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BRISTOL ECONOMIC IMPACT

FOREWORD



We are excited to share the findings of this report with you. It demonstrates how firmly rooted the BBC – with our mission to inform, educate, and entertain the whole of the country – is in Bristol. And it showcases our impact in boosting production, employment, and growth across this great city.

Bristol is a special place. Its unique identity, creativity and humour are part of the reason it is known throughout the world. All of the critical roles the BBC seeks to play for our audiences – in pursuing truth with no agenda, backing British storytelling, and bringing people together – are exemplified in this city. There is plenty more for us to do, but this report outlines the great progress we've made in increasing production, growing the economy, and upskilling local talent for the future.

The BBC's legacy in Bristol began 90 years ago, in 1934, when the Lord Mayor first opened Broadcasting House Bristol on Whiteladies Road. Since then, the region has grown to become a global powerhouse of broadcast media production. Some of the BBC's most iconic brands, including *Countryfile*, *Antiques Roadshow*, *The Outlaws*, *Springwatch* and programming for BBC Radio 4, are all produced in the heart of the city. Powerful network radio, such as BBC Radio 6's *The Huey Show*, our Arts and Rural affairs programming, and BBC Audio features, are all made locally too.

Award-winning Bristol-based talent serve the population on our local services every day – including with BBC Points West on BBC One, and on BBC Radio Bristol, Somerset, Gloucester, and Wiltshire across the wider region. Bristolian Broadchurch star Joe Sims wakes up the city with a "Proper Bristol Breakfast" every weekday morning on Radio Bristol. We've also recently expanded our Bristol base to include a second site, Bridgewater House, to further boost our production efforts and reflect Bristol as a city to the wider world.

However, no report on Bristol would be complete without mentioning one very special studio.

The Natural History Unit (now BBC Studios Natural History Unit (NHU)) was first established in 1957, and ever since has set the gold standard for all programming explaining our mysterious, natural world. Programmes like *Planet Earth*, *Frozen Planet*, *Dynasties*, and *Mammals*, which is broadcasting on BBC One at the time of writing, not only push the boundaries of technical innovation, but continually open up new frontiers of scientific discovery.

BBC Studios NHU was the first documentary producer ever to film in HD with *Planet Earth*, which was broadcast on BBC One HD channel in 2006. It was one of the key pioneers in using innovative motion-control timelapse photography when filming in 2019 for *The Green Planet*.



Countless discoveries that help us to understand our natural environment have been revealed by our dedicated production team, and their advocacy for the planet is truly ground-breaking. BBC Studios NHU has been fundamental in carving out a world-leading reputation for Bristol, and it keeps raising the bar.

In 2022 alone, natural history production contributed 44% (£127.2m) to the Bristol screen industry's overall £288m turnover. Between 2019 and 2022, 75% of BBC Natural History commissions attracted inward investment. That means, in this period, for every £1 the BBC Public Service invested, £1.86 was invested by a third party.

This report also demonstrates how the presence of the BBC Public Service commissioning and BBC Studios NHU and Factual Entertainment Productions in Bristol has helped shaped its economy and boosted local employment in a changing media landscape. Natural history, in particular, has been successful in reaching audiences as they have made the shift online – through BBC iPlayer or other streaming platforms.

Bristol's media industry has grown significantly in the last 15 years. The BBC's presence in the city has been a key driver for this "media-boom" – with the production sector's overall workforce increasing by 24.5% since 2017 because of our investment. The BBC was the largest employer in Bristol's TV and film production sector in 2022, with BBC Studios NHU and part of BBC Studios' Factual Entertainment Productions both in Bridgewater House, and BBC Public Service staff based at Whiteladies Road.

Critically, we also work with outside partners, like Bristol City Council and the University of the West of England Bristol (UWE Bristol), to ensure that new, local talent get the training and development they need for sustainable careers.

We hope you enjoy discovering more about the impact of the BBC in Bristol in the following pages. We are thrilled to be able to share this report with you, and hope that the inspiring developments it showcases are just the start of the next chapter in the city's success story.

Here's to another 100 years of the BBC in Bristol!

