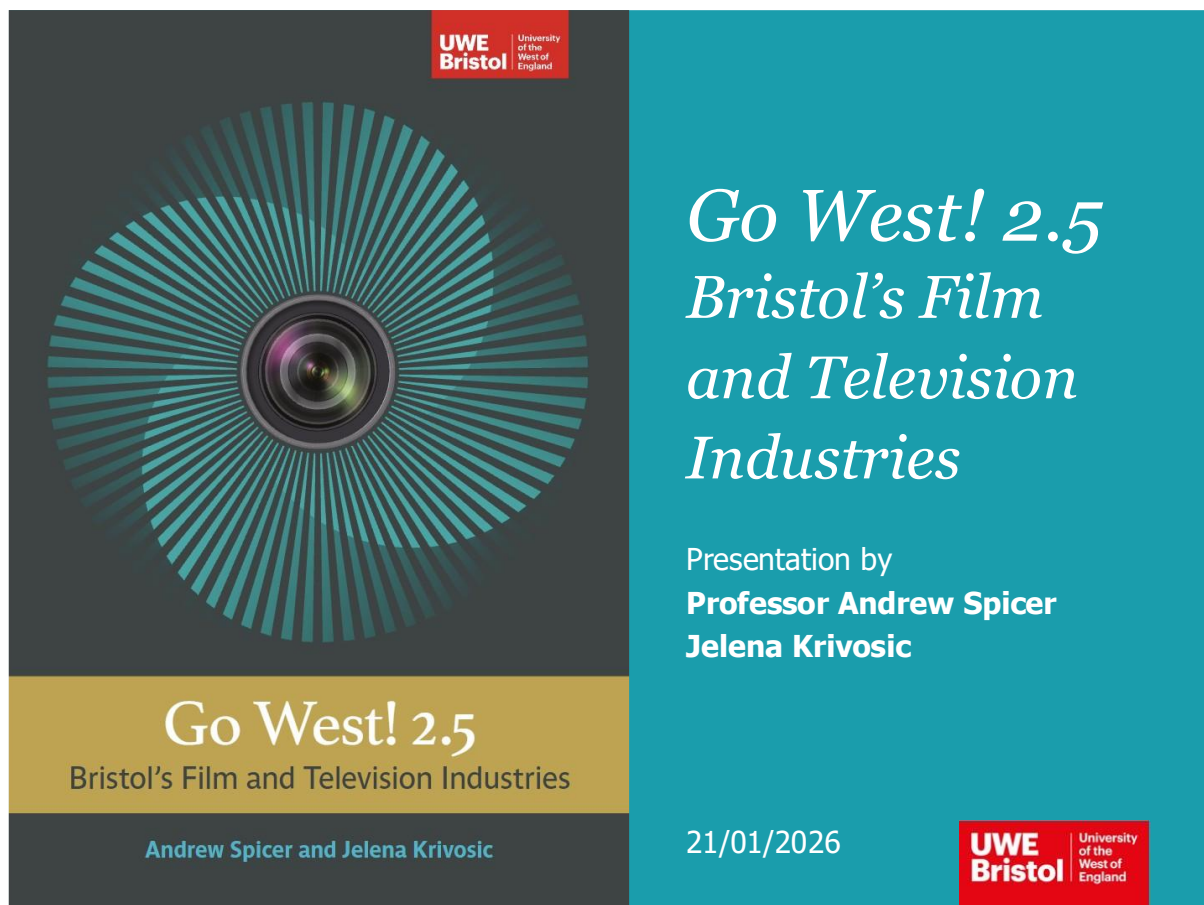


## Screen Research Presentation 21/01/2026



### Title Slide

Thanks to Charlotte Crofts and Mark Bould, the co-convenors of the Screen Research Group for enabling us to present at what we hope won't seem inordinate length. The aim is to talk for about 50-55 minutes allowing about 35-40 minutes for discussion.

*Go West! 2.5: Bristol's Film and Television Industries* was originally launched at the Bristol Screen Summit on 11 November 2024 when we only had 10 minutes, which was time for just the main data/findings, given to an audience of Bristol Screen Industry folk. Tonight is the opportunity to be more discursive, contextualising the report and, we hope, initiating discussion of its content and the implications of our approach, its limitations and what needs to change going forward.

*Go West! 2.5* is the third iteration of this Report. The first two were co-authored with Steve Presence then at UWE in 2017 & 2022. It's called 2.5 because an *update* rather than a full revision. The intention for *Go West!3*, is for Steve, now at University of Bristol and me to recombine when the two Bristol universities can join forces but also to create a small team and include analysis of the games industry and freelancers. But we also need to reconceptualise, as I'll come back to later.

I also want to say that although I'm speaking to most of the slides, it's because I'm more familiar with the contextual material. However, *Go West! 2.5* was very much a *joint*

production and this is a public opportunity for me to thank Jelena for being such an excellent co-author and spending far more time on the report than she was allocated.

## Slide 2: Overview of the presentation

### Overview

- ☐ Broad Research Context
- ☐ London's Dominance of UK Screen Industries
- ☐ Geography of UK media
- ☐ Bristol as a Regional Centre
- ☐ Bristol as an 'Incremental' Screen Hub
- ☐ Report Scope
- ☐ National Picture
- ☐ Data and Report Findings
- ☐ Recommendations
- ☐ Western Gateway
- ☐ Approaches to Place-Based Studies
- ☐ Researcher Positionality
- ☐ Data Compilation
- ☐ Problems and Issues Going Forward



## Slide 3 London-Centricity

# National Context

## UK's Screen Industries London-Centricity

The population of the Greater Metropolitan area of London is 15.1 million, which is 10.4% of the UK's population (69 million)

- 70% of film companies located in London and South-East;
- 85% of turnover generated by companies in these regions.
- 61% of distribution companies located in London, accounting for 98% of turnover [Source: *BFI Statistical Yearbook*]
- 62,000 people working in film and video production; 57% based in London and South-East (freelancers: 49%) [BFI, *Employment in the Film and TV Industry*]
- London is the UK's only 'world city' – nodes of political, economic and financial power, acting as command and control centres in an emerging neoliberal global politics of place (Saskia Sassen, *Cities in a World Economy*, 2019).



AS

It's always impossible to gauge familiarity in these events so forgive me if some of what I have to say is very familiar to many of us but perhaps not to everyone. I wanted to place Bristol in a UK context that has always been dominated, politically and culturally, by London. In media terms, 'London' extends to the area within the M25 orbital motorway; economically and strategically it often encompasses the whole of South-East England. London's dominance of the film and television industries is out of all proportion to its demographic size. London is the UK's only 'world city', which, to borrow Saskia Sassen's formulation, act as a 'command and control' centres. London is almost on a par with New York and Los Angeles as a node of neoliberal global capitalism. That global status increases its dominance of the UK's wider economy and its media industries.

