local economy. The £46.6 million generated in 2024–25 is a significant contribution to Bristol's economy making it imperative for Bristol City Council to secure the long-term future of TBYS.

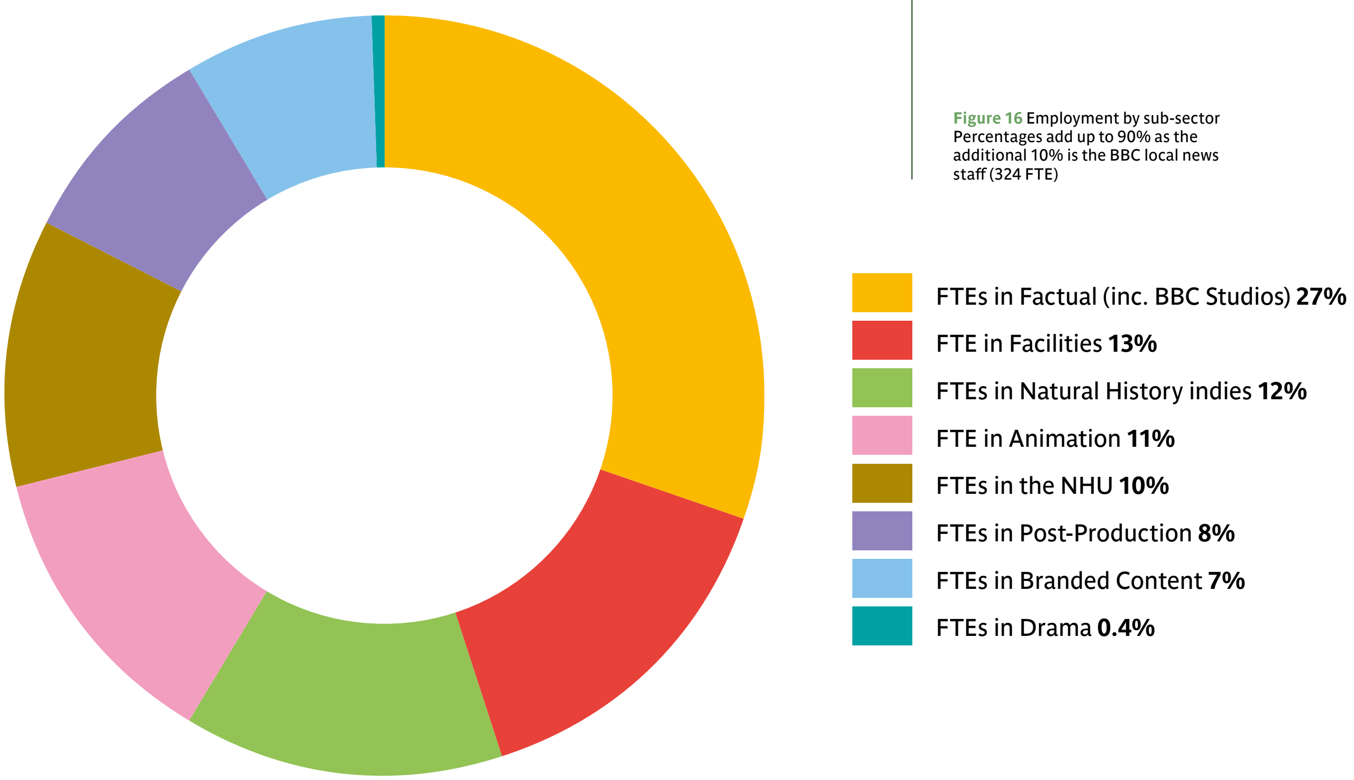


Figure 16 Employment by sub-sector Percentages add up to 90% as the additional 10% is the BBC local news staff (324 FTE)

Bristol's Principal Film and Television Companies

Bristol's Principal Film and Television Companies

In what follows, in line with the structure of *Go West! 2*, we consider the major Bristol companies before analysing Bristol's core specialism: the Natural History sector, followed by case study profiles of three companies. Further sections discuss the role played by regional authorities – Bristol City Council and the West of England Combined Authority – before a consideration of research and development in which the region's universities play a key role. In an additional section we highlight the significance of regional training providers through a case study of Gritty Talent. In conclusion we reflect more broadly on Bristol's particular situation. Our Findings summarise the changes that have occurred in what one CEO called 'these three tempestuous years' and we end on a series of seven Recommendations as to the ways in which Bristol's screen ecology could be strengthened.

Figure 17 *Countryfile* © BBC Studios

Public Service Broadcasters

The BBC

The prevailing pressures on the UK's public service broadcasters were described in the general section on the UK's film and television industries. The 30% cut in the BBC's budget noted there has profoundly affected all aspects of the Corporation's organisation and operations, including the South-West, reducing the number of commissioned programmes and their budgets. The BBC's latest *Annual Report and Accounts* for 2024/25 contends that the current 'geopolitical and macroeconomic uncertainty looks likely to continue into 2025 with a slower commissioning market' as well as reduced advertising revenue across the sector.[49] Nevertheless, the BBC remains the most important entity in Bristol's screen ecology. The BBC in Bristol is a major employer, although far less so than in Manchester or Cardiff.[50] However, its particular significance has been catalytic as argued in the BBC's 2024 report *Bristol Economic Impact*.[51] The BBC was Aardman Animations' original commissioner and has generated a range of independent companies, most notably in the Natural History sector, which became crucial in the establishment of post-production houses such as Films@59.

As well as running its in-house training and apprenticeship schemes and various career accelerator programmes, the BBC also contributes to regional R&D and in upskilling local talent through in-house training schemes and public-facing events, including the Fast Track Wales and West initiative with Channel 4, S4C and Creative Wales that aims to accelerate the careers of senior factual producers.

Figure 18 The fading gentility of Broadcasting House – the home of local news. Photo: Andrew Spicer

Figure 19 The sleek modernity of Bridgewater House – BBC Studio's new base. Photo: Andrew Spicer

The BBC Academy offers apprenticeships and accelerator schemes as well as hosting events for schools and colleges at Bridgewater House.

Although the BBC remains a unified institution, it has two distinct elements: its public service functions (principally news and sport) and its production/distribution arm, BBC Studios that is not funded by the licence fee. This division was made starkly visible in Bristol when, in March 2022, Studios moved out of the BBC's historic site, Broadcasting House on Whiteladies Road in Clifton, to Bridgewater House in Finzels Reach, part of a recently redeveloped waterfront quarter near Bristol's medieval centre, a mile-and-a-half distant.

BBC Bristol has been a Centre of Excellence for factual programming since 1992 and is the largest division of BBC Studios Factual Entertainment Productions.

BBC Bristol

The public service functions of the BBC in Bristol are to produce programmes for Network Radio, principally a local news service that remains one of the Corporation's most important functions. Arguably, its significance has increased in an era in which the whole concept of impartial news and accountability has come under sustained threat. In interview, Stephanie Marshall, Head of the BBC in the West and South-West, argued: 'Our pursuit of truth without an agenda has never been more important or more vital.' However, that pursuit now takes place in an increasingly digital world which has necessitated major changes in types of output and ways of working. Marshall contended that local news gathering has undergone a 'massive reorganisation and transformation', especially in the way content is delivered. This has resulted in a 40% growth for online services and requires her teams to work across all platforms. As a result, local news can cover events as they unfold and with a detail that would have been unthinkable a generation ago.

Local news faces three significant challenges. The first, also faced by the BBC as a whole, is to work out when and how audiences, particularly the younger age range, engage with its services. The second is how to reflect and serve the region, to create a sense of identity and belonging, particularly as Marshall sees this purpose – the need for audiences to see themselves represented and be given a voice – to be 'the lifeblood of the BBC as a public service institution'. I the current division of the BBC's English regions, the West (Bristol, Somerset, Wiltshire and Gloucestershire) has been amalgamated with the South-West (Devon and Cornwall and the Channel Islands) but each has a distinct identity. After BBC Studios moved out, most of the Broadcasting House site has been mothballed. The BBC now needs to decide both how to use this site most efficiently and whether to find a buyer for this valuable – and historic – owned asset.

BBC Studios

BBC Bristol has been a Centre of Excellence for factual programming since 1992 and is the largest division of BBC Studios Factual Entertainment Productions.[52] The move of BBC Studios to Bridgewater House was a marker of the importance the BBC attaches to Bristol as a production base. The new site – with its plate glass frontage and 'eco-sensitive' recycled wood – is the material image of a modern, entrepreneurial organisation. Its designer, Tim Hutton, commented:

Figure 20 *Bargain Hunt* © BBC Studios

Figure 21 BBC Local News Reporters © BBC

'We designed the space to showcase BBC Studios' content pioneers, inventors and reinventors while providing an inclusive, inspiring workspace that motivates its people to do their best work'.[53] Bridgewater House offers not just more suitable accommodation and state-of-the art facilities but is also an attractive site which prospective commissioners from, for example Netflix or Disney, could be shown round with confidence. This showcasing has become significant because BBC Studios produces not only its own programmes but also ones for other broadcasters and the streamers in what one executive described as the current 'really aggressive marketplace'.

In 2024, the Factual Entertainment department merged with BBC Studios Entertainment with a remit to deliver premium Factual Entertainment, Events, Topical, Music and Entertainment and with a new production team led by Suzy Lamb. A senior Studios executive commented that 'in the current market we actively encourage staff to work cross-genre; the mix of skills and experience is a great positive to our work and productions'. Unlike the public service elements of the BBC, BBC Studios does not have a regional structure but operates from six production bases in the UK, including Bristol, and ten international ones.[54] Therefore where programmes are produced is decided pragmatically on a case-by-case basis. BBC Studios' principal element in Bristol, the Natural History Unit, is considered separately, but BBC Studios in Bristol also produces many of the Corporation's longest running factual programmes such as *Antiques Roadshow*, *Bargain Hunt*, *Countryfile* and *Gardeners' World*. BBC Studios in Bristol also produces factual programmes for other companies, including UK PSBs – such as *Unique Boutique* for Channel 4 and *Rescue 999* for Channel 5 – and streamers, satellite channels (Sky) and YouTube.

Channel 4 remains committed to decentralisation and five years on, the Bristol hub has had a fourfold increase in staffing (from 7 to 29).

Channel 4

Since January 2020 Bristol has hosted a second national broadcaster, Channel 4, which opened one of two Creative Hubs in Bristol (the other was in Glasgow with Leeds as the new headquarters). However, Channel 4, like ITV (Channel 3), has been adversely affected by the pronounced downturn in advertising revenue already noted. According to Enders Analysis the broadcaster experienced a record deficit (£52 million) in 2023 and a significant drop in cash spend on programming in 2024.[55] These difficulties led to a steep decline in the number of Channel 4 commissions, affecting several Bristol indies, which considered that it had adopted a more risk-averse stance. This perception corresponds with Ofcom's sponsored research, which revealed that audiences considered that the broadcaster was becoming less edgy and more mainstream, relying on repeated formats and programmes designed for 'comfort viewing'.[56] In its OurFuture4 strategy Channel 4 announced it was to become a 'digital first' broadcaster and its Fast Forward strategy, launched in January 2024, emphasised the diversification of its income streams as part of the move into a 'fully digital world'. Channel 4 amassed more than 2.3 billion views across its social media output in 2024 and has had conspicuous success with its YouTube channels designed to reach younger viewers. However, this development still represents only a tiny fraction of the total viewing figures and 91% of its income continues to derive from advertising.[57] Although established in November 1982 as a publisher-broadcaster, the 2024 Media Act permitted Channel 4 to produce its own programmes. However, from the outset, Channel 4 stated that in-house production would be a very gradual process and a key part of it would be to give careful consideration to the effects it would have on the industry, especially small indies.[58] One executive commented that these in-house developments will not be at the expense of its indie commissioning that remains 'the lifeblood of the organisation … it's in our DNA'. Channel 4 continues to work with a huge range of indies, currently 189 according to its 2024 Annual Report, and several in Bristol, including Five Mile Films that makes the returning early evening series *The Dog House*.