Written by

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&

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Kate Phillips



Steph Marshall

EXECUTIVE SUMMARY

To coincide with the Creative Cities Conference hosted in Bristol on 23-24 April, this report looks at the central role the BBC plays in Bristol. In particular the presence of BBC Studios NHU, which has developed Bristol into a centre of excellence and remains pivotal in driving turnover and developing talent across Bristol's production sector.

Many of the BBC's heritage brands and most loved shows are produced in Bristol, including BBC One's *Antiques Roadshow* and *Countryfile*, drama including *The Outlaws* and *Boarders*, and 6Music's *The Huey Show* and other programming for Radio 4.

Nonetheless the region is most recognised for its natural history sector – now known as 'Green Hollywood'. The BBC's natural history output is acknowledged around the world as the gold standard for outstanding natural history film making, and almost all of this comes from Bristol. This reputation comes from the decades of groundbreaking work of the BBC's Natural History Unit (now BBC Studios Natural History Unit or NHU), set-up in 1957, and independent producers that have flourished in the last 20 years from inward investment from international investors and commissioners.

Natural History programming remains hugely popular with audiences. *Planet Earth* and *Planet Earth II* are the third and second most rated TV shows on IMBD.

Millions of children have been entertained and inspired by *Andy's Adventures* for CBeebies and *Deadly with Steve Backshall* for CBBC. Willingness to pay analysis indicates natural history programming is valued highly by the UK population. Based on survey of viewers and non-viewers, SIMETRIC-Jacobs estimate the UK population values *The Green Planet* and *Wild Isles* at £56.7m and £51.4m, far above their production value.

This report focuses on three key areas.

- The success of natural history commissioning and how Bristol is globally recognised as the central hub for natural history production.
- How Bristol has become a centre of excellence, driven by the NHU's legacy and reputation, driving innovation on-screen and supporting international scientific research.
- BBC Studios NHU and Factual Entertainment Productions catalytic impact on the wider production sector in Bristol. In particularly, how BBC Studios and others support the region's workforce and talent development more widely across the production sector.



First, natural history has been hugely successful in attracting international investment (Section 3). Over 75% of BBC Natural History commissions now attract inward investment with every £1 invested by the BBC Public Service being matched by £1.86 from a third party. The growth in third-party funding from co-commissions and co-productions has sustained the quality and distinctiveness of the BBC's natural history output. BBC Studios NHU's international reputation for excellence and the high standard of independent producers has been sought out by global streamers and broadcasters and has led to a boom in Bristol's natural history sector.

Not only is Bristol-made natural history watched around the world, but it has significant value. High-end series deliver big economic impact to the Bristol region, even if most filming takes place abroad. Filmed over four years and 27 countries, production of *The Green Planet* is estimated to have contributed £7.4m to the UK economy and supported around 50 full time equivalent jobs, of which the majority will have been concentrated in and around Bristol. This does not include wider social value generated by natural history programming that can increase wellbeing and encourage positive behaviour change amongst audiences and wider society which is estimated at £134m.

Second, R&D plays a central role in natural history content making (Section 4). Creative innovation has meant new formats and finding ways to tell new stories about wildlife and ecosystems. In part this has been spurred on by competition amongst independent producers and BBC Studios NHU for commissions and talent. It also relies on technological innovation, using new technology that allows filmmakers to capture previously unseen stories from the natural world and bring this to audiences. BBC Studios NHU's Innovation team has been at the forefront for decades and

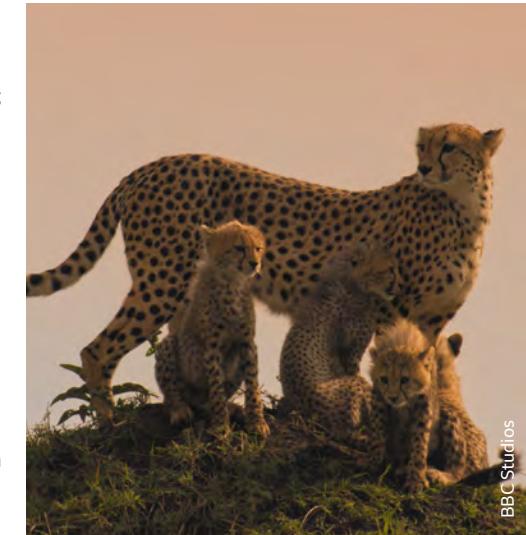
is supported by a number of specialist innovation labs that work across BBC Studios NHU and the independent sector. Technical innovation has direct spillovers into scientific research. Close collaboration between natural history production and the scientific community in Bristol and internationally has not only introduced new equipment and technologies to researchers but has led to new scientific discoveries that then become the subject of future natural history content.