## Slide 4 UK Media Geography

# Geography of UK Media (Outside London)

Dominance of London and the South-East produces 'geographies of discontent' (Philip McCann, 'Perceptions of Regional Inequalities and the Geography of Discontent', *UK 2070 Commission*, 2019)

## Outside London/South-East = Nations and Regions

- **Nations:** Northern Ireland, Scotland and Wales
- **Regions** are the English Regions, not including the South-East
- **Regions have 78% of UK population but 35% of total workforce employed by UK producers**



AS

London's dominance has profound implications for the UK's overall economy, culture and spatial relationships. Philip McCann has written extensively about this, including his magisterial *The UK Regional-National Economic Problem: Geography, Globalisation and Governance*, in 2016; I've included a reference here to a shorter version. McCann uses the resonant term 'geographies of discontent', to express a shared resentment about London that extends across both the UK's devolved nations (Northern Ireland, Scotland and Wales) and the English regions, which exclude the South-East encompassed by London. However, there are several divisions or perhaps 'degrees' of discontent:

- The first is the fault line between Nations and Regions. Although the devolved nations do not have independent control over their media – one of the UK Parliament's 'reserved powers' – they do have the ability to invest significantly more money than the English regions. They also have far greater political power. Hence there is a major BBC presence in Belfast in Northern Ireland, although its population would not justify it.
- The other major centres of screen production identified on the map create a very uneven media geography that can only be explained historically and not simply through the effects of 'clustering', the synergies and efficiencies created by concentrating labour and resources in particular localities, usually cities. Bristol benefits from this clustering. The concomitant is the exclusion of many other major cities. The smaller television industries that used to exist in Southampton and Plymouth for instance, have closed because of these economic pressures to cluster. Mark McKenna's excellent *Levelling Up the Screen Industries? Film and Television*



*Production as Regenerative Strategy in Places Left Behind* (2025) details four of these cities' struggle to attract investment.

## Slide 5: Bristol

# Bristol



Bristol is an attractive city of around 500,000 people, rated as a highly desirable place to live in various surveys, including the influential ones by the *Sunday Times*. Its city centre is walkable and has many cultural and leisure facilities that are valued by media and other professionals. It's also within easy reach of beautiful countryside and under two hours from London. The photograph also shows how the River Avon penetrates into the heart of the city; Bristol originally grew as a port in which ships could unload right in the city centre. The next slide elaborates on these points and makes the fundamental point that Bristol's screen industries, *or those of any other city*, cannot be explained in terms of simple economics, they are the result of *much longer term political and historical processes* that affect profoundly why they are like they are. This is where the emphasis of our research differs fundamentally from what I would call the econometric focus of the papers and articles that emanate from the Creative Industries Policy and Evidence Centre. What we attempt, in all the iterations of *Go West!*, is not simply to estimate size and other quantifiable indices but to explain *causality*.

## Slide 6: Bristol as a Regional Centre

# Bristol as a Regional Centre

- Historical Context: Atlantic-facing port; principal city of the South-West Region
- Unlike the great northern cities, Bristol industrialised in the 18<sup>th</sup> C. wealth built on the slave trade 'triangle' (UK-Africa-Caribbean)
- Never dominated by a single industry
- Has a tradition of entrepreneurialism (merchant venturers)
- Tradition of free-thinking, contrarian radicalism
- In contrast to the devolved nations the English regions are much weaker entities, generally regarded as administrative units rather than forces for civic, social or political change, their boundaries constantly drawn and redrawn. They exist in a 'state of constant flux' (Hardill et al. *The Rise of the English Regions?* 2006: 3), which has undermined their credibility as objects of affiliation or as instruments of effective transformation.



AS

There are several core elements to Bristol's identity as a city, in modern terms its 'brand', or what Simon Anholt calls its 'competitive identity' (Anholt: *Competitive Identity: The New Brand Management for Nations, Cities and Regions*, 2007).

The first is geographical: Bristol is an Atlantic-facing port whose wealth derived from the slave trade, the abhorrent 'trade triangle' in which slaves were taken forcibly from Africa to work on the Caribbean plantations and those ships returned to Bristol laden with sugar, tobacco and other goods.

The second is historical: that wealth was accumulated in the 17<sup>th</sup> & 18<sup>th</sup> centuries. This makes Bristol very different from the UK's great northern cities such as Leeds or Manchester, or Glasgow in Scotland, which became wealthy in the 19<sup>th</sup> century through industrialised manufacturing. Consequently, Bristol did not suffer from a corresponding decline in the late twentieth century as the result of deindustrialisation. However, that also meant that there was not the same incentive for large-scale redevelopment in Bristol, always considered prosperous, not in need of external grants.

The third is cultural: Bristol's tradition of entrepreneurialism, innovation and contrarian free-thinking which continues through to the present. This is Bristol's preferred imaginary, and this self-image has an unquantifiable but powerful effect on its residents and on media professionals. Bristol is considered a city which is hospitable to experimentation, where risk-taking is encouraged.

The fourth is political. As the principal town of an English region, the South-West, Bristol has far less political clout than the capitals or major cities of the devolved nations: Belfast

(Northern Ireland), Glasgow (Scotland), and its near-neighbour Cardiff, the Welsh capital, which have attracted far greater external infrastructural investment. The South-West is a large, diverse and fragmented region, lacking a strong cultural identity *as a region*. This typifies the historic problems of the English Regions, which, in comparison with the devolved nations are much weaker entities, generally regarded as administrative units rather than forces for civic, social or political change, their boundaries constantly drawn and redrawn. They exist in a 'state of constant flux' (Hardill et al. *The Rise of the English Regions?* 2006: 3), which has undermined their credibility as objects of affiliation or as instruments of effective transformation.

*What regions are and how they operate is what is really at the heart of this research enquiry.*

## Slide 7: Incremental

# Bristol An 'Incremental' Screen Hub

UK's **second** largest cluster of film and TV after London. Two global 'brands':

- **BBC's Natural History Unit** (1957-)
  - Bristol has become the 'Green Hollywood'
- **Aardman Animations** (1976-)
  - Both have generated sub-clusters of related firms
- **ITV Franchises:** TWW (1956-67); HTV (1967-2000)
- **Indies:** 198 companies across 7 sub-clusters
- Bristol's core strength is its skilled talent pool

### A Mature Infrastructure

- Bristol Film Office (2003)
- The Bottle Yard Studios (2010)
  - Council Owned; 8 studios increased to 11 in 2022
- UNESCO City of Film (2017)
- Channel 4 Creative Hub (2019)



In a neo-liberal economy, cities, even within the same country, compete rather than co-operate. Through its number and variety of independent media companies (nearly 200), Bristol likes to think of itself as the UK's second largest media cluster after London. However, that status is also claimed by Glasgow, Manchester and, more recently, by Cardiff.