The impact of Channel 4's move to Bristol was initially slowed by the pandemic coupled with attempts to stave off the previous government's idée fixe to privatise the broadcaster (no longer on the political agenda). However, Channel 4 remains committed to decentralisation and five years on, the Bristol hub has had a fourfold increase in staffing (from 7 to 29), drawn from different parts of the organisation. A wide-reaching Nations and Regions (N&R) strategy was launched in October 2024 and although its main thrust was to increase content spend in the devolved nations, all new More4 commissions in 2025–26 will be reserved for indies based in either the nations or the English regions as part of a commitment to grow the broadcaster's bases in Bristol, Glasgow or Leeds so that Channel 4 reaches its target of 600 roles outside London.[59] The N&R strategy includes the Junior Commissioning Editor Programme, designed to develop the next generation of commissioning talent outside of London, one of whom – in Factual Entertainment and Documentary – will be Bristol-based. In addition, lead commissioners – one for each genre – have been established.[60] The Bristol Head of Hub, Sacha Mirzoeff, considers that these schemes will enable commissioners 'to engage with specific

Figure 22 Channel 4 Bristol Creative Hub interior © Channel 4

places in depth so that companies feel they're being genuinely listened to … a specific point of contact who will regularly come to your patch to talk about your ideas'. This engagement will include visiting company offices to try to appreciate their situation and aspirations, thereby cultivating relationships 'at different stages of formation' with commissioners able 'to report back at the highest level'. These new developments will complement Channel 4's existing regionally inflected support schemes for indies which, rather than offering major financial investment, provide expertise, legal support and advice about the company's sustainability. These schemes have been strengthened in the recent N&R development by reconfiguring the Business Boost Programme to help grow indies outside London through bespoke training in leadership and business skills. This programme has two distinct programmes – the Business Boost Foundations designed to support early-stage indies and the Business Boost Next Level focusing on established businesses 'poised for growth'. Two Bristol-based companies were included on the Foundations scheme in 2025: Calling the Shots and Angel Eye Media. Calling the Shots, founded in 2000 by Jeremy Routledge, specialises in championing emerging writers and artists in Bristol and the South-West. A recent Channel 4 commission was *Tell Me When You're Bored* (2025). Angel Eye, founded in 2002, produces factual entertainment, documentary and reality TV programmes; recent Channel 4 commissions have been *Dubai: Buying the Dream* and *Love Cheats*, both transmitted in 2024.

Like the BBC, Channel 4 implements a range of training schemes at national and regional level. An increase to £10 million a year has been made available through 4Skills to support talent development, with a focus on underrepresented communities and skills gaps in the nations and regions. This initiative included The Plug, a networking group open to ethnically diverse talent that will provide mentoring sessions, networking events, and masterclass webinars to embed long-term equity into the fabric of the media industry, connecting brands, creators, agencies, and businesses. A pilot for the New Writers scheme, supported by the BFI, designed to encourage local writers to script regional stories, was introduced in the South-West in 2023, in collaboration with the Film Office, The Bottle Yard Studios and UWE Bristol. Its success meant the scheme has been extended nationally. Despite its difficulties, Channel 4 has become an important component of Bristol's screen ecology economically, culturally and also symbolically as a marker of Bristol's national importance as a production centre.

Despite its difficulties, Channel 4 has become an important component of Bristol's screen ecology economically, culturally and also symbolically as a marker of Bristol's national importance as a production centre.

Figure 23 *Sugarloaf* pilot project

Aardman Animations

Often considered *the* Bristol success story, Aardman Animation's much-loved figures – Wallace and Gromit and Shaun the Sheep – function as global brands, national treasures and regional money-spinners. In 2025, Gromit Unleased 3 was launched, the latest in a series of 'grand appeals', which, beginning in 1995, have raised more than £90million for the Bristol Children's Hospital charity as well as boosting the city's tourism. This work exemplifies Aardman's civic role that complements the commercial activities of a company that has been employee-owned since 2018 thereby retaining its independence and creative autonomy.[61]

Although exploiting its iconic brands continues to be the core of Aardman's operations – *Wallace and Gromit: Murder Most Fowl* reached an audience of 16 million when it was broadcast by the BBC on Christmas Day 2024 – the company was badly hit by the sector difficulties already described; 30 of its staff were made redundant in 2024 as part of refocussing its operations that also included ceasing to distribute other companies' animation programmes or making games. Aardman's CEO Sean Clarke shares the common perception that the screen industry has become 'incredibly risk-averse' making it extremely hard to develop and try to market new and original material, which means that the company must keep many more options in development. Recently, Aardman has begun to work with other companies' global brands: Star Wars, Pokémon and bringing back Pingu with Mattel. The other sector-wide challenge Aardman faces is to engage with and appeal to a generation that does not watch broadcast television and to create content for social media platforms – such as TikTok and Instagram – not as a spin-off but as a primary production focus. Aardman has established a 'digital first' business unit that produces and monetises products launched on social media. Always technologically innovative, Aardman has worked with MyWorld (see pp. 60–61) to discover how new technologies can enhance creativity not displace human decision-making. The company is excited by the possibilities of AI but expects the government to regulate this sector to ensure AI companies are not allowed to mine the company's brands without getting its permission.

Plimsoll Productions

Founded in 2013, Plimsoll Productions has been the other conspicuous Bristol indie success story, identified as one of the UK's fastest growing companies, appearing on *The Sunday Times* Fast Track 100 and the International Track 200 listings. Although affected by the production downturn, especially in Natural History, Plimsoll has managed to weather the storm because of its broad-based portfolio – 'Wildlife Plus' – that also includes factual entertainment, documentaries and adventure programmes as well as live entertainment, exemplifying the diversification we argue has become a *sine qua non* for the screen sector. Like Aardman, Plimsoll is involved actively in the Bristol ecology and runs several training schemes and supports a number of entry level internships and work placements.

The major change since the previous report has been Plimsoll's acquisition, in June 2022, by ITV Studios for £103.5 million as part of the broadcaster's drive to accelerate its international growth and increase its business with the global streaming platforms with which Plimsoll has established strong relationships.[62] Wooed by several suitors, for CEO Grant Mansfield, the choice of ITV Studios was strongly influenced by considerations of 'cultural fit' and autonomy; 'they're very respectful of our independence … we were allowed to behave, continue behaving, like a true independent production company'. He also considered that ITV respected the importance of Plimsoll remaining a Bristol-based company. Being part of ITV Studios offered not only enhanced distribution muscle but the expertise available to a huge organisation, especially in developing Plimsoll's digital division. In concert with other companies, Plimsoll is pivoting to digital, creating new content for digital platforms at the same time as it explores the 'transformational' possibilities of AI, which, like Aardman, Plimsoll sees not as a threat and loss of autonomy but as a new creative resource. The company is currently working on its first pilot for an American network for which most of the material is generated by AI.

Figure 24 *Nightmares of Nature*
© Plimsoll Productions

The Natural History Sub-sector

The Natural History Sub-sector

Natural History production has always been the core of Bristol's screen ecology, dominated by the BBC's Natural History Unit (NHU) that has generated a number of independent companies, some of which have been set up by ex-heads of the NHU. Although the figures given in the Big Picture section of the Report (pp. 22–25) show the sub-sector's continued dominance, it was hit particularly badly by the downturn already described. As we noted in the previous report, nearly all Natural History productions were paused during the COVID-19 pandemic because of travel restrictions. There was a dramatic spurt in production when these were lifted. And, because wildlife programming had proved popular with audiences during the pandemic, streamers, having held commissioning budgets back, used their soaring revenues to commission numerous series, thereby further increasing production and creating an employment spike.

As discussed, this production level was unsustainable. Increased interest rates and the collapse of the global distribution market caused streamers, no longer assured that their subscriber numbers would continue to increase, to be much more carefully selective in what they commissioned. Focusing on what they perceived to be the genres that would generate profits and keep their shareholders happy, streamers spent their reduced revenues on high-end drama, live sport and big entertainment factual formats rather than Natural History programmes that were considered to be slow to develop, expensive and not guaranteed to drive up or retain subscriber numbers. In addition, the series that had been commissioned already had a long shelf life and there was no further need to produce others. One CEO argued that the production boom had also caused 'market oversaturation': there were too many Natural History programmes being produced resulting in duplication of subject matter and audience fatigue. The global companies that had been major funders of Natural History programmes – Sky, Apple+ and Netflix – stopped commissioning and even National Geographic, majority-owned by Disney, severely reduced the number of series it produced or co-financed. The withdrawal of Netflix had a significant impact on Bristol. The company pulled the plug on the third season of Silverback's *Our Planet* and ceased to fund its own Bristol-based company Wildspace causing that company to close.

Figure 25 *Ocean with David Attenborough* © Silverback Films

Silverback Films

Our focus on Silverback Films explores how one, established and highly respected, Bristol-based Natural History company has responded to these adverse market conditions and also extends *Go West! 2*'s focus on environmental issues. Silverback, like Plimsoll, has had to diversify but in different ways and it too has become part of a broader entity, All3Media, in December 2020. Silverback has found All3Media supportive, its acquisition based on an assessment that Silverback was successful and well-run and therefore should be given autonomy in its choice of which programmes to make and how to produce them. What the larger organisation offers is assistance in finding commissions and in negotiations about contracts alongside the possibility to collaborate with some of the other companies in its stable. Losing Netflix commissions has meant that National Geographic has become Silverback's main commissioner, which tends to offer full funding. Silverback also produced *Wild Isles* (2023) for the BBC, but in this case the financial shortfall was bridged by donor funding – the Royal Society for the Protection of Birds and the World Wide Fund for Nature (WWF). The recourse to donor funding was also mentioned by Plimsoll and several smaller companies as an increasingly important source of financing. Silverback's Joint Director, Keith Scholey, noted that as well as institutions, 'a lot of very rich people are interested in saving the world and are prepared to put money into wildlife programmes'. Obtaining donor funding often means there are less constraints about subject matter and approach and therefore a source of funding that is particularly welcome if the aim is to foreground the climate emergency. Donor funding also makes it easier for companies to 'repurpose' Natural History content on other platforms including YouTube and social media as in Silverback's 'Seat at the Table' series on climate anxiety.