Third, BBC Studios plays a key role in Bristol's talent pipeline (Section 5). The scale of BBC Studios (which includes BBC Studios NHU and BBC Studios Factual Entertainment Productions), alongside large indies such as Plimsoll and Silverback, and the breadth of independent producers in the city offers more, stable careers and development opportunities to production talent without needing to move to London. The city's longstanding natural history specialism comes from the Natural History Unit, and almost all of the natural history indies

have close links to BBC Studios NHU, being set up by or employing former senior staff. Whilst working for BBC Studios, staff and freelancers have access to a wide range of career development and training; from early-careers to development for mid- and senior professionals, as well as support from underrepresented backgrounds. BBC Studios – in particularly BBC Studios NHU – works closely with skills organisations in Bristol to support outreach and sector entry (more detail on individual organisations in Sections 5.3 and 5.4). BBC Studios NHU's most significant skills partnership has been the BBC-accredited MA in Wildlife Filmmaking, co-designed and delivered by the University of the West of England, Bristol (UWE Bristol). Now in its twelfth year, the course has a high success rate with around 94% of graduates finding employment each year. Fully funded scholarships to the course form part of BBC Studios NHU's international talent initiative Project Songbird. Launched in 2022, the scheme aims to diversify production talent whilst delivering a more sustainable and inclusive industry by fostering development of local crews.

Bristol's production sector looks to continue to be diverse and thriving into the long-term future (Section 6). Although the region, like much of the UK, faces some immediate challenges due to the curtailment of international commissioning spend and recent economic conditions, there's confidence across the sector. Bristol's natural history sector has previously withstood many cycles of commissioning spend expanding and contracting, always remaining the global centre for natural history production throughout. The region's emergent drama sector also continues to build momentum due to the strategic focus of Bristol City Council's Film Services and the West of England Combined Authority, which hope to draw greater inward investment to the region. The successful bid to see Channel 4's Creative Hub relocate to Bristol has resulted in greater coordination across the region's



BBC Studios

screen sector stakeholders to identify opportunities and tackle issues affecting the local production and entry-level talent. It is hoped that diversifying the region's screen production sector across unscripted and scripted genres will provide further resilience and greater economic scale and employment security in the Bristol region.

The report was written and prepared in-house by economists in the BBC Public Policy team. It is based on research interviews with stakeholders from across Bristol's screen industries and analysis of data provided on BBC Public Service commissioning and BBC Studios NHU production activities. This is supported by desk research of information published by BBC, industry and academia (set out in Section 1.2).

1 INTRODUCTION

The BBC footprint in Bristol is significant, with some of the BBC's most loved shows being made in the region by BBC Studios and Bristol-based independent producers.

Almost all of the BBC's natural history output comes out of Bristol, coined 'Green Hollywood', given the city's specialism and long-standing reputation built by the Natural History Unit (now BBC Studios Natural History Unit) and independent producers. BBC Natural History is considered by many to be the 'jewel in the crown' of the BBC's output.¹

"Bristol is home to the best wildlife filmmakers in the world. It's the global hub of natural history production and programmes produced here have reached hundreds of millions of people in all corners of the planet.

Quite simply, content made in Bristol has inspired a global audience to love and understand the natural world; it's transformed the way an entire generation view and interact with the nature."

*Dr Jonny Keeling, Head of BBC Studios NHU
Quote provided for purposes of this report.*

For decades, audiences around the world have been captivated by landmark BBC series, such as *Blue Planet* and *Planet Earth*, but also by the breadth of natural history across formats, from Children's to live. These have brought public awareness of the natural world and environmental changes affecting all life on planet Earth. The BBC's natural history commissions are perhaps the best example of the BBC delivering its mission, offering "high-quality and distinctive output... which inform, educate and entertain."

The Natural History Unit (NHU) was established in Bristol in 1957, building on the West region's early specialism in wildlife and natural history programming. The NHU has produced some of the BBC's best-performing Factual titles, including *The Blue Planet* (aired in 2001), *Planet Earth* (2006) and *The Watchers* series (beginning *Springwatch* in 2005).