In contrast to Cardiff, whose strengths as a production hub has been 'engineered' by external funding (the UK and Welsh governments and the BBC), Bristol's strength has been *incremental*, a gradual accumulation of skills and talent over time. This is typified by its two

global brands: the BBC's Natural History Unit (NHU) and Aardman Animations. The NHU grew gradually post-Second World War, becoming an international powerhouse through producing 'landmark' programmes from *Life on Earth* (1979) through to the present *Planet Earth III* (2023). Aardman expanded gradually from 1976, originally through BBC commissions, evolving iconic characters such as Wallace & Gromit and Shaun the Sheep. Both have generated sub-clusters, the dominant being Natural History hence Bristol's soubriquet as the 'Green Hollywood', which, Jelena tells me, has been cancelled by Disney (and others)!

Bristol also benefitted from a strong ITV regional franchise, whose significant legacy is the subject of my current research.

These three companies generated a powerful clustering effect. Most of the 198 independent companies are SMEs, but some, notably Plimsoll Productions – taken over by ITV Studios in June 2022 – are internationally significant.

In the process of its incremental growth, Bristol has generated what we call a 'mature' infrastructure that supports these companies: the Council owned and run Bristol Film Office (2003) and The Bottle Yard Studios, augmented by being awarded UNESCO City of Film in 2017 giving international recognition; and gaining further national status in becoming one of Channel 4's two Creative Hubs in 2019 (the other is in Glasgow) as part of that public service broadcaster's move out of London. Of course, in a neoliberal environment some 30 cities competed to be a C4 hub, so this was a major coup for Bristol.

Bristol is principally a *television city* not a film city. Only Aardman and the tiny drama companies produce feature films. However, as the two industries have started to converge and talent moves from feature films to High-End Television (HETV) – which has similar production values – and back, this neat classification may change. But the nature of the sector is undergoing a more fundamental change, a key issue to which we will return.

## **Slide 8: TWO BBCs**



## The Two BBCs: Public Service & Studios



AS

As a side issue, but one I can't resist, Bristol exemplifies the 'two BBCs'. There is the public service broadcaster (PSB), still occupying its original 1934 site, Broadcasting House in Clifton, three-quarters of which is now not in use, the peeling Doric columns symbolising a fading, old world gentility. By contrast, from 2022, BBC Studios occupies Bridgewater House, a state-of-the-art building in the trendy Finzel's Reach 'quarter', symbolising a slick, progressive, but also eco-friendly modernity. The two sites have separate staff who have no connection to each other, are on different pay scales and funded differently: the PSB by the licence fee, BBC Studios commercially – by selling and distributing its programmes nationally and internationally and producing for other companies as well as the BBC. In addition, the PSB is *solely regional*: producing local television and radio news programmes; BBC Studios – of which the NHU is a major component – is *not regional*; Bristol is simply one of Studio's ten UK production sites. It has *no specific connection to Bristol as a place* other than its skills base.

### Slide 9: The Bottle Yard Studios



The Bottle Yard Studios (TBYS) is one of only two UK production complexes that are council-owned. It was created in 2010 when Bristol City Council was persuaded to buy an old bottling plant in an area of South Bristol (Hartcliffe) that was a site for regeneration. It has been highly successful, expanding, through regional (WECA) investment, to a second site with three additional state-of-the-art studios that have won awards. However, most productions that use TBYS are inward investment, made by companies *outside the region* making use of facilities that cost about one-third less than a London equivalent. The picture bottom left is from *Rivals* (October 2024) made by an American studio, Disney+, a period drama for the international market based on one of Jilly Cooper's 'bonkbuster' novels. I'm happy to say I've never seen this series – a state in which I intend to remain – but it was highly successful and has been re-commissioned. However, although bringing money into the region during production, *the major profits go abroad*. Although a huge asset, TBYS suffers from two disadvantages: a) it requires significant investment to keep pace with change; b) it suffers from competitors such as Liverpool that can offer a regional production fund incentive. Its future is uncertain. TBYS was put up for sale by the Council, but the sale was then withdrawn because a suitable buyer, one which would maintain TBYS's outreach work in a deprived area of Bristol and its various training schemes, could not be found.

## Slide 10: Scope of the Report

# Context/Scope of the Report

**Longitudinal Study** *Go West!* (2017 + 2022);  
*GW! 2.5* (2025) **Update not full revision**

- ✓ Fully updated statistical data:
- ✓ Number of companies in each of seven sub-sectors: Animation; Branded Content; Drama; Facilities Factual; Natural History; and PostProduction
- ✓ Distribution of turnover per sub-sector and turnover bands
- ✓ Full-time employees in each sub-sector
- ✓ WECA Region

**Review of principal changes 2022-25:** Nationally/Internationally/Locally



JK

*Go West!* is a longitudinal study that began with the first report, *Go West! Bristol's Film and Television Industries*, released in 2017. It was created with the intention to be repeated every five years to provide a continuous review of the changes in Bristol's screen sector. This study was then repeated in full for the second report, *Go West! 2*, which provided a comparison point for the first report. Released in 2022, during the very early stages of the COVID-19 pandemic, the report was able to capture the state of Bristol's screen industries during the start of the screen sector's "boom" that occurred during lockdown.

*Go West! 2.5* was designed as a review, rather than a full update of *Go West! 2*. It aimed to observe the changes in Bristol's screen industries over the three-year period from 2022 to 2025. It captured the impact of the national Film and Television industry crisis and resultant commissioning slow down on the local region. It therefore acts as a mid-way review, or check point, to evaluate the effects of the ongoing and rapid changes caused by the industry downturn, rather than waiting the normal five-year period before the next full review, *Go West! 3*. *Go West! 2.5* will be a comparison point for the industry in 2022 and in the future, 2027/8 – for *Go West! 3*.

The scope of the *Go West! 2.5* report is as follows:

- Fully updated statistics from *Go West! 2*

- Repeated use of the sub sector categories as per previous reports: Animation, Branded Content, Drama, Facilities, Factual, Natural History and Post-Production.
- Review of annual turnover generated by each subsector,
- Comparison of turnover bands, allowing for the comparison earnings from different sized companies across the region
- Estimated number of full-time equivalent staff, to account for freelancers that aren't official staff and harder to quantify, as often research into the industry or data sets regarding the regional sectors staffing doesn't accurately capture freelance numbers, for example data from the UK Government's from the Office for National Statistics and its Official Labour Market Statistics service, Nomis.
- Companies must be located in or have an operating office in the WECA region.

## Slide 11: WECA/WEMCA

### WECA Map



JK

The West of England Combined Authority, WECA, sometimes referred to as WEMCA as the West of England Mayoral Combined Authority, is a combined authority within the West of England area. It consists of Bristol, South Gloucestershire, Bath, Northeast Somerset and, though still under consultation regarding their inclusion within WECA, the region of North



Somerset. As an organisation, it has responsibility for the region's policies regarding transport, employment and skills, urban planning and environment.