In 2020, Silverback launched Studio Silverback (now Open Planet Studios) to make 'films that tackle the world's pressing environmental challenges'. In 2024, the company became a separate entity so that it can operate more like a Community Interest Company, independent of its parent and of All3Media. However, the companies co-operate on joint projects including *Ocean with David Attenborough* (2025), also donor-funded, which was released in cinemas by Altitude Films, streamed globally by National Geographic/Disney+ and distributed by All3Media. Watching the film at Bristol's IMAX theatre on 13 June was a harrowing but unforgettable experience as the hugely destructive effects of bottom trawling filled the screen. The noted environmental activist, George Monbiot, who once worked for the NHU, embraced what he called 'the film I've been waiting my whole career for'. As he points out, *Ocean with David Attenborough* has the courage, unlike the BBC's *Blue Planet II* (2017), to identify the fishing industry as the main threat to the marine environment.[63] At the invitation of the Prime Minister Sir Keir Starmer, *Ocean with David Attenborough* was shown at the House of Lords on 6 June 2025 for ministers, including the Environment Secretary Steve Reed, its release timed to coincide with the United Nations Ocean Conference in Nice (9–13 June). A change in government policy to extend the size of Marine Protected Areas, announced 9 June, was partly attributable to the film's impact. A visceral, uncompromising film with a direct purpose that also afforded audiences the prospect that marine destruction could be reversed and that the seas could recover quickly if properly managed, *Ocean with David Attenborough* proved that Natural History is not an exhausted genre, and that wildlife programmes can continue to make an impact, be innovative and challenging, make audiences excited again and reinvigorate the market.

Ocean with David Attenborough *proved that Natural History is not an exhausted genre, and that wildlife programmes can continue to make an impact, be innovative and challenging, make audiences excited again and reinvigorate the market.*

Figure 26 *Planet Earth III* © BBC Studios

BBC Studios Natural History Unit

Established in 1957, the Natural History Unit (NHU), now BBC Studios Natural History Unit, is the world's largest producer of Wildlife programmes and continues to dominate Bristol's screen ecology forming 13.8% of the total aggregate turnover. Although most closely associated with the 'landmark' series that began with David Attenborough's *Life on Earth* in 1979, the NHU produces a range of programming at various budget levels, including content for children. Productions such as The Watches series that began with *Springwatch* in 2005 are primarily made for the domestic market. However, most of the programmes produced, including major landmarks – *Frozen Planet II* (2022), *Planet Earth III* (2023), *Mammals* (2024) and *Asia* (2024), plus series like *Big Cats 24/7* (2024) – are funded through co-producing with a range of international partners, such as PBS and BBC America and European PSBs including ZDF (Germany) and France Télévisions. Having the BBC as a commissioner acts as a marker of quality, ethical probity and reliability that attracts other investment partners and gives commissioners confidence. Landmark series are designed for a global marketplace; *The Green Planet* (2022) was sold in almost 150 countries. Since *The Year the Earth Changed* (2021) for Apple TV+, the NHU has worked on commissions from several streamers including Netflix and Disney+ and, most recently, *The Americas* (2025) for NBCU. A recent BBC report, *Bristol Economic Impact* (2024), noted that over half the NHU's commissions (by value) now come from organisations outside the Corporation.[64] Apart from returning revenue to BBC public service, the NHU's programmes are considered to have additional benefits. The same report claimed that 75 of the NHU's commissions between 2019 and 2022 attracted inward investment and thus for every £1 the BBC invested, £1.86 was invested by third parties (p. 13). *The Green Planet* contributed £7.4 million GVA to the UK economy and supported over 50 FTEs (p. 16). More speculatively, the report draws on a BBC commissioned report by SIMITRICA-Jacobs, which argued that such programmes created improved wellbeing and triggered a range of positive behavioural changes in its viewers, estimated to be worth £134.7 million, and a further £108.1 million based on willingness to pay for social and environmental benefits (p. 17).[65]

Despite its size and reputation, the NHU has not been immune from the effects of the boom-and-bust cycle that is the principal theme of this report. After a surge in production as projects delayed by the pandemic went into production in 2021 in which its staffing rose to a record 450 FTEs, the last two years have seen a notable decline in commissions both from streamers and broadcasters whose budgets are stagnant or declining.[66] Around 30 job roles were closed in March 2024 and a further 34 in January 2025, amounting to 17% of the NHU's workforce.[67] In interview, Jonny Keeling, the current Head of the NHU, identified the production downturn as the principal challenge in what is becoming a 'very turbulent commercial marketplace'. Although he considered that the streamers continued to value Natural History programmes, Keeling opined that they have become much more selective about what series they commission, conforming to the industry mantra of 'fewer, bigger, better', looking for series that are exceptionally innovative but at the same time made on reduced budgets.

Figure 27 *Frozen Planet II* © BBC Studios

This reduction in numbers has a direct effect on staffing levels. Like others, Keeling commented on the cautious nature of some commissioners, making it difficult to depart from the tried and tested.

In response, the NHU looks to continue its tradition of technological innovation, improve audience reach and levels of engagement and to diversify. A central team works on new technologies but changes are usually made in response to the specific needs of a series: the motion control timelapse photography used in *The Green Planet* to show the growth and behaviour of plants for the first time, or the enormous level of detail required for the *Hidden Planet* series, currently in production, that depicts microscopic insects. Teams are making use of AI but as a workflow tool (such as sorting and tagging voluminous footage) rather than replacing 'the detailed nuance and understanding' that result from years of experience. Without sacrificing factual accuracy, forthcoming NHU series will, in Keeling's words, 'borrow the clothes of drama', creating audiences' emotional engagement with empathetic characters and deploying cliffhangers and an overarching narrative arc to increase interest. 'Heroes', the final episode of *Planet Earth III* (2023) used the crime drama format to tell the story of the illegal ivory trade. The forthcoming *Kingdom* (Autumn 2025) was filmed in one location dwelling on the lives of four animal families in a departure from the established structure of interlinked but separate ('closed') episodes. As with the other companies we have discussed, the NHU is looking to diversify its output further, particularly, into 'adjacent' genres such as adventure and travel, and to extend its social media reach. In January 2025 Sreya Biswas was appointed to the newly created role of Director of Programmes, with a remit to help the NHU diversify its output and win new business.

The NHU is also seeking to diversify its storytellers. Launched in 2022, Project Songbird is an ambitious initiative that offers in-country training and mentoring for local talent (the countries in which the NHU habitually films) and, in the longer term, to build an equitable, diverse, sustainable filmmaking industry for the future. So far Songbird has supported 32 people across 21 countries and 16 productions as well as engaging with many more through in-situ screening events and festivals, such as the Wildscreen festival in Botswana in June 2025, Wildscreen Tanzania (2024) and Wildscreen Kenya (2023). BBC Studios has also fully sponsored four overseas students through the UWE Wildlife MA. Songbird is an inclusive project that brings alternative knowledge and perspectives – 'helping to generate new stories and ideas we would never find or locations we could never get to'.

Case Studies

Case Studies

Atomic Television

We start this section with Atomic Television because the company is both very recently formed and exemplifies many of the major themes of this report. Atomic Television was founded in January 2023 by Stephen McQuillan with the aim of producing premium specialist factual content within the genres of history, science, adventure and documentary. McQuillan's key hire was Trevor Manning with whom he had worked at Icon Films. They have complementary skillsets. McQuillan is the dealmaker, having held several senior production roles, including with the Twofour Group and the BBC, before joining Icon. He is an established figure in Bristol, having worked there since 2013. Manning is a respected historian, particularly military history, whose focus is on programme content.

Atomic Television forms part of the Zinc Media Group, a market leader in Factual, consisting of eleven companies described on its website as a 'dynamic ensemble of distinct labels, each crafting unique content across a variety of genres for both UK and international broadcasters'. Atomic Television was Zinc's first Bristol-based production label, enabling the group to tap into the established pool of factual filmmaking expertise in the South-West region.[68] Being part of Zinc Media offers shared sector intelligence but the principal value is that Zinc handles the practicalities of running a business (insurance, budgets, accounting and so on) centrally leaving McQuillan and Manning free to concentrate on development, making the deal and producing the content, working from a small office in one of the old coach houses at the back of Redcliffe Parade.

Figure 28 *The Infinite Explorer with Hannah Fry* © Atomic Television

Atomic Television's representativeness stems from its accelerating turn to the digital marketplace to find new income streams as advertising revenue moves increasingly from conventional television to social media or streaming where the main audience is now located.

Atomic Television's representativeness stems from its accelerating turn to the digital marketplace to find new income streams as advertising revenue moves increasingly from conventional television to social media or streaming where the main audience is now located. McQuillan exemplifies the new (or reinvented) model of the television producer who is required to be a 'distribution strategist' alongside the role's traditional creative responsibilities.[69] The company's recent programme for Channel 5, *The Day Diana Died* (transmitted on 30 August 2025), a single commission from a legacy broadcaster, was an exception because the funding for the majority of its productions are derived from multiple sources; much of McQuillan's time is spent considering how to deliver content to diverse audiences across various platforms. Media companies operating in the digital space must learn to 'let go of exclusivity' and collaborate to ensure programming can be monetised on as many platforms as possible. It requires McQuillan to be pragmatic and entrepreneurial, to chase clients and look for new sources of funding, 'to go out and do different deals … getting the budget together from as many different sources as we can'.

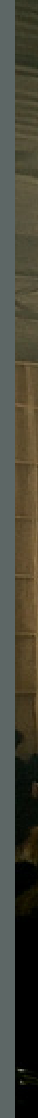
As an example, Ancestry.com part funded the forthcoming series *The Infinite Explorer* in which mathematician and television presenter Hannah Fry travels across six countries to reveal how each has been shaped by geography, climate, history and culture. It will be screened on National Geographic and also Bloomberg that will promote the television broadcasts but also place the series' ancillary content on its multiple social media channels, becoming available to a potentially huge audience. In McQuillan's estimation, the companies which survive in the 'new normal' will be those that have particular connections or a specific niche but also that can make programmes at lower cost with reduced overheads. Atomic Television's attempts 'to expand into some of the more fruitful areas of the digital world', requires learning new strategies to create a viable business where the income is not paid upfront but is backloaded and longtail. The company now delivers programmes horizontally and vertically, and is learning the new grammar of making short pieces in which 'You've got 20 seconds to get people in. There's no room for excess commentary or anything like that.' Survival requires asking difficult questions: 'What does our company bring to this world? How are we placed to create content that people are going to come to?' However, there are huge incentives: the digital space is one in which audio-visual content is being consumed at a greater rate than ever before, is less restricted by traditional commissioning precepts and where there has been an exponential growth not only on YouTube but in podcasts where many historical programmes have taken off.

Figure 29 Virtual Studio © Studio Giggle

Studio Giggle

Occupying a three-floor building on the Paintworks site, Studio Giggle is not a new company; it has been operating for twenty years creating both live events, animation and award-winning content, establishing a reputation as technologically innovative. As with Atomic Television, Studio Giggle is included here as part of our focus on adapting and diversifying in order to remain viable in a digital world. Its founder and Creative Director is Steve Garratt, supported by the marketing and business knowledge of Rob King as CEO and the entrepreneurial abilities of Jonathan Brigden as Managing Director. Brigden commented in interview that the incentive for Studio Giggle to establish itself in Bristol was its wealth of experienced talent, but also, because 'everyone is much more friendly than in London, much more chatty and open to collaboration'. Studio Giggle created the launch video for four seasons of *Game of Thrones* and, in the last three years, made content and full production for an annual series of live events run by a global private equity firm. More recently, Studio Giggle has become the preferred partner of Manchester United creating a series of virtual events.

When the pandemic struck, Studio Giggle had to change rapidly to virtual production, using money from the Covid Recovery Fund to purchase equipment and retrain its staff. In April 2023 the company expanded, financed by a loan from Creative UK, through establishing Distortion Studios, taking over the site in Avonmeads vacated when Band Films Studios ceased trading. This development makes use of technological developments pioneered in the games industry such as Unreal Engine, which enables the creation of virtual sets with greater control in which backgrounds can be changed radically by a few adjustments to the settings, bringing down costs and offering enormous flexibility.[70] Recently, Studio Giggle has begun to work more extensively with the university sector, including The Sheds after receiving a grant from MyWorld (see pp. 60–61) to develop volumetric workflows within virtual production in collaboration with the Centre for the Analysis of Motion, Entertainment Research and Applications (CAMERA) at the University of Bath.