Kids shows such as *Andy's Adventures* and *Deadly with Steve Backshall* educate and entertain children by introducing them to stories from the natural world.



¹ <https://www.bbc.com/historyofthebbc/100-voices/entertaining-the-nation/natural-history>



“People fundamentally still love these shows and new audiences discover these shows because they do offer and open your eyes to a world that most of us will never get to see. They immerse you. Especially how we [the NHU] tell our stories. If you get it right, the strongest ones, these very empathetic, very connectable, very relatable films which tell you about detail of the animal life, but they also step back and tell us about a little bit about our place in the universe or in the planet. They’ll always have an important role to play.”

Mike Gunton, Creative Director at BBC Studios NHU

The NHU’s content has reached huge international audiences – for example, *The Green Planet* (2022) has been distributed to almost 150 territories – and with the NHU’s international reputation for excellence, it is sought out by global streamers and broadcasters including AppleTV+, Nat Geo/Disney+ and NBCU.

“Bristol as a network centre, as the BBC used to call, has always punched above its weight chiefly due to natural history.”

Grant Mansfield, CEO and Founder at Plimsoll Productions

Bristol is also home to the largest division of BBC Studios Factual Entertainment Productions, with bases across Cardiff, Glasgow, London and Manchester. The Bristol division makes many of the BBC’s heritage brands on BBC One and BBC Two, including *Antiques Roadshow*, *Gardeners World*, *Countryfile* and a range of other BBC programming including *Hungry For It* and *Nigella’s Amsterdam Christmas Special* and a growing slate for Channel 4 and Channel 5 including *Unique Boutique* and *Rescue 999*.

Both BBC Studios’ production units are now based at Bridgewater House at Finzels Reach, near the centre of the city. Network radio that comes out of Bristol includes 6Music’s *The Huey Show* and much of BBC Audio’s Features, Arts and Rural Affairs output including *The Food Programme*.

The BBC’s Commissioning Editor for Factual Entertainment and Events, Jasmyn McGuile, is based in Bristol, and the city has seen several network commissions filmed there recently, including *The Outlaws*, written and directed by Stephen Merchant, and comedy drama *Boarders*.

1.1 Scope and analytical approach

This report explores the BBC's influence on the production sector in Bristol. Our focus is on the BBC's natural history commissioning and the groundbreaking Natural History Unit (NHU) that has led to Bristol's international reputation as 'Green Hollywood'. We touch on the broad production ecosystem driven by animation, factual entertainment, and drama.

This report was prepared in-house by economists in the BBC Public Policy team. The analysis presented is based on:

- Primary research from BBC-led stakeholder interviews with 25 individual working across Bristol's screen industries (list provided in Annex I).
- Analysis of BBC Public Service commissioning data, BBC Studios NHU production data, and BBC Studios' employment figures as well as a review of BBC Studios' training support and BBC Studios NHU Innovation activities.
- Economic modelling to estimate the gross value added (GVA) of *Green Planet* produced by BBC Studios NHU and *Wild Isles* produced by Silverback.
- Complementary desk research of information and reports published by the BBC, industry and academia.

1.2 Structure of this report

The report is structured as follows.

- Section 2 describes Bristol screen industries at present, noting the key production subsectors (genres) and the main industry stakeholders.
- Section 3 considers the success of natural history commissioning and impact on BBC Studios NHU and other natural history producers, with consideration of recent challenges.
- Section 4 highlights the impact on innovation, research and development (R&D) and scientific collaboration within natural history programme making.
- Section 5 describes Bristol's production workforce and the central influence of BBC Studios, as well as highlighting the ways in which BBC Studios' invest in career skills across the sector.
- Section 6 considers the future of Bristol's production sector for natural history and other genres.
- Annex I lists the key stakeholders that were interviewed as part of the BBC's qualitative research for this report and other contributors. We'd like to thank them for supporting this research.



2 BRISTOL'S SCREEN SECTOR TODAY

Bristol is a well-established, vibrant and diverse creative cluster that has built incrementally on longstanding creative companies. The BBC's relationship with Bristol began in 1934, leading to a 90-year legacy anchoring Bristol's creative cluster.