WECA has a new fund that will be investing in the region's cultural and creative sector over the next few years through their Culture West programme. This may provide an opportunity to support creative professionals and infrastructure for the creative cultural sector in the region, potentially influencing the shape of the sector prior to its review in *Go West! 3*.

## Slide 12: National Picture

# National Picture

Three major reports identify a crisis in the screen sector:

- Culture, Media and Sport Committee (2025) *British Film and High-End Television* HC328.
- Ofcom (2025) *Transmission Critical: the Future of Public Service Media*
- Oliver and Ohlbaum (2024) *Changing UK Content Production: What Could this Mean for the Health of the Production Sector?* (for Pact)

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*

(Pact Report, our emphases)



AS

It's unusual for a government committee, the communications regulator Ofcom, and the producers' union, Pact, to all produce three such detailed and wide-ranging reports so close together. This was a very telling indication of what each perceived as a serious crisis in the UK's film and television industries. The extended quotation from the Pact report succinctly and perceptively describes the core issues. The Pact report argues for the *interdependency* of the screen system, which relies on a mixed economy of production from various types of businesses and an ecosystem that requires vigilance to be sustained. All three reports identify the dangers of the UK becoming over-dependent on foreign investment which would jeopardise this *cycle of creative renewal*.

## Slide 13: National Picture 2

## National Picture 2

The screen industries cyclical but period 2022-25 extreme fluctuation:

- Post-pandemic Boom-2021/22: record level of production spend
- Followed by Bust (2022/23-): production spend fell by 36%; HETV spend dropped from £5.1bn (2022) to £3.1 bn (2023);
- Caused by: 1) Hollywood strikes; 2) streamers' circumspection; 3) advertising downturn; 4) PSB cuts and redundancies; 5) geopolitical uncertainties
- Severely disrupted the 'cycle of renewal'; companies increasingly risk averse
- 'Fewer/bigger/better' mantra: favours established talent & firms ; 'squeezed middle' of programming + small/medium companies

Bectu (2024) *Half of UK screen industry workers remain out of work*

- 68% freelancers currently employed; 88% concerned about financial security; 75% struggling with mental wellbeing

Underpinned by sector changes: viewing habits; linear-digital; rebalancing (streamers/PSBs)

- 'a period of flux and uncertainty' that will continue for several years; + 'something more fundamental and long term'

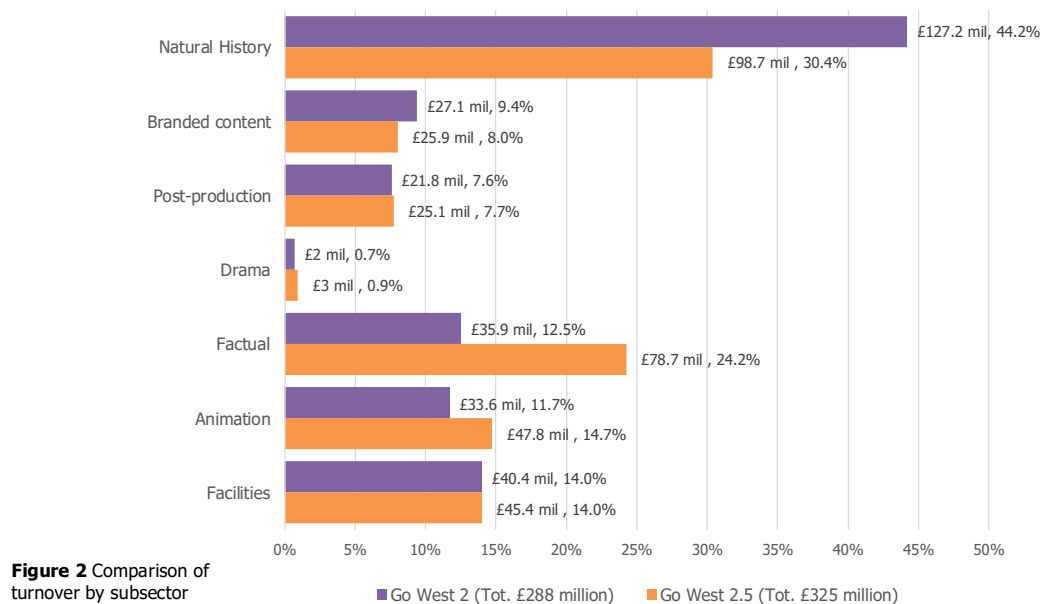


AS

In this slide we have summarised the interlocking set of factors that have created this crisis. Although the film and television industries are cyclical by nature, the degree of fluctuation during the reporting period, 2022-25, is unprecedented, at least in the recent past. The consequences for small companies and freelancers have been particularly severe. It has to be said that these general geopolitical uncertainties are exacerbated every time US President Trump opens his mouth! Which is another reason not to become too dependent on foreign (i.e. American) investment. The report by the broadcasting trade union, Bectu, is particularly chilling.

Although *Go West! 2.5* focuses on these 'three turbulent years' (2022-25), it identifies that the recovery in 2026 and onwards will be slow because the 'flux and uncertainty' continue as the industry struggles to find stability, the 'new normal'. However, there are also more deep-seated and longer-term issues. Fundamentally these have to do with the shift, in television, from linear to digital audience consumption, from fixed broadcasting schedules to online, on-demand, viewing habits. Increasingly, the dominance enjoyed by the UK's PSBs is being challenged by 'online natives', the subscription video on demand (SVODs) or streaming platforms, which continue to expand their subscriber bases and which have the resources to commission programmes – in terms of volume and production values – that far exceed those of the PSBs. This shift to a digital world is leading to a rebalancing of the UK's screen sector and a pronounced generational split: older audience members are wedded to linear viewing and have grown up with PSB provision. Younger viewers are primarily, sometimes exclusively, online consumers and have no such loyalties.

## Turnover per sub-sector



JK

The following slides analyse data from the *Go West! 2* and *Go West! 2.5* report and highlight comparisons that were not included in the reports themselves. This slide showcases a comparison of the findings from both reports, thus comparing data of Bristol's screen sector in 2022 and 2025. This graph helps demonstrate the change during this time in the region's turnover, as broken down per sub-sector, thus providing a different perspective to the one provided in the reports.

The data from *Go West! 2* is labelled in purple and the recent report *Go West! 2.5* is in orange. Comparison of the total turnover between *Go West! 2* with a total of £288 million and *Go West! 2.5* showing a total of £325 million, draw attention to the growth in the sector overall in the past three years.

The graph shows that most of the sub-sectors' turnovers have been stable during this time, which does not indicate much growth individually. However, considering *Go West! 2* was collected during a national industry-wide boom and we are now in a slump, this stability suggests resilience across most of the regional sub-sectors, which is a good sign for future recovery from the recent fluctuations.