Patchway Studios

Aside from The Bottle Yard's £12 million state of the art TBY2 facility which opened in November 2022, another notable and ambitious new studio development in the region is Patchway Studios, which opened in May 2022 in South Gloucestershire, on the northern edge of Bristol. The site offers 100,000 sq ft of flexible production space, including two 20,000 sq ft stages capable of accommodating everything from smaller-scale shoots to large, high-end productions. Patchway Studios were designed in consultation with crew and industry experts to ensure functionality and efficiency to reflect the practical needs of those who work in production day-to-day and can accommodate multiple smaller productions or a full-site takeover. While its facilities are high-spec, they are priced at a mid-level to be highly competitive, especially when compared with equivalent spaces in London. Productions filmed at Patchway include *The Winter King* (Bad Wolf for ITV Studios, December 2023) and series one of *The Crow Girl* (Paramount+, January 2024). Patchway has also supported productions based at The Bottle Yard Studios with various location and unit base parking needs, (e.g. *A Good Girl's Guide to Murder* (BBC, Moonage Pictures), *Down Cemetery Road* (Apple TV. 60Forty Productions), *The Forsytes* (ITV, Mammoth Screen) and Adidas RS15 AvaGlide Rugby Boot (Adidas, Our House), which demonstrates the site's flexibility and capacity to support both high profile dramas and fast turnaround commercial shoots.

> Bristol and the South-West is one of the most dynamic production hubs in the UK, because of the region's 'fantastic momentum' in attracting high-end productions, its highly experienced crew base and diverse range of locations.

Sam Glover, founder of SG Capital Partners, commented that they invested in the project because Bristol and the South-West is one of the most dynamic production hubs in the UK, citing the region's 'fantastic momentum' in attracting high-end productions, its highly experienced crew base and diverse range of locations. The specific site was chosen for its excellent transport links, close to both the M4 and M5 motorways, Bristol Parkway mainline station with fast connections to Wales and London, and proximity to major crew bases in Bristol and South Wales. Patchway received a Filming in England and British Film

Commission grant to undertake a detailed site study and develop a masterplan that addressed local community needs. Like many Bristol-based companies, Patchway collaborates closely with others in the regional production ecosystem, providing unit base and support services to productions filming across the West of England, the Midlands and South Wales. Patchway Studios currently operates in partnership with Story Works in Mortlake, West London, offering productions flexibility at either end of the M4 corridor. Ambitious plans are in place to quadruple capacity over the next three years, with Patchway serving as the first project in an international investment strategy to develop a network of highly sustainable studios across the UK and Europe, targeting a combined one million sq ft of production space.

In interview, Glover outlined a vision to build studios in prime locations where producers and crews can deliver productions efficiently, with all necessary facilities at an affordable price. The strategy creates economies of scale, enabling the group to focus on delivering exceptional service and value to productions of all sizes. Patchway Studios is guided by a committee of advisory board members, including experienced Heads of Department in physical production, producers, and studio operators. The studio also recently appointed Laura Aviles as Industry Advisor following her five-year tenure as Head of Film at Bristol City Council. Aviles' expertise is helping raise Patchway's profile and support the continued growth of scripted production in the West of England.

Figure 30 Patchway Studios interior © SG Capital Partners

Local and Regional Authorities

Local and Regional Authorities:
Bristol City Council (BCC) and the West of England Combined Authority (WECA)

The 2022 *Go West!* report emphasised the interconnectedness of the three components of Bristol City Council (BCC)'s Film Services: Bristol Film Office (BFO); The Bottle Yard Studios (TBYS) and Bristol's UNESCO City of Film designation. These three services also work together with the regional authority, WECA. In combination, they offer a focal point for the sector and a range of support, which included orchestrating measures to help the sector's recovery after the pandemic. The Report considers each service in turn, identifying the most significant developments that have occurred since our last report. As they are quite extensive, we have given appropriate space to discuss those changes in detail. This section concludes with a consideration of two examples of cross-cutting skills initiatives that are co-ordinated across the three teams and exemplify regional priorities.

Bristol's established reputation amongst domestic and international producers as a supportive, film-friendly city with a coherent Studio and Film Office offering, helped mitigate some of the worst impacts of the global 2023/24 production slump.

As mentioned, BCC's Film Services helped co-ordinate post-pandemic recovery in the city's screen sector. The earliest type of activity to get up and running again was location and studio filming of scripted content, and TBYS and BFO together facilitated this rapid, very sharp post-pandemic surge. Bristol and the South-West's role in the UK industry was further cemented in November 2020 when it was named by the British Film Commission as one of seven UK production hubs, as part of a national strategy to boost regional film and TV production and create local infrastructure.[71] This pronounced upward trajectory in scripted production was increased by the opening of The Bottle Yard's second studio facility (TBY2) in November 2022 (discussed below) and has continued since our last report. Bristol's established reputation amongst domestic and international producers as a supportive, film-friendly city with a coherent Studio and Film Office offering, helped mitigate some of the worst impacts of the global 2023/24 production slump. Even at the peak of industry slowdown, Bristol continued to attract a strong pipeline of scripted titles, perhaps also thanks to its proximity to London combined with competitive pricing that suited tighter budgets. The economic impact of production activity at TBYS and BFO-supported locations has increased year on year since our last report; and in 2024–25 was worth £46.6 million to the city's economy, an increase of 55% on the previous reporting period. (See Inward Investment figures on p. 25).

Figure 31 TBY2 entrance © The Bottle Yard Studios

Bristol Film Office

Established in 2003, the Bristol Film Office (BFO), which marked 20 years of operations in 2023, provides logistical support for productions seeking to film in the city. The BFO also implements the Council's emphasis on social value, diversity and inclusivity by encouraging companies filming in Bristol to adopt sustainable practices wherever possible and to include local talent. The BFO liaises closely with its counterparts in other local authorities, including its closest neighbours Bath Film Office and North Somerset Film Office, as part of a concerted effort to encourage screen sector activity into the West and South-West region. It is also a member of the Film Office UK Network, supported by Filming in England, that meets regularly to exchange intelligence.

BFO staffing has increased since the previous report. Adela Straughan was appointed BFO Manager in 2022 after Natalie Moore, who held the post between 2007–2022, was appointed to the post of UNESCO City of Film Manager. The addition of a BFO Locations Assistant post alongside the existing Film Liaison Officer was a result of the sharp increase in location filming seen across the city post-pandemic discussed above. The importance of BFO's strategic role has grown as new Film Offices have opened around the UK, increasing the need for BFO to liaise with more city stakeholders to bring more private land and property into the portfolio of locations on offer to filmmakers. For example, access to Unit Bases continues to be a highly influential factor for productions when deciding where to base, and following agreements brokered by BFO in 2025 there are now arrangements in place with three 'Park and Ride' sites to be used for this purpose – ensuring the city remains competitive for filming.

BFO has also increased its engagement with local charities and community groups (for example St Werburgh's City Farm and Underfall Yard) to enable more unique spaces to become available for film shoots that help those sites generate additional revenue streams amidst a challenging financial climate. Following the launch of Visit Britain's national Starring Great Britain campaign in 2025, BFO also collaborates closely with Visit West to maximise screen tourism opportunities that will increase footfall to key locations seen on screen across the city, bringing further benefit to businesses across the wider local economy.

The Bottle Yard Studios

The Bottle Yard Studios (TBYS) was established in 2010, one of only two studios owned and run by local authorities, the other being Elstree Studios in Hertsmere, part of London's metro region.[72] Located in Hengrove, TBYS has a cultural and civic role as well as an economic one, functioning as an element in the regeneration of South Bristol and engaging in a range of local partnerships for training and research. Our 2022 report noted the imminent opening of TBYS's expansion facility TBY2, housing three state-of-the-art soundstages at the nearby Hawkfield Business Park, funded by a £11.8 million WECA investment: 50% grant and 50% repayable loan to BCC. TBY2's opening increased The Bottle Yard's overall capacity from 8 to 11 stages. The increase in production activity at the original site coupled with the opening of the second site necessitated increasing staffing from 4 to 12. TBYS can now offer a range of facilities across its two sites, from affordable non-soundproofed stages in converted warehouses at its original site (TBY1) that are suited to the budgets of low-to-medium UK indigenous productions, through to fully soundproofed, air heated and cooled stages at TBY2, suited to higher budget productions that are often UK-US commissions from streaming giants like Disney, Netflix and Apple TV. The number of productions using spaces at both TBY1 and TBY2 may well increase following the government's introduction of the Independent Film Tax Credit from 1 April 2025.

A Green Team was established in 2020 to implement a five-year Sustainability Strategy; since our last report TBYS has become increasingly well-known across the industry for its uncompromising approach to embedding sustainable practices, best illustrated by its community-owned 1MW solar array, funded by the Bristol Energy Cooperative, which, at the time of its 'switch on' in November 2022 was the biggest solar rooftop on any UK studio and is the UK's largest community-owned PV rooftop. Generating more energy than TBY2 requires, its partnership with Bristol's City Leap network means that surplus energy is sleeved to other buildings in the city, helping Bristol achieve its net-zero goals. The project won Best Sustainable Initiative at the 2023 Global Production Awards at Cannes Film Festival.

The economic impact of production activity at TBYS and BFO-supported locations has increased year on year since our last report; and in 2024–25 was worth £46.6 million to the city's economy, an increase of 55% on the previous reporting period.

Figure 32 The Bottle Yard Studios interior © Bottle Yard Studios

Figure 33 The Bottle Yard Studios Studio Sustainability Award © Global Production Awards 2023

TBYS shares comprehensive sustainability resources with the productions it hosts, including a Sustainability Toolkit (which includes TBYS's Waste Management Strategy, Digs List and Local Suppliers List) and Production albert Evidence Pack (a template designed to help productions complete their own production albert accreditation as easily as possible). As a council-run facility, it also encourages production company clients to crew up locally, above and below the line, wherever possible. This includes directors and HoDs, many of whom have historically been 'helicoptered in' from London for visiting productions and have used their own teams. The uptake of local crew on incoming productions has improved. For example, ITV Studios estimated that during production of Disney's *Rivals* series one, approximately 90% of talent and crew were local to the West of England.[73] However, there is still room for progress and data remains hard to obtain, unless requested on a case-by-case basis. TBYS has also been successful in encouraging more of its clients to go a step further and base their post-production workflows in Bristol rather than use London's firms. TBYS' Tenant Hub continues to be a significant cluster of companies in the city, with 15 permanent businesses on site employing approximately 60 FTEs.

Its strong focus on sustainability and supporting Bristol's wider film ecosystem has helped TBYS garner widespread industry recognition. In addition to winning the Sustainable Initiative Award at the 2023 Global Production Awards, TBYS was a crucial factor in Bristol winning the 2024 City of Film Global Production Award (noted below). In 2025, TBYS also become one of 5 worldwide finalists in the Awards' Studio of the Year category (losing out to Toronto's Cinespace). Perhaps the most notable achievement in this field came in March 2025 when TBY2 was named the most sustainable studio facility in the world, scoring higher than over 30 participating facilities in the global 2025/26 BAFTA albert Studio Sustainability Standard, achieving an 'Outstanding' rating alongside the TBY1 site's 'Excellent' certification.