This has resulted in creative employment in Bristol being proportionally larger than the UK average across all subsectors.² The 'Film, TV, Video and Radio' subsector is particularly over-represented. BBC Studios NHU, formed in 1957, is the world's largest wildlife production unit and, along with a cluster of independent production companies, has earned Bristol the title of 'Green Hollywood'.³

"We very much portray ourselves, Bristol and Bath, in the West of England, as a creative region. It is the life blood of our region."

Nona Hunter, Creative Industries Senior Project Manager, West England Combined Authority (WECA)

Creative industries growth has been driven by the expansion of the region's long-established production sector. Growth of screen production in the Bristol region has been attributed to three principal factors: "the presence of a major broadcaster (the BBC), the spectacular expansion of Aardman Animations; and the growth of independent production."⁴



² ONS creative industries subsectors include: Advertising & Marketing; Architecture; Craft; Design; Film, TV, Video & Radio; IT, Software & Computer Services; Museums, Galleries & Libraries; Music, Performing & Visual Arts; Publishing.

³ PWC (November 2022), *The role of the BBC in creative clusters: Analysing the BBC's wider impact on the UK economy*. As described page 19.

⁴ Spicer, A., Presence, S., & Frymus, A. (2022). *GO WEST! 2 Bristol's Film and Television Industries*. Bristol: UWE Bristol. Page 17.

2.1 Overview of Bristol's production sector⁵

The screen industries have been a key catalyst for a decade of significant growth in Bristol and the wider region, and are economically significant. The screen sector contributed £274.4m to the West of England regional economy (measured in gross value added (GVA)).⁶ Data provided by the West of England Combined Authority (WECA) shows that around 5,100 full time equivalent (FTE) employees work in the film and TV sector (a 178% increase from 1,879 in 2016) across the West of England.^{7,8}

Spicer et al (2022) classify Bristol's screen production sector into "seven distinct but often overlapping [sub-sectors]: production companies working across the four major genres in the city – (1) animation, (2) branded content, (3) factual, and (4) natural history; (5) a small but growing number of Bristol-based drama producers; (6) post-production companies; and (7) a whole range of 'facilities' firms that provide vital support services across the sector."⁹ The latter includes studio complexes, equipment hire companies, aerial filming specialists, makeup artists and transport firms amongst others that all primarily support filming activities.

Their analysis states that natural history production contributed 44.2% or £127.2m to Bristol screen sector's overall £288m turnover in 2022. Estimated turnover for factual (including factual entertainment) production was £35.9m, contributing 12.5% of total turnover and meaning it is the second largest production sub-sector.

Animation was the third largest sub-sector with production revenues of £33.6m or 11.7%. Natural history and factual production categories are also the largest sub-sectors in terms of employment; collectively representing more than half of the Bristol production workforce.¹⁰ While there are large players like BBC Studios NHU, Plimsoll or Silverback, c.65% of firms in Bristol screen industries are 'micro' firms (turnover of less than £500k).

"It's undeniable that the ecosystem in Bristol is as strong as it is because of the role of the natural history sector... Research shows the high level of industry turnover in [the] city and city region and the wider supply chain of facilities companies, post production, all that ripple effect [across] the industry can be attributed to the growth of natural history programming."

Natalie Moore, Bristol UNESCO City of Film Manager at Bristol UNESCO City of Film

The number of independent companies also rapidly expanded, from 131 in 2017 to 189 in 2022.¹¹ The independent production sector alone generated a £197.5m turnover, representing 40.8% increase in turnover from the £140.3m generated in 2017.¹² There were 17 Bristol-based production companies specialising in natural history in 2022, including BBC Studios NHU.¹³ Almost all others have close links to the NHU with several being established by former NHU staff.

"The Natural History Unit has been in Bristol for a long time. It predates all the other media activity that's grown in Bristol... In the beginning the only place to make wildlife films was the BBC. So all of us started there, and all of those that are running the independents in Bristol started their career in the BBC... There's a big range of post-production houses in Bristol, not as big, but a number of really good ones that support largely natural history."

Alastair Fothergill, Executive Director at Silverback Films, and former Head of the NHU (1992-98)

Another part of the NHU's legacy impact is the development of a post-production supply chain in Bristol. For example, natural history production was key in establishing post-production house Films at 59 which supports clients across all genres and expanded into equipment supply (camera rental).