Natural History, a historic pillar of the regional screen industry, has shrunk rather obviously. The graph documents the difference between the post-covid boom the sub-sector experienced and its diminished status in 2025. This boom for Natural History was unique, unlike anything

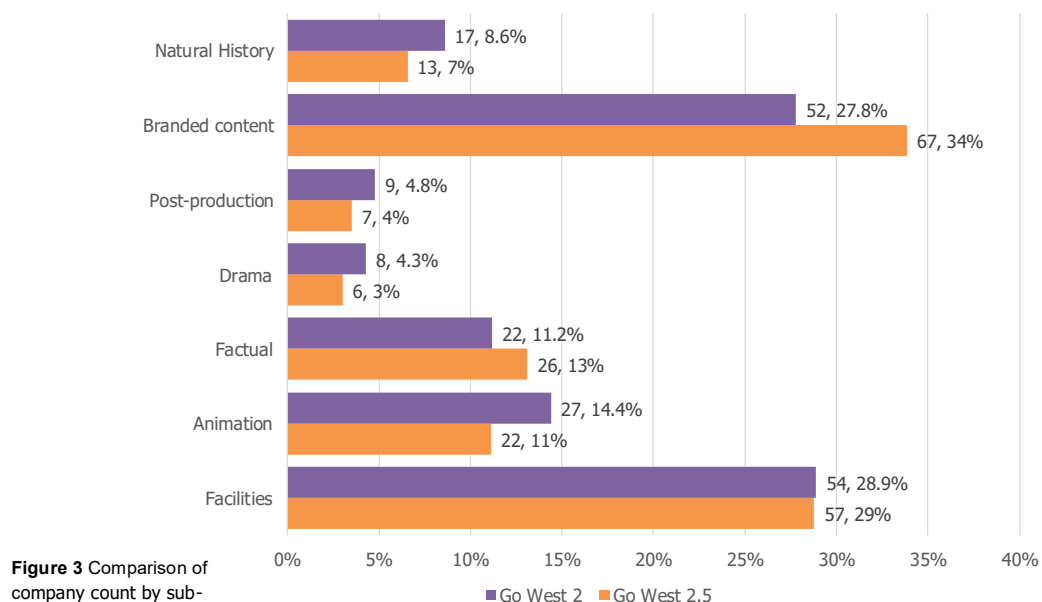
the other sub-sectors experienced. Also, unlike the other sub-sectors, the turnover during the boom in 2022 has not been sustained. Natural History's continuous struggle and lack of recovery suggest it is particularly vulnerable to a changing media landscape and wider industry changes. Indeed, it could still be in the slump due to its long production schedules, typically between 2-4 years, delaying the realisation of the shocks. This may result in the sub-sector reaching a similar level of stability to the other sub-sectors in a few years' time, if there are no further changes or threats in the media industry in the meantime.

Factual is the only sub-sector to show considerable growth; Animation grew but not to the same extent. The reason for the Factual sector's growth may be because as more Natural History companies try to diversify their sources of income, they are using their specialised skillset to enter other sectors.

If these trends indicated in this graph continue, it suggests that the region might become less specialised, with its Natural History sector shrinking. Instead, it may become more diverse with a wider spread of relatively stable sub-sectors, rather than one or two dominant sub-sectors. This could make the region's screen industries more resilient to future change.

## Slide 15

# Number of companies



Similar to the graph on the previous slide, this slide compares the number of companies per sub-sector from *Go West! 2* in purple, to the recent report *Go West! 2.5* shown in orange. The



number of companies are mostly stable across the board, with the minor changes suggesting a small turnover in the number of companies within the sub-sectors. Considered within the wider context of the screen sector's recent boom and bust, this is a positive sign as it shows that the region can sustain a similar number of companies despite the national challenges the industry is facing.

The Natural History sub-sector has shrunk slightly. Combined with the observations from the last graph, it suggests that though companies are still open, there is less work out there as the few that are open are making a lot less money.

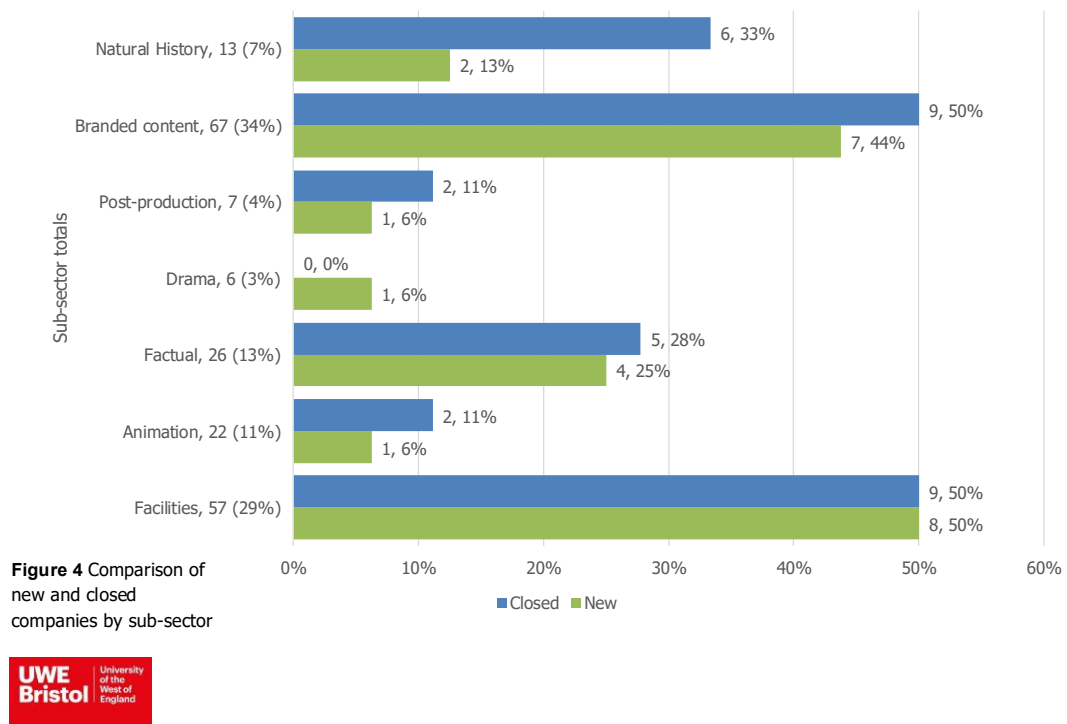
A slight shrinking in the Animation sub-sector is evident. This is despite the growth in income visible on the previous slide, which suggests the annual turnover is from fewer larger companies. It indicates that smaller firms are potentially disappearing as they could not survive the changes in the screen sector.