Throughout BCC's governance review process (detailed below), TBYS has remained fully open for business, maintaining a strong booking slate that has featured full studio shoots for increasingly high profile titles, including *Rivals* (Disney+), *Down Cemetery Road* (Apple TV+), *The Seven Dials Mystery* (Netflix). *The Forsytes* (Channel 5/Masterpiece), *A Good Girl's Guide to Murder* (BBC/Netflix), *The Dream Lands* (BBC), *The Crow Girl* series two (Paramount+) and the feature film *Bad Apples* starring Saoirse Ronan. In September 2025, Katherine Nash was appointed Head of Studios. One of TBYS's founding employees, Nash previously served as Business Operations Manager between 2020–25, where she played an integral role in the operational design and delivery of TBY2 and was a driving force behind TBY2's 1MW solar rooftop array project. Working closely with BCC, Katherine will now play a critical role in business planning and future strategic growth of TBYS.

Market challenges

Like any UK studio, TBYS has been affected by the sector-wide pressures we have noted, including diminished budgets and productions needing to obtain third party funding which lengthens development time. As a result, its studios are being booked closer to productions' start dates, making medium-term planning more difficult. However, its main challenge historically is more specific: the lack of a regional production fund. On numerous occasions, TBYS has lost out on bookings to studios in Cardiff, Leeds, Liverpool and Manchester, cities which can all offer a direct financial incentive that can often be the deciding element when constructing a production budget, even if creative talent behind the content, or the physical setting of a storyline, is Bristolian or specific to the South-West. Whilst still yet to be approved at the time of publishing this report, WECA is in an advanced stage of feasibility planning to implement a Regional Production Fund (see next section). It is envisaged that this incentive will help Bristol level up to other nations and regions which already have funds and provide a forward-facing level of security for TBYS and local crew into the future.

BCC governance review

As a local authority-owned business operating in a commercial sector, TBYS is constrained by Council resources. Like all cash-strapped local authorities, BCC has very limited finance for capital projects, and most Studio infrastructure development depends on capital investment. For example, there is an opportunity to repurpose the four-storey central block on the original TBY1 site that was vacated in June 2024. With capital investment this could provide opportunity for expansion of services or businesses within the TBY1 site. Mindful of its straitened finances, in October 2024 BCC announced the decision to 'explore the option of identifying a potential buyer' for TBYS following acknowledgment from officers that despite its position as 'one of the most prominent drivers in the international success of our local industry and a catalyst for new jobs and opportunity along the sector supply chain',[74] TBYS's current ownership model had led it to 'hit a glass ceiling'.[75] The Council was not looking for an outright sale but the purchase of a long leasehold to unlock greater investment opportunities and to expand the facilities but with the proviso that the contracts of existing staff and 15 on-site companies were guaranteed; that the studios continue to operate (and develop) without reducing its local and regional focus or its emphasis on sustainability and social values; and that it continued to work closely with BFO.

However, in July 2025 BCC announced that although a preferred bidder had been identified and detailed plans had been drawn up, it had not been possible to conclude an agreement for the sale of the leasehold of the studios and further efforts to find a buyer had been suspended whilst a further appraisal of options takes place.[76] The proposed sale had been controversial, attracting adverse criticism from Equity which complained of a lack of consultation with the industry. South-West Area Councillor Rachael Fagan commented: 'Had regular and meaningful consultation with freelance creative workers and their union taken place, I believe this painful process could have been avoided.

The 2024 UCCN Evaluation Report *highlighted the action plan's close alignment with SDG initiatives, its enhancement of film's role in shaping Bristol's identity and its dynamic, multicultural communities alongside a commitment to 'discover and harness new talent and connect education programmes with industry establishments across the city'.*

I encourage the Council to explore previously dismissed options for the Bottle Yard Studios, which prioritise public ownership, ensuring value for money for Bristol residents.'[77] Councillor Tony Dyer, Chair of the Strategy and Resources Committee at BCC, commented:

> 'This has been a necessarily lengthy process to ensure all possible factors are considered and that an extensive level of due diligence is carried out throughout. In the absence of an agreement being reached I have asked that officers conduct a further appraisal of the options for maximising the value and benefits of the studios before returning to our committee with further recommendations. We entered into this process with the objective of securing a sustainable future for the studios and the opportunity to grow into its huge potential. Those aims remain the same as does our determination to ensure that one of our city's most successful regeneration projects continues an upward trajectory to deliver more jobs and more investment for Bristol.'

At the time of publishing this report (November 2025), BCC is undertaking this new period of business options appraisal alongside focussed business planning for the Studios. The intention remains to ensure the long-term viability of the Studios and finding the optimum operating and governance model will be key.

UNESCO City of Film

Bristol became a UNESCO City of Film in October 2017, a permanent designation that celebrates the city's achievements and ambitions as a world-leading centre for film, television and the moving image. It connects Bristol to a global network of Creative Cities that champion creativity and cultural industries as powerful drivers of sustainable urban development and provides a strategic framework for shaping and monitoring city development activity rooted in the UN Sustainable Development Goals (SDGs) and the UN global cultural agenda. UNESCO Cities of Film form part of the UNESCO Creative Cities Network (UCCN), a growing global community that aims to strengthen cooperation amongst cities that recognise culture and creativity as key elements in developing resilient and sustainable urban development. There are currently 26 Cities of Film globally, the only other UK one being Bradford. The designation acts as an important marker of Bristol's international status as a screen hub as well as offering a unifying focus for the City's film sector ecology as part of Bristol's One City Plan. The initial four-year action plan, the *Bristol UNESCO City of Film UCCN Membership Monitoring Report 2017–21* (2023) focused on the variety of initiatives across the three areas that had shaped the application: Film Production, Film Culture and Film Education.[78] The Report highlighted the range of skills and training opportunities on offer, proactive initiatives increasing access and promoting diversity, inclusivity and sustainability and the lessons that could be learned from the pandemic. A detailed section reflected on Film for Learning, the screen literacy programme funded by Paul Hamlyn Foundation and delivered in partnership with Into Film, Bradford City of Film and Belfast UNESCO Learning City.

Figure 34 Bristol's Summer Film Takeover 2023 © Bristol UNESCO City of Film

The Report also emphasised the importance of telling local stories that recognise and celebrate Bristol's multicultural identity.

Since 2021, Bristol's UNESCO City of Film Action Plan (2021–25) has been shaped around four priority themes: Skills, Environmental Sustainability, Regional Storytelling and International Engagement. This framework has enabled a wave of impactful programmes and partnerships aligned with the commitments of the UNESCO Creative Cities designation. The 2023 Summer Film Takeover commissioned nine film-focused events across Bristol City Centre to support post-COVID high street renewal. These have ranged from pedal-powered screenings and animation workshops with Aardman to immersive installations and shorts projected onto Old City Walls. Events marked 75 years since Windrush, 50 years of Hip-Hop and 100 years of 16mm film, celebrating local stories and amplifying diverse voices. As noted previously, a new Writers Scheme, developed with Channel 4, BFI Hub South-West and local partners, supports emerging screenwriters from the West and South-West through mentoring and industry access.

As a City of Film, Bristol plays an active role on the international stage under the designation, presenting its programmes and achievements at UNESCO Creative Cities Annual Conferences in Brazil, France, Portugal, Spain and South Korea. Bristol's City of Film Manager and UCCN Focal Point, Natalie Moore currently serves as Deputy Coordinator for UNESCO Cities of Film worldwide, ensuring collaboration and recognition of the work of Cities of Film across the UCCN. The role will advance to Subnetwork Coordinator in 2026, leading Cities of Film engagement with the UCCN Secretariat and new member cities.

In addition to its permanent UNESCO City of Film status, Bristol won the coveted City of Film Award at the 2024 Global Production Awards at Cannes Fim Festival. The award was presented in recognition of outstanding and sustainable work in the world of film and television production, locations and studios. Judges praised the range and diversity of Bristol's screen sector, the steady flow of film and high-end television productions to the city and the concerted attempt to expand the sector whilst retaining a focus on managed growth and sustainability. Bristol was featured as one of only three global Creative City of Film case studies in the 2024 *UCCN Evaluation Report* which highlighted the action plan's close alignment with SDG initiatives, its enhancement of film's role in shaping Bristol's identity and its dynamic, multicultural communities alongside a commitment to 'discover and harness new talent and connect education programmes with industry establishments across the city'.[79] The next monitoring report will be published in 2027, which will cover the period 2022–26.

Cross-cutting skills initiatives

As mentioned, we will examine two examples of cross-cutting skills initiatives that are co-ordinated across BCC's three Film Service teams and exemplify regional priorities.

The first is the West of England Film and High-End TV Workforce Development Programme, launched in January 2024 and funded by a £300,000 grant from WECA. This year-long programme was open to regional participants from backgrounds currently underrepresented in the industry looking to break into behind-the-camera roles on scripted film and high-end television productions. The programme was devised in response to recommendations within the BFI's Skills Review (June 2024), Olsberg SPI's Workforce Development Report (July 2023) and Bristol's UNESCO City of Film Action Plan, discussed above, which identified the need to develop a local skills pipeline for scripted crew as a key priority for the region. The core programme was a specially designed free 5-week training scheme for 45 entrants delivered at TBYS, focusing on set etiquette and work-readiness, communication skills and teamwork, wellbeing and resilience, alongside developing the necessary digital and financial skills to work as a freelancer.

This development programme was followed by a second initiative, All Set West, a skills package initially funded for activity from April 2025 to June 2026 by a £245,000 grant from the BFI's National Lottery Places Fund.[80] The Places Fund aims to develop production centres across the UK by providing targeted funding to organisations to pilot new skills and training activity in their region and develop strategic plans that will increase film and television production in that area. The All Set West package includes a free training programme (following the successful format piloted under the Film and High-End TV Workforce Development Programme), and access to the All Set West Hub, an inclusive online platform with two types of log-in functionality; one for the 'All Set West Community' of local entrants who can access a range of information in one place about opportunities, events and resources to support their first steps in the industry, and another for 'Industry Connectors', established professionals from film/TV productions and other screen sector skills organisations who can upload call-outs for opportunities such as runner and work experience vacancies, or other beneficial training courses. The All Set West package also includes extensive outreach engagement with educators and community groups in the region to promote awareness of sector needs and opportunities. Alongside core delivery, a mentoring offer is being developed and a WECA-funded research element that will determine regional industry skills gaps to aid construction of future strategy.

Both these initiatives represent targeted funding obtained by BCC's Film Services, bespoke to the screen sector, which creates opportunities at a microlocal level, which, we argue, are much more likely to succeed than more general educational and training initiatives.

The West of England Combined Authority (WECA)

The West of England Combined Authority (WECA) was created in 2017, and the creative industries have become an increasingly important focus within its strategies. Under the leadership of Helen Godwin (Labour), the authority has taken a more proactive approach to investment and governance in this sector, with the creative industries recognised as one of the priority growth areas in the new West of England Growth Strategy.[81] The Growth Strategy identifies 'Create Growth West' as a central investment theme, highlighting opportunities to scale the creative industries, enhance cultural and heritage assets, and expand film and television production. This initiative draws on the impact of flagship initiatives delivered over the past five years, including the Create Growth Programme, a DCMS-funded scheme providing tailored support to help high-growth creative businesses access finance and scale, and Culture West, a £3.1 million programme co-funded by Arts Council England, WECA and regional partners. Culture West is creating new pathways into the arts, commissioning festivals and cultural events, and supporting diverse emerging talent and freelancers, while also strengthening the region's cultural infrastructure.