"In 1990 it was the commitment of a David Attenborough narrated natural history series that, in effect, launched the business... and that gave us the springboard to develop and grow our post production and kit rental over the past 34 years. Bristol being a centre of excellence for wildlife film-making, and the production teams involved, have been a big part of our business."

George Panayiotou, Business Director at Films@59

⁵ This section borrows heavily from Spicer, A., Presence, S., & Frymus, A. (2022).

⁶ Data provided by the West of England Combined Authority. Sourced from Lightcast.

⁷ *Ibid.*

⁸ WECA employment figures for West of England do not account for freelancers in production sector. In 2019, 54% of those engaged in film and video production were self-employed.

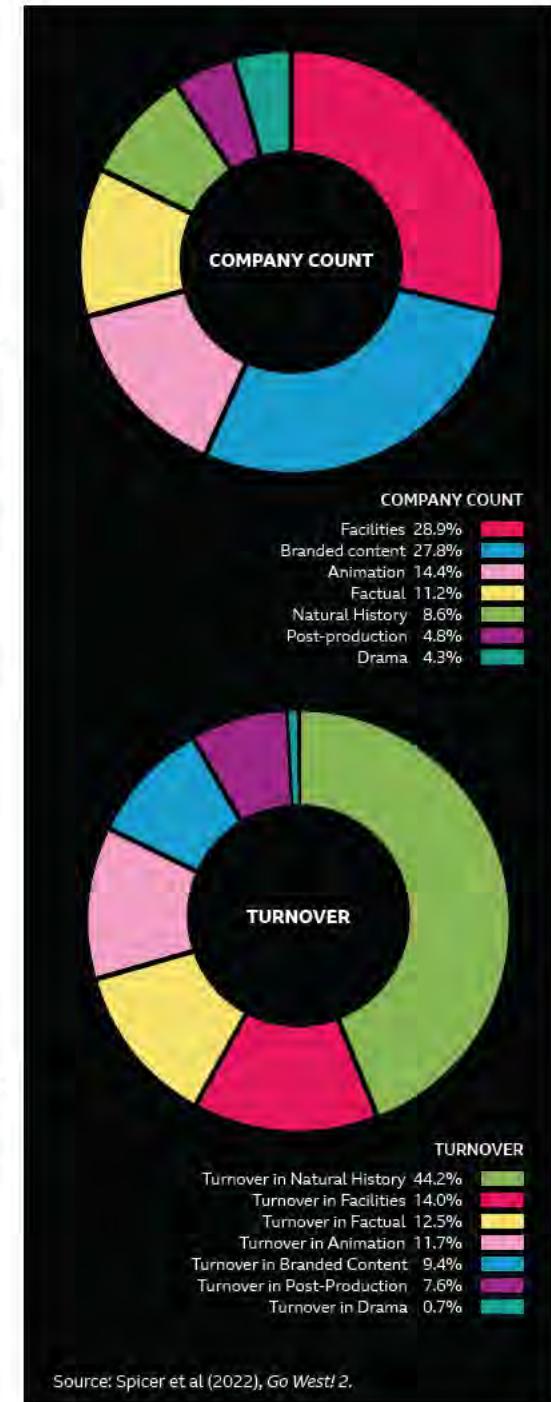
⁹ Spicer, A., Presence, S., & Frymus, A. (2022). Page 49.

¹⁰ The nature of Bristol's screen sector workforce is addressed in Section 5 as part of a wider discussion on the employment and skills investment.

¹¹ Independent companies includes those providing supporting services as well as independent production companies.

¹² Spicer, A., Presence, S., & Frymus, A. (2022).

¹³ *Ibid.*



2.2 Key players in Bristol's Film and TV industries

As described above the BBC has a long history with the city of Bristol. With the formation of BBC Studios in 2017, the NHU become one of several units within BBC Studios' production. BBC Studios also has part of its Factual Entertainment division based in the city.

"Bristol is an extraordinary sector, not just with the Natural History Unit, there are big returning series that come out of Finzels Reach... Antiques Roadshow, Countryfile, these massive rollers, whole of Sunday night programming."

Lynn Barlow Assistant Vice-Chancellor Creative and Cultural Industries Engagement at UWE, Bristol.

The Bristol region's production sector has been significantly shaped by many other producers and organisations.