Noticeably, there is a high level in change in branded content companies. This may show a general shift across sub-sectors as more freelancers set up their own companies due to a general lack of work and high unemployment. The move to set up new companies could highlight a trend, as more freelancers try to diversify their revenue streams to enable them to remain in the sector and survive financially through the slump.

The growth in the Facilities sub-sector may also be indicative of the sector's boom. The commissioning increase and the impact of productions that were placed on hold during the lockdowns being permitted to film again, resulted in a rapidly rising demand for filmmaking facilities. The telling factor for this sub-sector will be in the comparison of these datasets with that of the future *Go West! 3* report. If the number of facilities remains constant it will show that the growth in demand in the sector has remained constant. However, if it reduces, following the trend of the screen sector's slump, the next few years may see the moving or closure of companies that supply the region's facilities, as supply outstrips demand.

## **Slide 16**

# New and closed companies



Unlike the previous slide, this graph only provides data from *Go West! 2.5*. It compares the number of companies per sub-sector that have closed, in blue, with those that have opened, in green. It indicates the rate of change in each of the sub-sectors that is clearest in Natural History, which has seen most closures and least new companies opening in the past three years. This trend suggests that the sub-sector is shrinking as there is not a regular turnover in companies, and only a few new companies are replacing those that close. It reflects the data in the first graph, showing the total numbers of companies, inferring that Natural History's historic prominence in the WECA region is weakening.

Most other sectors have stayed relatively constant with little turnover in the few years. However, there was a high turnover rate in Branded Content and Facilities. Although both show a relatively constant flow of new and closing companies, which demonstrate little fluctuation in total numbers, it suggests quite a lot of change in each sub-sector's companies over a short period. This may suggest that companies have been struggling to retain a constant workload during this period of industry slowdown.

## Slide 17: Findings

# Report Findings

## Findings

- 53 Bristol companies ceased trading; Nat Hist down from 17 cos. & 44.2% of Bristol's turnover in 2022 to 13 cos & 30% in 2025
- Widespread issues of employment and wellbeing in sector
- Less commissions, narrower range; more risk-averse; threat to renewal
- **Mature infrastructure mitigation:**
  - Bristol Film Office; UNESCO City of Film; Bottle Yard Studios;
  - West of England Combined Mayoral Authority (regional fund)
  - training providers; regional R&D (universities/MyWorld)
- **Other Issues**
  - AI – creative anticipation and excitement rather than apprehension
  - Continuing imbalance in funding between devolved nations & English regions



AS

As Jelena has shown, a significant number of companies have ceased trading, which jeopardises this ‘cycle of renewal’. The NHU/natural history production has been particularly affected. The principal reason, which again demonstrates the perils of over-reliance on external sources of finance, was the decision, by several streamers, that wildlife programmes were a risk. In what were became harsher conditions once the covid boom in subscriber numbers has burst, the streamers commissioned less programmes and refocused on drama and live sport. For example, Netflix cancelled series 3 of the very successful *Our Planet* series (2019-23) by Silverback Films, not because of the quality of what was being proposed but simply because they were no longer funding natural history programmes. Bristol’s historic dependency on natural history has meant that these cutbacks have had serious consequences throughout the local ecology.

However, what helped Bristol weather the ‘bust’ better than several other UK production centres was its mature infrastructural support, the council’s services helping to co-ordinate post-pandemic recovery. The ongoing training and R&D provision have also contributed significantly to sustaining the ecosystem and have softened or mitigated the worst effects of the production downturn.

The impact of AI is one of the industry’s most pressing challenges and our findings perhaps reflect who we talked to, which was, in the main, the heads of major companies such as Plimsoll or Aardman. Those CEOs were also acutely conscious of the lack of external

funding and looked enviously across the Severn at the help available from the Welsh Government for Cardiff producers. I'll return to this point.

## Slide 18 Recommendations

# Recommendations

- 1) Freelancers' Commissioner + guaranteed basic income + *need for a major research study*
- 2) Regional Production Fund (increase indigenous drama)
- 3) Retain control of The Bottle Yard Studios + TBYS
- 4) Provision of detailed data on the various English regions
- 5) Devolved R&D spending to support the English regions
- 6) Further work on the possibilities of a 'supercluster' with Cardiff (the 'Western Gateway')



AS

These recommendations are a mixture of ones made in 2017 and 2022 and some that were new for 2025.

In 2019 our colleague Amy Genders wrote an excellent study *An Invisible Army: The Role of Freelance Labour in Bristol's Film and Television Industries*. Without committing her time without consultation (!), we think a follow-up study would be extremely helpful because the *Go West!* 2022 and 2025 reports have been so heavily *company focused*. One of the Culture Media and Sport Committee's recommendations was for a Freelance Commissioner to be appointed. We fully support that proposal and also its recommendation that freelancers, as in France, should be guaranteed a minimum level of support irrespective of employment circumstances.

As Jelena pointed out, Bristol's drama sector is tiny, and we completely endorse the recent decision by WECA to initiate a regional production fund that would encourage local production. This would go some way to addressing the need for indigenous companies to use TBYS – and thereby reduce the proportion of inward investment – and also because Bristol rarely 'plays itself': i.e. there are very few productions – the exception was Stephen Merchant's *Outlaws* – that reflect the city's varied geography and its social and cultural



diversity. We also believe that it's imperative for the Council to retain control of TBYS in order that it continues to fulfil its inclusive social remit and not become simply a low-cost production facility.

We have said in each iteration of *Go West!* that the provision of detailed regional statistics should be a *priority* for national organisations, principally the British Film Institute and Ofcom. Everybody agrees not only that the regions are very different from the nations, but that *they differ profoundly from each other* and therefore have contrasting needs and priorities. This brings us back to the vexed question of these relationships.

## Slide 19: Western Gateway

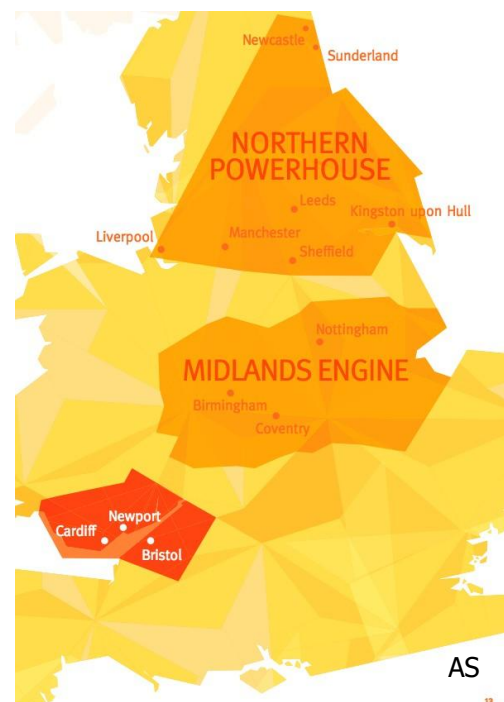
# Western Gateway

### Regional Supercluster/Creative Corridor

"In the past the Bristol City Region has largely tended to look east to London and the South-East instead of also forging closer links with its close neighbours less than an hour's drive away. Bristol and its wider City Region and South Wales will have more in common than ever before, and this is a great opportunity for the business community to make the most of those shared interests.