WECA is one of six regions – and the only one in the south – selected to receive investment from the £150 million DCMS Creative Places Growth Fund, which will launch in April 2026.[82] While details are still being developed, the fund will support high-growth creative sectors, particularly film and television. Plans for the fund will be co-designed with partners and the industry, with a strong focus on nurturing local talent, supporting diverse and sustainable growth, and ensuring the region has a clear voice in national discussions about the future of the creative economy. At the time of writing, WECA is co-designing plans for supporting the screen sector, which include proposals such as a regional production fund, discussed in the previous section, and a screen development body.

Training Providers

Training Providers

Gritty Talent

There are a number of training providers in the region such as TBYS and Boomsatsuma, but for reasons of space, we focus here on Gritty Talent whose central aim, as defined by its founder Mel Rodrigues,

> is creating really inclusive and accessible pathways for talent both into TV, film and wider digital and creative professional, as well as their onward steps. We work a lot on the progression and retention of talent, to make sure productions are removing blockers and barriers for people who might have bigger obstacles before they can really get to where they want to be in their creative career.[83]

Rodrigues has moved on to a role at Creative Access but Gritty Talent, now run by Reema Lorford (CEO) and Phoebe Sinclair (Managing Director), continues to provide talent matching services, consultancy and training to help companies and freelancers meet the challenges of a rapidly evolving sector.

Gritty Talent is deeply embedded in regional networks built over a number of years and its staff have had extensive experience in the television industry. This enables it to access and engage communities that are often overlooked by 'traditional' recruitment methods. Gritty Talent specialises in bringing new people to production companies and expanding talent bases and networks from which its clients can improve representation and diversity within their teams. It provides a range of training programmes such as the MyWorld/WECA funded Virtual Production Skills Bootcamps catering for those at an early to experienced career stage; and the Inclusion Accelerator Bootcamp for senior level staff; and worked with UWE Bristol on a report that explored accessibility provisions and anticipated needs of Deaf, Disabled and/or Neurodivergent media professionals within Bristol's screen industries.[84] All such programmes are designed to boost EDI awareness and drive transformational change in workplace culture within the region and across the sector. Gritty Talent works with a wide range of clients including PSBs and streamers, independent production companies across the sector, universities and national organisations such as ScreenSkills and the British Film Commission.

Figure 35 2024 Film and High-End TV Workforce Development Programme © Bristol City Council Film Services

Although Gritty Talent responds to the sector's priorities identified in Diamond's annual reports, these do not capture regional variations that are often widely divergent. This is a further reason for the existence of an organisation that has a strong regional focus, thereby well placed to suggest meaningful interventions that make sense for the South-West. Gritty Talent sees the sector's principal priorities over the next 3–5 years as being the provision of sustainable careers, particularly, as this Report has noted, because of the squeeze on the middle-ground, those returning series that provided long-term employment and stability. They consider that existing talent and prospective new entrants must recognise that the expectation of a linear career is now outmoded; companies and freelancers need to embrace the digital spectrum of proliferating platforms and cultivate a diverse portfolio.

Research and Development

In our overview discussion of the UK's screen industries, we drew attention to the scope and pace of technological change. Although, as already noted, there are pockets of R&D located in the larger companies – the BBC, Channel 4, Aardman Animations and Plimsoll Productions – most of Bristol's small or micro businesses do not have the capacity or the resources to engage in research, hence the importance of the region's four universities. There are several initiatives, including CAMERA at the University of Bath, and the Bridge Studios (UWE) that comprises a virtual production capability, fabrication support for prototyping, and an immersive technology suite with VR and AR systems that can be integrated with robotic, manufacturing and performance. We review in more detail what has been the principal R&D initiative, MyWorld.

MyWorld

Launched in April 2021, MyWorld is a six-year R&D programme funded by £30 million from the UKRI Strength in Places Fund (SIPF) supplemented by further funding from its thirteen partners: the four regional universities together with industry and academic organisations. The SIPF award was significant not just because of its scale but also through its attempt to explore the potential of devolved funding, a place-based approach that would build on local strengths and the R&D undertaken by previous initiatives such as REACT (2012–16), the South-West Creative Technology Network (2018–22) and the Creative Industries Clusters Programme(Bristol + Bath Creative R+D 2018–24)that established an embedded regional network of innovation and expertise in creative technologies. MyWorld, led by Professor David Bull, is a sister project to the Bristol Digital Futures Institute, a ten-year initiative funded by Research England to develop cutting-edge digital facilities and ecosystems. MyWorld is housed in the Temple Quarter Enterprise Hub, a conversion of the Retort House (1821) and Coal Shed (1850), originally part of the Bristol Gas Light Company, which first brought gas and gas lighting to the city, referred to colloquially as The Sheds.

Figure 36 MyWorld Virtual Studios © Jon Craig

With input from the other regional universities and a range of local and international partners, MyWorld attempts to forge a 'Centre of excellence for creative technology research and development', by offering training and expertise to enable businesses to realise their 'innovation potential' and maximise the advantages of new technologies – visual computing, virtual production, motion capture, volumetric capture, audio recording, live video broadcast, audience monitoring, signal processing and network distribution – and in the process position the West of England as a global leader in live, immersive experiences. It has equipment that can, for instance, capture unparalleled insights into audience immersion via an array of biometric sensing equipment in its unique Smart Cinema together with edit suites and production galleries and on-site computer and storage facilities. The MyWorld programme provides industry short courses that offer opportunities for businesses of all sizes to discover the potential of these cutting-edge technologies, otherwise impossible alongside their pursuit of commercial commissions, and to collaborate and share knowledge, together with longer-term research projects. Its aim is not simply to ensure that the West of England remains at the forefront of creative technology development but to generate new business models that would enable the sector to shift towards more collective and mutually supportive modes of production.[85] MyWorld also helps organise international gatherings designed to raise the profile of the region's creative economy internationally. The challenge is now to ensure that these initiatives are sustained once its current funding finishes in 2027.

A Regional Supercluster

Research on the feasibility of a Creative Technology Supercluster connecting WECA with the Cardiff Capital Region (CCR) that includes Newport (a combined population of c. 2.5 million) has been undertaken as part of the Creative Industries Clusters Programme (2018–23) and its sister project Media Cymru in Wales. The latest report (October 2024) contends that combining the two regions makes economic sense because the growth of the creative industries in the projected supercluster exceeds the national average and its GVA would be greater than those of the principal northern cities combined.[86] The report argues that a supercluster has the potential to combine and 'amplify' established regional strengths providing economies of scale that would increase future growth and enhance the region's status nationally and internationally. Superclusters or 'creative corridors' help to stimulate economic growth by strengthening linkages, be they supply-chains, research and development partnerships, or networks of people in the labour market. The development of a polycentric supercluster aligns with government thinking, as described in *The UK's Modern Industrial Strategy*, that superclusters or 'creative corridors' will drive growth by building on and enlarging 'successful' city regions.[87] The Government's Creative Places Growth Fund mentioned above, pledges to support the development of a West of England-South Wales Creative Corridor.[88] This development also aligns with the contention of the Centre for Cities report *Big Cities in the UK and G7* (June 2024) that, outside London, UK cities are too small to be globally competitive and therefore need to combine strategically to form inter-dependent city regions.[89]

The Supercluster report recognises the pronounced problems in harmonising a devolved nation with an English region whose powers, autonomy and structures of governance are asynchronous. To address this issue, it proposes a 'supra-regional' leadership forum consisting of representatives from WECA and CCR, industry bodies and universities alongside an advisory panel that would take a strategic view of the super-cluster's priorities for a ten-year period. However, it can be argued that the report rather underplays the cultural problems, the centuries-long mistrust, even animosity between these two adjacent cities, Bristol and Cardiff.[90] This antagonism has been exacerbated since 2000 by the perceived imbalance between the funding available for the screen industries in Wales as opposed to the South-West that enjoys far more limited government funding. Overall, there is no English equivalent to the support and funding provided by the devolved nations' screen agencies; provision is patchy and, in some regions, including the South-West, non-existent. This imbalance was a recurring gripe in our interviews for this Report and there was little support expressed for such a supercluster. One interviewee commented: 'the regions and nations have very different needs and they operate in a very different way'.

Conclusion

Reports are, of their nature, moments in time analysing the particular and pressing issues at that juncture. In contrast to our two previous reports, which documented an expanding sector that seemed ‘poised to have a thriving future’, our analysis of these three ‘turbulent years’ has shown that this upward trajectory has been superseded by a boom-and-bust period, much more dramatic than the sector’s habitual cyclical fluctuations. Our report has documented the impact of these sector-wide changes that have destabilised Bristol’s screen ecology exposing its dependency on the international market through its concentration on high-end Natural History programmes and the deleterious effects of a decreasing, narrowing, risk-averse range of commissions. These reductions have hit smaller and specialised production companies the hardest, forcing over 50 to close and profoundly affecting the employment, wellbeing and future of Bristol’s freelance community. Despite this adversity, we have also shown the resilience of Bristol’s ecosystem and the efforts that are being made by companies, the PSBs (the BBC and Channel 4), local authorities, training providers and research and development initiatives to help sustain the sector. In the next section we present a detailed summary of our findings.

Throughout compiling this report, we have been mindful of our epigraph quotation about the importance of ensuring a ‘cycle of renewal’ and its argument that the UK screen ecosystems are ‘complex and finely balanced and future growth and sustainability are not guaranteed’, which we have shown to be true of Bristol’s screen ecology. In our final section, we make a series of seven Recommendations that we consider would strengthen Bristol’s ecology and help to secure a healthy, stable and sustainable future.

Findings

1 Bristol's film and television cluster currently consists of 198 independent production companies (indies) and two public service broadcasters: the BBC (a local news facility and BBC Studios on separate sites) and Channel 4. These indies continue to be astonishingly varied but in terms of size, the overwhelming majority are micro or small businesses. Although the seven sub-sectors identified in previous reports – Animation, Branded Content, Drama, Facilities firms (including studios), Factual, Natural History and Post-Production – remain meaningful categories, one of the principal findings of this interim report is that companies are diversifying in response to market contractions and shifting their focus into the digital arena as the market in broadcast television continues to contract.

2 Bristol's core strength continues to be its pool of expert labour, its established network of partnerships and co-operation, and its forward-thinking readiness to embrace change, building on the city's historic traditions of self-help, entrepreneurial and technological inventiveness. Co-location in a tightly packed cluster facilitates the flow and exchange of new ideas, knowledge and innovation, and social and cultural as well as economic capital. Competitive companies continue to co-operate through, for example, the exchange of freelance talent, to ensure that expertise remains in the region rather than migrates elsewhere and to resist the gravitational pull of London as the UK's dominant media centre.

3 The 'continued growth' reported on in 2022 has not materialised. Rather, what this 2025 Report demonstrates starkly is a dramatic boom-and-bust cycle that has created instability, company closures and severe economic and wellbeing problems for the freelance labour on which the region depends. Although the long-established specialism in Natural History continues to be the region's core strength and the basis of its international reputation, this sector has been particularly hard hit, revealing the problems of being dependent on international finance. The region's PSBs, the BBC and Channel 4, have also experienced difficulties – the freezing of the licence fee and the downturn in advertising revenue respectively – at a national level that has constrained their commissioning power and made companies increasingly risk-averse.