If we want to compete, not just on the national stage but also on the international stage, I believe we need to take full advantage of this once-in-a-generation opportunity."

(James Durie, chief executive of Bristol's Chamber of Commerce; December, 2018)



This comment by James Durie was made shortly after the tolls on the M4 Second Severn crossing had been lifted, which was deemed to usher in a new era of free exchange between Wales and England. Since that time progress on this 'super-corridor'/Western Gateway/Powerhouse has been slow. Although the Report acknowledges that such as development is in line with government thinking and the Centre for Cities report that UK cities are too small and therefore need to combine, it also discusses the deep and abiding legacy of mistrust between Bristol and Cardiff, which threads its way through the history of the BBC in both cities, and also that of HTV which had to create two almost entirely separate offices in each city. Bristol and Cardiff competed fiercely to woo Channel 4, unlike the

comparably adjacent Scottish cities of Glasgow and Edinburgh, which co-operated. Our Report also registers the depth of scepticism amongst our interviewees about such a ‘super-cluster’. One CEO commented bluntly: ‘The regions and nations have very different needs and they operate in a very different way.’

## Slide 20: Approaches

# Approaches to Place-Based Studies

### **Draws on theoretical approaches:**

- Political economy; production studies; media industry studies;

*And spatial/place-based disciplines:*

- Urban studies; regional studies; cultural and economic geography

Understands ‘regions’ as conceptual categories that are socially, culturally and politically constituted and mutable; can be imagined and reimagined.

- Regions are: porous and discontinuous *discursive constructions* created by economic, symbolic and social geographies that are constantly being refashioned by those with power and influence
- Dynamic, constantly changing – not necessarily spatially but symbolically and historically (Edward Soja, *Postmetropolis*, 2000)
- Places ‘leave deep traces on the forms and cognitive meanings’ of media products ... place-specific cultural associations’ deriving from places’ unique characteristics (Allen J. Scott, *On Hollywood*, 2005: xii, 7)



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This slide reviews the theoretical and conceptual basis that underpins our Report. We consider that Allen J. Scott is correct – he also elaborates on this insight further in his earlier seminal *The Cultural Economy of Cities* (2000) – but identifying these ‘deep traces’ offers a challenge for the researcher. Aardman considers itself a very Bristolian firm, but its programmes do not represent Bristol – Wallace and Gromit seem to live in 1950s Preston where Nick Park spent his childhood. We’ve already queried the regionality of the NHU and of BBC Studios.

We contend that regions are dynamic entities, constantly made and remade, imagined and reimagined politically, spatially, economically, socially and culturally. They mean different things to different groups at different periods.

## Engaging with Industry

- ❖ Report follows standard evidence-based academic protocols
- ❖ Report is empirical, based on data collection + interviews; interviews are recognised as 'cultural self performances' (John Thornton Caldwell, *Production Culture: Industrial Reflexivity and Critical Practice in Film and Television*, 2008)

### **Go West! 2.5 is not:**

- ❖ advocacy ('base your company in Bristol');
- ❖ consultancy where there is an agreed expectation and framework dictated by the client/commissioner

### **This can create:**

- ❖ Clash of cultures: different priorities/expectations/values/languages
- ❖ Some acute sensitivities:
  - BBC/BBC Studios;
  - Sale of The Bottle Yard Studios



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We adopted the usual ethical academic protocols. However, this Report is not an academic article, it is a *partnership* or compact between us and Bristol's screen industry sector, notably the 31 interviewees kind enough to give their time generously and who welcomed a further iteration of what they consider to be an important regional study. We gave them right of final cut: they could remove or edit sections they thought either inaccurate or misleading. Thus, although the Report is not advocacy per se – and we resisted any form of direct self-advertisement by companies – we co-operated in this larger project to speak up for Bristol and for the importance of the English regions. We recognise and endorse the Report's use as a form of lobbying by Bristol-based companies and policy makers to 'bang the Bristol drum', to call attention to the issues we think need addressing. Its recommendations are aimed at that hypothetical audience of national policy makers.

However, we recognise that our interviews were not the 'truth', they were, in John Thornton Caldwell's resonant phrase *cultural self-performances*, made for particular purposes, a version of the interviewees' truth at that point in time for a particular audience. We recognise a culture clash that must be negotiated.

Without betraying any confidences, there were particular sensitivities around BBC Studios and TBYS. BBC Studios was far more circumspect about the nature and scope of the Report

than was BBC local news. In fact, they were much more circumspect than any commercial company, which may well be a comment on their nervousness about their status as a money-making entity within the BBC Group. Of course, any profits do not go to shareholders but back into funding the BBC as a public service.

There was a particular and very acute sensitivity around the possible sale and therefore the future of TBYS, which resulted in considerable toing-and-froing about the final text of that section.

## Slides 22

# Researcher Positionality

*Questioning purpose of the report, what contributors were prepared to say and **whose truth the report represents.***

Many factors shape the research's process and the report's narrative:

- External/Stakeholder narrative - Report recovery/growth to attract business and funding support to Bristol and the WECA region
- Companies/Freelancer narrative - Sensitivity around the lack of work, loss of identity, continued uncertainty of sector's recovery

Need for awareness of our biases and assumptions and project's limitations:

- Ability of the report's definitions/framework to capture the change in the sector's clusters
- Many companies/freelancers were unhappy to contribute their data
- Several key companies have closed since the research was completed (Sept 2025)



JK

Positionality refers to the factors affecting our role as academic researchers and the relationships we develop with industry stakeholders, companies and freelancers that we work with. These factors were considered before the research started, during data collection and when writing up findings and after the report was published. Three questions that guided reflection at these stages include:

- What is the purpose of the report?
- What are contributors prepared to say?
- Whose truth does or should the report represent?



It is important to reflect on the purpose of the report and question what it is realistically able to demonstrate; particularly in the case of *Go West! 2.5*, which acts as an update of the second report rather than a full review of the sector, and had fewer resources available for processes such as data collection and analysis than previous reports. This strand of thinking will be further examined by Andrew in an upcoming slide that address the limitations of the project, but I want to emphasise here the role of this report as a snapshot of the sector in 2025. Since the completion of the data collection process, many companies have continued to close. The report, therefore, serves as a reflection of the rapid changes happening in the screen industry, whilst acknowledging that the sector has continued to shift since its publication.

The report is also limited by what companies and freelancers were prepared to share. Many participants may have been selective in what data they were willing to contribute, and a lot responded quite emotionally and didn't wish to engage at all. Many companies, which are simply trying to survive beyond 2025, may not have wanted to disclose their lack of work, appearing to be open online but actually remaining dormant while waiting for work to pick up.