This decrease in the number of commissions and the reduction in budgets has exerted further pressure on regional indies, especially those operating in the 'squeezed middle' that look to returning early evening series for long-term stability. Although BBC Studios has been relocated in high quality facilities, there has been no equivalent investment in local news provision.

4 Despite these severe difficulties, the region's film and television industries continue to be economically significant to the region with an aggregate turnover of £325 million in 2025. This is an increase of £37 million from the 2022 figure (£288 million), a rise of 11.38%. The screen sector continues to contribute to the region's cultural health, cultural tourism, its civic communities and its international status.

5 Although there have been significant casualties – 53 companies have closed – Bristol's film and television industries have proved to be resilient. Companies are diversifying to widen their portfolio of projects and revenue streams, and many are proving to be agile and adaptable enough to take advantage of the sector-wide 'pivot to digital', which poses many challenges but also a raft of new possibilities.

6 A more far-reaching problem is the labour pool. Although our report focused on companies, we became acutely aware of the severe difficulties – lack of security, anxiety and wellbeing – experienced by freelance labour in particular, a regional problem that mirrors the national picture. As freelancers retrain and permanently move to other sectors, and young talent is dissuaded from entering, the long-term future of the sector is at risk; this issue may intensify over the next year as smaller, more diverse companies continue to close. Problems concerning the lack of diversity and inclusiveness remain, although the dearth of specific regional data makes it difficult to support these claims.

7 Bristol's screen sector is supported by a raft of training schemes and world-leading, regionally based R&D. Bristol City Council continues to be proactive through the work of its Film Office, its UNESCO City of Film activities, and The Bottle Yard Studios (TBYS). TBYS is a major asset, withstanding both the shock of COVID and the downturn; its three additional state-of-the art

Figure 37 *Boarders*
© BBC Studios

sound stages increasing its contribution to the local economy. However, it has lost out on numerous occasions because of the absence of a regional production fund and the financial constraints experienced by Bristol and other local authorities as a result of the severe spending cuts since 2010.

8 The widespread use of AI will affect the UK's film and television industries in a number of critical ways over the coming years. What we have found within Bristol's screen sector is a sense of *creative anticipation* rather than apprehension as a realm of new possibilities opens out. AI offers some efficiencies in workflow operations, but companies recognise that creative control must remain with their experienced human labour force.

9 Although varied, the cross-section of companies reveals some significant absences: in particular, Bristol's tiny scripted sector with, currently, only 6 indigenous companies active in this region. A thriving, variegated drama sub-sector would counteract the region's dependency on inward investment and attract a different cohort of creative talent. Strengthening this sub-sector would help to offset the trend of 'helicoptering' crews into the South-West as there would be a more reliable and continuous need for skilled drama crew in the region. Scripted's relative absence curtails the possibilities of strong regional voices emerging, ones that could represent the region to itself. Developing drama could strengthen local identity and a sense of belonging and also enhance the South-West's national profile.

10 Bristol has benefitted from a long-term government policy of gradual decentralisation that has attempted to 'rebalance' the UK's economy away from its historic concentration in London and the South-East. The BBC's commitment to sourcing more than half of its production spend from the nations and regions benefits BBC Studios in Bristol; Channel 4's shift from a metropolitan to a regionally based company has fashioned an expanding Creative Hub in the city; and WECA is able to make more strategic interventions in the sector through increased funding. Nevertheless, as we emphasised in the two previous reports, Bristol lacks a powerful political voice at a national level. In particular, our interviewees were much exercised by the disparity in provision enjoyed by the devolved nations (Northern Ireland, Scotland and Wales) and the English regions. The proximity of Cardiff that has received far greater levels of investment only serves to sharpen a perception of inequality and a sense that the specific needs and possibilities of the South-West region are being overlooked or undervalued and problematises discussions about an enlarged regional 'supercluster'.

Recommendations

Since the previous Report in 2022, our first recommendation, that there should be an annual Bristol Screen Summit has come to pass. There have been three very successful iterations organised by Lynn Barlow, UWE Bristol's Assistant Vice-Chancellor Creative and Cultural Industries Engagement. This Interim Report will be launched at the fourth, on 11 November 2025.

1 The film and television industries most pressing need is also the most intractable: how to secure stability and long-term sustainability in the sector. The reports we refer to in our overview section on the UK's film and television industries all call for urgent action. Although we found no support amongst Bristol company CEOs for the recommendation of the Culture Media and Sports Committee's report on *British Film and High-End Television* (2025) of a levy on streamers that would be used to fund 'culturally distinct' British productions, we recommend that the Government explore other mechanisms to lessen the UK's dependence on inward investment. We support the Committee's recommendation of a Freelancers' Commissioner 'to advocate at the highest levels' and also its recommendation of a guaranteed basic income that would enable freelancers to ride out production slumps. Retaining and supporting the UK's world-leading creative personnel should be the first priority for this sector, including further measures to increase diversity and inclusivity.

2 We recommend that a detailed study of the region's freelance community be undertaken, a full revision and extension of the 2019 study *Invisible Army: The Role of Freelance Labour in Bristol's Film and Television Industries* undertaken by our colleague Dr Amy Genders. This study would complement our Report's analysis of companies by discussing in detail what issues freelancers face and how they might be addressed. In the absence of regional data, such a study would need to both qualitative and quantitative.

3 In our previous reports, we suggested that a regional production fund be established. In our Findings, we commented that the Bottle Yard Studios has lost out in attracting productions because such funding was not available. It is therefore very pleasing to note that such a fund is now on the horizon as part of WECA's increased provision for the region's film and television industries. We recommend that a regional production fund should have a strong focus on diversity and sustainability as well as nurturing local talent to tell regional stories and use Bristol locations and thus promote indigenous drama companies that currently form less than 1% of the total aggregate turnover. This provision needs to include development funding, often the crucial element for SMEs, and have a promotional element that would enable companies to raise their profile nationally and internationally, which would, in turn, enhance the profile of the South-West region.

4 We recognise Bristol City Council's problems in maintaining The Bottle Yard Studios as a commercial studio space. We have described its importance in detail, both economically and culturally as a key regional asset. As the Council continues to review options for the Studios' governance following its announcement in July 2025 that it will not be sold at the present time, we suggest that other options should be considered carefully rather than an outright sale. If both sites were ever to be sold, we advocate that the Council puts in place stringent safeguards to ensure that its training, outreach and social inclusivity remit continues.

5 Analysing regional sectors continues to be beset by problems of detailed and reliable data, as noted by the CMS Committee's *British Film and High-End Television* (p. 36), among others. For this Report we have, as before, generated our own but also benefitted from data produced by WECA. However, we urge again that national institutions – the BFI, Ofcom, ScreenSkills – and the PSBs (the BBC, ITV, Channel 4 and Channel 5) provide detailed regional data. This provision would help policy makers significantly by showing the diversity of needs across different regions – and between nations and regions – and therefore how provision might best be implemented in local areas to address specific issues, problems and aspirations.

6 In such a fast-moving and technologically dependent sector, the importance of funded R&D to a region's strength is indisputable. Therefore, we look to UK Research and Innovation (UKRI) and other funders to maintain their commitment to *devolved* R&D funding that deploys embedded local networks and knowledge to work effectively with a range of partners. We recommend, in line with the CMS Committee, that the tax exemption enjoyed by science research grants be extended to the cultural and creative sector.

7 In 2022 we recommended the formation of a working group to investigate the possibilities of collaboration between the historically separate screen industries in Bristol and Cardiff. As we discuss in the section on a cross-border 'supercluster' or 'creative corridor' linking the South-West with the Cardiff Capital Region, that preliminary work has been completed. We recommend that further work be undertaken, particularly addressing how the pronounced resentment about the disparity between the funding available in a devolved nation as opposed to what is perceived to be far less generous provision for the English regions might be overcome.

Figure 38 Wallace and Gromit
© Aardman Animations

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Endnotes

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2 For a detailed discussion of how the data was compiled see Appendix 3.

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Code	Description
5911	Motion Picture, Video and Television Programme Production Activities
5912	Motion Picture, Video and Television Programme Post-production Activities
5913	Motion Picture, Video and Television Programme Distribution Activities
6020	Television Programming and Broadcasting Activities

SOC codes is a method used by the Office for National Statistics (ONS) to categorise occupation types based on the type of job, skill and responsibility required. Like Standard Industry Classification (SIC) codes they also require self-reporting and therefore are at risk of inaccuracies from errors on behalf of the businesses' self-selection of incorrect codes. As it is based on a sampling method, it is also not representing accurately national employment trends. For example, this method is unable to track changes amongst freelancers who are short-term, temporary or self-employed. However, the data set does help to highlight general patterns in yearly employment within the screen industry.

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Appendix 1:
Complete company list with postcodes

Total: 198

422 South BS1 5BD
A Productions BS1 5AP
Aardman Animations BS1 6UN; BS32 4RT
Aglow Films BS3 4HL
Amalgam Modelmaking BS5 0EB
Angel Eye Media BS1 2NT
Atomic TV BS1 6SU
Audio Uproar BS8 1PB
BAM Associates BS25 5NT
Beeston Media BS1 3QY
Black Bark Films (not known)
Blak Wave BS8 1HP
Blaze Productions BS9 3HQ
Blue Fire Films BA3 4LJ
Blue Sky Film and Media BA2 4BA
Bone Soup BS8 2LG
Boomsatsuma Creative BS14 0BH
Box7 Studio BS4 5EN
Brian Leith Productions BS6 6JR
Brightworks Media BS7 8SX
Bristol AF Productions (not known)
Bristol Costume Services BS14 0BH
Bristol Drones BS32 8SW
Bristol Productions BS1 5BD
Bristol Television and Film Services (BFTS) BS2 0TH
Briz Kidz Casting BS14 0BH
Buckloop BS7 9AA
Bull and Wolf BS1 6BX
Buzz Media Productions (not known)
Calling the Shots BS1 6UX
Chew Valley Construction BS13 8JU
Cineworks BS14 0BH
Clear As Day Productions BS5 0HE
Clockwise Media BS5 0FJ
Clump Collective BS3 2TN
Cod Steaks BS2 0UG
Conscian Pictures BS9 4PN
Cpr Film Lighting Limited BS91 5TX
Creative Connection Animation Studio BS2 0SZ
Daisy Media BS9 4PN
Destination Film BS49 4GG
Disruptia BS34 7JU
Distortion Studios BS4 3QF
Doghouse Post Production BS8 2AA
DRO Productions (not known)
Drummer TV BS1 1EL
E Murphy Designs BS14 0BH
Early Day Films BS4 3BA
Elastic Pie Films (not known)
Empica BS48 1NA
Esprit Film and Television GL2 7LF
Excitable Media (not known)
Eyelights BS20 8BH
Eyes Up Films BS3 4EA
Fable Studios BS3 4BG
Factory studios BS5 9TQ
Farm Studio BS8 3TP
Figure Nine BS14 0BH
Films@59 BS6 6JR; BS8 2BB; BS14 0HB; BS8 1EJ
Fin (West) Limited BS1 1LT
Five Mile Films BS8 2LG
Flat Earth Scenery & Staging BS5 0TS
Floating Harbour Films BS1 4SP
Freeborne LLP BS8 1LX
Friction BS1 2QD
Future Leap studio space BS8 2AP
Greatbear BS2 8QN
Green Ginger BS1 6UT
Grip Services BS14 0BH
Gritty Talent BS1 6QH
Happy Hour Productions BS1 5BJ
Hello Charlie BS4 3EH
Here Now Films BS7 8AT
HF Video Ltd (not known)
High Angle Ltd BS3 1DP, BS3 3DL
Hillgate Films (not known)
Hollypark Productions Limited BS9 2DR
Homeward Films BS8 2AP
Honey Bee BS9 4PN
Housecat Productions BS3 5BX
Huxley Studios BS2 8RH
Impala Pictures BS1 4JZ
Infocandy Animations UK BS3 1QU
Innov8 Films BS35 1RS
Indefinite Films BS4 2PN
Interval Films BS4 3EH
Island Monkey BA1 1HL
Jelly Television BS1 5HH
Jo Sarsby Management BS1 1TG
John Downer Productions BS8 3PB
JonesMillbank BS4 3QB
Kiss My Pixel BS16 9JB
Knowle West Media Centre BS4 1NL
Korro Films BS1 5HX
Kube Productions BS2 0SZ
Lammo BS37 6LN
Level Films BS8 1HP
Life Media UK BS15 8JF
Little by Little Films GL6 9HA
Lobster Pictures BS16 3RY

Location One BS14 0BH
Location Safety BS14 0BH
Love Productions BS8 1EJ
LT Film BA1 3AN
Lux Aeterna BS1 6LQ
Magnify Content Media Ltd BS8 2LY
Mangostone BS3 2TY
Matchstick Films (not known)
Meaningful Films BA1 3AN
Mendip Media BS3 5QE
Mentor Digital BS2 8NE
Mixed up pixels BS3 4EA
Moonraker VFX BS1 2BD
Mother Goose Films BS5 0FJ
Motion Impossible BS37 5NR
Mtaproductions Ltd BS16 7PN
Mustang Films BA1 7JY
My World. The Sheds BS2 0PZ
New Fruit Productions BS7 8AA
Nine Tree Studios BS43QB
Nineteen Twenty VFX BS4 3AP
Nulight Studios BS6 6JR
Nymbl BS8 1HP
Oak Island Film BS8 4JH
Octopus Films BA1 1HB
Offspring Films BS1 4SB
Olaus Roe BS8 4BQ
Omni Productions BS1 6XG
Once WE Were Warriors Ltd BS5 6BW
One Tribe TV BA1 1HZ
Open Planet Studios BS8 4HG
Orchid Video Transcription BS7 9AD
Overlook FILMS (Bristol) LTD BS7 9HR
Patchway Studios BS34 5DJ
Phoenix Casting BS14 0BH
Picture shop BS8 1AT
Pixilion BS7 8RZ
Plimsoll Productions BS8 2LY
Primary Visual Effects BS1 6BN
Props Ink BS14 0BH
Pulse Digital Studio BS1 6AA
Puppet Place BS1 6UT
Qu Studios BS3 4EA
Quickfire Media BS8 2DB
Real SFX BS14 0BH
Rebel Television & Media BS3 1TF
Reel Soul Movies BA2 5EJ
Relevant Films BS6 5QG
Relish Video Production Limited BS5 6AB, BS5 7PQ
Reuben and. Co BS5 9QL, CM1 2TU
Revelstoke Films BS16 2LL
Reynolds Brothers Films Ltd. BS2 8HT
Rubber Republic BS1 5EH
Rumpus Animation BS1 4RW
Scubaboy BS8 2HR
Set Smith Ltd BS14 0BH
Shadow Industries BS1 5AU
Shorts & Tales BS59PQ
Sid Gentle BS14 0BH
Silverback Films BS1 5DE
Skyhook Media BS5 0ES
Skylark Media Group BS8 2AP
South-WestFilm BS1 6BN
Southwest Chauffer Auto & Driver Services (SWC) BS14 0BH
Spark Films BS21 7TQ
Spike Island Exhibitions Services BS1 6UX
Square Sun Studios LLP BS6 6SF
Strong Film and TV (not known)
Studio Giggle BS4 3EH
Suited and Booted BA1 2NT
Sun and Moon Studios BS4 3EH
Telling Video BS14 0SA
The 345 BS5 0EB
The Bottle Yard Studios BS14 0BH
Troy TV BS8 1HB
True to Nature BS8 1EJ
Tusko Films Ltd BS2 8UH
TV Production Partnership Ltd. BS5 0HE
Under the Wing BS1 3QY
Urban Prism BS6 5HD
V Films (used to be/still is Five Films) BS40 5DL
Visual Impact BS14 0BH
VMI.TV Limited BS5 7XX
Voltage TV BS8 1AT
Walk Tall Media BA14 0DP
Wavelength Studio BS16QH
We Are Audio BS2 8QF
We Are DNA BS4 3EH
We Make films BS8 1EY
White Space Films BA1 2UH
Wilbee Films BS7 8AT
Wild Rice Films BS5 7BG
Wildseed Studios BS1 6QS
Wildstar Films BS8 1SB
Wonky Limited BS8 4UB
Wounded Buffalo BS6 6LE
Woven BS1 6TG
Yatta BS3 1QU
Zeyus Media BA1 2NJ

Appendix 2: Company changes 2022–25

1) Companies that have ceased trading

AB Communications
Academy 7
Airhead Animation
Aqua Vita Films
Aspect Film and Video
AxisVFX
Bailey Balloons
Blacklight Productions
CueBox
Eight Creative Agency
Film Tank
Flyride Films
Free Spirit Films
Freeborne Media
Full Aspect Productions
Funko Animation Studios
Green Umbrella
Group of Seven
Hooded Crow Pictures Ltd.
Hurricane Media UK
Icon Films
Immix
InCamera
John Wright Modelmaking
Lacuna Productions
Lloyd And Rose Buck
Longtail Films
Luminosity Post-production
Magic Films
Mallison Sadler
Moon Ballon Productions
MTFX
Ocula Motion
Off the Fence Productions
The Post House
PYTCH Studios
Radium Audio
RDF Television (West)
Redweather Productions
Remarkable Entertainment
Sapphire Media
Scenewerx Ltd
Studio Cars Bristol
Studio HE
Testimony Films
The Farm Group
The Makeup Kit
TR Film & TB Scaffolding Services
Uplands Television
Vanilla Bear Films
Vistaworx
Wildspace Productions
Zanshin Films
Zubr
(Total: 53)

2) Companies that have started in Bristol or relocated

Atomic TV
Box7 Studio
Bristol AF Productions
Bristol Productions
Buzz Media Productions
Clump Collective
Cpr Film Lighting Limited
Distortion Studios
Excitable Media
Freeborne LLP
Future Leap studio space
Hillgate Films
Homeward Films
LT Film
Matchstick Films
My World. The Sheds
Nine Tree Studios
Once WE Were Warriors Ltd
Open Planet Studios
Patchway Studios
Reynolds Brothers Films Ltd.
Shorts & Tales
Square Sun Studios LLP
Wavelength Studio
(Total: 24)

3) Companies that have moved away from the region

AGB Films
Aurora Media UK
Bells and Two Tones Fire and Rescue
Bexmedia
Copper Tree Media
Dreambase Studios
Evolutions
Flying Camera Company
ForMed Films
Gutsy Animations UK
Hungry Gap Productions
Jooka Film & Video Production
KEO West
Marzano Films
Matchroom
Nomadic Creatives
Outline Productions Ltd
Owl VR
Seadog TV & Film Productions
Shark Biscuit Productions
Shy Guys Studios
Soul Films
The View South
Video Europe
(Total: 24)

Appendix 3: How the Data Calculations Were Made

Out of the 198 companies that were contacted and registered as active within the screen industry in the WECA region, 44 responded contributing their data to the *Go West! 2.5* Report. The data for the remainder was either based on conversations with company representatives (18 companies), or estimated using regional growth rates, Company House data and online sources (136 companies). Co-Pilot was then used to estimate the missing companies' data.

The data submitted for *Go West! 2* was used to provide a 2021 baseline for the companies which were included. This was combined with the data submitted for *Go West! 2.5*, which was used to help observe growth patterns within the region and in each of the sub-sectors. Co-Pilot was then asked to incorporate and cross-examine these data sources to help predict growth rates for each of the sub-sectors:

- Account filings on the Company House website,
- Particular companies' website, social media, production credits
- Data from the Office for National Statistics and the Nomis website, including the information gathered from reviewing SIC and SOC codes
- Company and screen sector news articles
- Commissioning data and annual reports from BBC, Channel 4 and other broadcasters
- Reports on national growth rate for the screen sector and subsectors. For example:
    - Creative UK's *Cultural and Creative Industries Stats – Q1 2025 26*
    - House of Lords *In Focus Creative industries: Growth, jobs and productivity*
    - PwC UK *Entertainment and Media Outlook* (2023–2025)
    - Ofcom *Media Nations UK* (2024) and *Annual Report* (2023)
    - BFI *Industry Production Trends* reports (2023, 2024)
    - ScreenSkills *Annual Workforce Review* (2024)

The list of companies was broken down according to their sub-sectors and their registered classification on the Company House website, whether they were a micro, small, medium or large organisations. This enabled specific regional patterns of growth to be estimated dependent on the size of the company and sub-sector.

Incorporating the size classifications of the companies provided baselines for their staffing numbers and their annual turnover. However, this does not account for companies whose financial amount on their balance sheet is the determining factor of their size classification. Nor does it differentiate companies which may have moved recently or changed their size classification since their most recent account filing, which may be the case due to the impact of COVID-19 or the commissioning slowdown on the screen industry sector in the reporting period.

Co-Pilot was then asked to estimate companies' data for the following categories:

1. Full Time Equivalent Staff within the WECA region
2. Annual Company Turnover, from company offices located in the WECA region
3. Economic Contribution to the screen sector in the WECA region

By specifying the WECA region, companies that had additional offices elsewhere had their estimates adjusted. This was according to information available on their websites and social media about their productions produced or services offered in the WECA region.

The results generated were then checked by the researcher, who analysed Company House account filings and the companies' online presence for 50–75% of the estimated companies. These figures were checked alongside the data given by similar sized companies in their sub-sector. The sources of information used by CoPilot were also checked to ensure they were legitimate. For the cases where the estimates seemed inaccurate or from illegitimate sources, the researcher resubmitted the enquiry with links to accurate data sources.

Co-Pilot was asked to test for sensitivities for each of the groupings. Sensitivity criteria that may have affected the confidence in the estimations included:

- Data availability – e.g. Where account filings were available, they were often from 2023 as many companies had not submitted their 2024 paperwork
- Data completeness – e.g. Micro and small companies not required to submit full accounting details
- Portfolio clarity – e.g. Up-to-date information provided online about the services a company offers
- Estimation confidence – e.g. The ability to observe trends from the number of other companies which submitted data in their sub-sector groupings
- Inactive or dormant status – e.g. When information about a company's commissions or active projects in the past year could not be gathered

Any companies with lower confidence levels were checked by the researcher. Where possible, additional resources were found. However, in many cases, because of the lack of available data, estimations were based upon the other similar companies in their sub-sector.

This method may hide smaller contextual patterns within each of the sub-sectors and may provide a conservative estimation of sub-sectors with higher levels of growth. However, this may account for companies that appear to be functioning according to their online presence yet are in effect dormant. Therefore, data abstracted from this research should be considered indicative of the regional screen industry's health and status, which suggests a slow growth but hides many of the struggles experienced by smaller companies and freelancers since the release of the *Go West! 2* Report in 2022.

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