Personally, I became quite aware throughout data collection of two strong narratives that reflected the perspectives held by many participants and contributors:

- External or stakeholder narrative – The desire for the report to demonstrate the sector's recovery and growth to attract business and funding support to Bristol and the WECA region,
- Companies and freelancer narrative – Sensitivity around the lack of work, loss of identity and their continued uncertainty of sector's recovery and their survival.

As an academic researcher, my role throughout the project is to balance the desire for industry recovery with the findings from the analysis of data and other contextual changes in the sector. In noticing the recurrence of these narratives, I began questioning my relationship with the project and any biases that I may impose on the research practice to make sure that whatever the findings demonstrated was an objective representation of the sector at the time. This reflective practice also helped me to ensure that I was respectful of participants situations and was considerate of what they shared and how data was presented.

Positionality, in terms of our responses to those questions and the recurring narratives, was important to think about as it fed into how we shaped the research project and how we presented the final report. How we framed the findings would affect how they were interpreted by the public and screen industry and the resultant impact of the research on the region's screen sector.

## Slide 23

# How the data was compiled

Research into **open/closed companies** during 2022-2025 in WECA region.

Email and call all open companies to ask 3 key questions:

1. Total Annual Turnover
2. Proportion of Annual Turnover from Screen Industry related work
3. Full time Employee Equivalent

Compilation of data from:

1. Companies House
2. Websites, Social Media
3. National, Regional Screen Sector Reports

*WECA SIC/SOC Code Data collected*

**CoPilot** used to generate estimates for the companies based on data gathered for each sub-cluster, previous data from GW 2 and reports/external research reporting national and regional trends for sector as a whole and different sub-sectors



JK

The research method for *Go West! 2.5* focused on updating the data collected for *Go West! 2*. It began by reviewing the companies that were listed as open in *Go West! 2* to see whether they were still open and producing screen content. Then I searched out any new companies that had opened within the WECA region in the past three years.

Once new lists of potentially open companies were created, each company was emailed and then telephoned to ask for the following information:

1. Total annual turnover for the most recent year (preferably 2025 if not 2024)
2. Proportion of annual turnover from screen industry related work
3. Full time employees, or equivalents to ensure freelancers were included, on average over the last year

Many companies didn't respond or chose not to share their data; I used the following sources to gather any data available to answer the three questions:

1. Companies House
2. Websites, Social Media
3. National, Regional Screen Sector Reports

As most of the companies that are open and operating in the screen sector are of micro or medium sized according to the categorisation on the Companies House website, they are not required to share information regarding turnover. This left a large gap in the data as I could not find reliable information regarding companies' annual turnovers, and what I was able to

find would often represent the company's financial status in 2023 as they had not filed more recent accounts. This limited the validity of the findings as I could not observe the financial information for all companies in the same year, so a company's financial stability may have shifted considerably since the last accounting documentation had been submitted.

To account for the gaps, I used CoPilot to help estimate companies' data. I created a set of instructions to input into CoPilot that helped analyse the datasets looking for any patterns and trends. I then cross compared the estimates generated with the data from *Go West! 2* and incorporated data from the companies' online presence to show recent activity and staffing levels. Furthermore, with the support of Economic Analysts working for WECA, I was able to access data from the Office for National Statistics (ONS), which was compiled from the SIC and SOC data based on self-reported Census data. Trends from the data were extrapolated and were fed into CoPilot to help test the estimates that had been generated.

I am aware of the limitations and challenges of using AI and to the best of my ability I have been transparent with my process. Despite the lack of data and the time needed for trial and testing, CoPilot was helpful in incorporating a large range of sources and evaluating multiple trends to estimate the missing data. In the future to improve the workflow and the validity of the results, though a more rigorous AI method a more thorough review of other studies that had used AI for similar purposes would be useful, the issue was the lack of data that companies were willing to share. More support for the data collection process is needed from bodies such as WECA, about which companies would respond more willingly. A more detailed survey is needed too, to help collect more specific information from the companies to help observe a larger variety of trends and changes in the sector.

A list of the sources with a more thorough account of the method used can be found in Appendix 3 of the *Go West! 2.5* report.

## **Slide 24: Going Forward**

## Problems/Issues Going Forward

*Longitudinal Studies lock a particular framework in place to enable data to be comparable across time:*

- Are the original (2017) sub-clusters fit for purpose?
- What is the region we are looking at?  
[Bristol? WECA? Western Gateway?]
- Where are the freelancers??
- How do we capture a sector that is diversifying at pace?  
[Companies with multiple/overlapping affiliations]
- How do we *now* define (in 2026) the 'screen sector'?
- What **is** the 'industry' we are seeking to investigate and analyse?

### **What needs to change for *Go West! 3* (?2027/28)**



AS

This slide tries to capture the interconnected problems raised by the approach and structure of *Go West!* and more general issues. We recognise the rarity and importance of longitudinal studies but to provide comparability between different data periods they severely limit how change is apprehended, specifically the sub-clusters, first formulated in 2017, which we no longer think are fit for purpose.

In keeping with the core agenda of the Report, we think the way in which we are conceptualising and addressing the region needs re-thinking.

Perhaps the key problem is the nature of the film and television industries and *how those industries are changing* as the result not just of economic pressures but more fundamentally because of the shift from linear to online, the transition, happening at pace, into a digital world. Not only are companies diversifying – straddling two or even three sub-clusters – but they are also making work (content) that is not generally considered to be part of the media sector however broadly defined. This has been recognised by academics and industry folk as the ‘de-differentiation’ of the media industries in which boundaries are becoming increasingly porous. We might need to start thinking of these industries not as bounded entities but as a *relational field* of overlapping, intersecting activities.

On the other hand, we have always been resistant to the concept of the ‘creative industries’, a New Labour invention that occludes the specific histories that we argue are fundamental to understanding their locality and function. We are also mindful that the notion of ‘content

producers' elides the nature of the company that produces it. As we have argued, particularly in relation to BBC Studios, these structures are important.

All these things will, of course, be addressed in *Go West!3* ...!!

## Slide 25 Thanks

# Thank you

If you have any questions, please contact:

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Go West!



Go West! 2



Go West! 2.5

Thank you for your generosity in allowing us to talk at such length.

If you would like to access the online copies of the *Go West!* reports you are able to use the QR codes on screen (or links below):

*Go West!* – <https://uwe-repository.worktribe.com/output/897844/go-west-bristols-film-and-television-industries>

*Go West! 2* – <https://uwe-repository.worktribe.com/output/9326472/go-west-2-bristols-film-and-television-industries>

*Go West! 2.5* – <https://uwe-repository.worktribe.com/output/15313568/go-west-25-bristols-film-and-television-industries>

We'd now like to invite questions and comments from the in-person and online audiences.