Bristol has also been home to Aardman Animation since 1976, the Academy Award winning creators of *Morph* for the BBC, *Wallace and Gromit* and its various spin-offs. Aardman has seen global success with a range of feature films, but continues to produce content for the BBC, such as *Things We Love* – a series of 30-second-long shorts featuring animated animals matched to the audio of real, unscripted interviews.¹⁴ Aardman has enjoyed remarkable growth since it was established 45 years ago and now employs more than 150 staff.¹⁵



The city is also home to a diverse range of independent producers, that first started to emerge following the creation of Channel 4 and the introduction of the independent production quota for other PSBs, including the BBC.¹⁶ Bristol's independent production sector has evolved and grown over the last 30 years, although – like much of the indie sector elsewhere – it has fluctuated in response to changes in commissioning budgets and wider economic conditions. Section 3 discusses the growth of natural history producers in Bristol, with Section 3.2 addressing the recent reduction in overall commissioning driven by the global economic slowdown.

Bristol City Council has been strategic in supporting the sector through its Bristol Film Office, the Bottle Yard Studios and Bristol UNESCO City of Film office. The Bristol Film Office was first opened in 2003, aiming to provide support for productions seeking to film in and around Bristol and works closely with the Bath Film Office. In 2010, the Council opened its own studio facilities, The Bottle Yard Studios, in part as an initiative to retain production capacity and talent base following the BBC's decision to relocate *Casualty* and other Bristol drama production to Cardiff the previous year. The Bottle Yard Studios now have 11 stages for hire and more than 20 on-site businesses that provide specialist support services. The facility's sustainability action is internationally recognised.¹⁷

Bristol was awarded UNESCO City of Film status in 2017, with the successful bid led by Bristol City Council and the University of the West of England (UWE Bristol). The Bristol UNESCO City of Film Office has created an action plan "to fulfil the city's commitment to developing the film, TV and moving image sector in an inclusive and sustainable way" and use the anticipated growth of the city's screen sector as a "catalyst for local sustainable development".¹⁸ The priorities under the action plan are skills, environmental sustainability, regional storytelling, international engagement and collaboration – progress against each priority will be assessed in 2026 when the next progress report will be shared with the UNESCO Creative Cities Network.

West of England Combined Authority (WECA)'s current Creative Growth Programme is designed "to support local creative businesses unlock economic growth"¹⁹ through £1.275m support awarded by DCMS. The Programme offers a Dedicated Peer Support Programme, and workshops and training, as well as financial support (a £2,500 grant) to businesses to spend on professional sector experience such as coaching or mentoring. Section 6 discusses future regional authority initiatives in more detail.



¹⁴ <https://www.bbc.co.uk/mediacentre/2024/things-we-love-bbc-creative-aardman>

¹⁵ Spicer, A., Presence, S., & Frymus, A. (2022).

¹⁶ Channel 4 was launched in 1982 as a publisher broadcaster without its own production capability. The Broadcast Act 1990 introduced a duty on the BBC, ITV franchises and Channel 4 to include independent productions in their television services.

¹⁷ For example, The Bottle Yard Studios won the 2023 Global Production Award for Best Sustainability Initiative in recognition of the rooftop solar array that powers the studios' second (expanded) site.

¹⁸ UNESCO and Bristol City of Film (2023), Bristol UNESCO City of Film UCCN Membership Monitoring Report 2017-21, <http://bristolcityoffilm.co.uk/wp-content/uploads/2023/01/Bristol-UNESCO-City-of-Film-Membership-Monitoring-Report-2017-21.pdf>

As described in Section 6, proposed mid-term action plan 2021-25.

¹⁹ <https://www.westofengland-ca.gov.uk/growth-hub/create-growth-programme/>

The University of the West of England, Bristol (UWE Bristol) has been a strong advocate of the region's screen industries, collaborating with the BBC and wider production sector, regional authorities and other bodies. UWE Bristol is also a key part of the talent pipeline for Bristol, offering practice-focused journalism and production courses at undergraduate and postgraduate levels. Higher education provider Boomsatsuma works closely with industry to provide courses and opportunities across the Bristol creative industries. The University of Bristol Science faculty also has a close relationship with BBC Studios NHU, shaping courses - and as a career destination for many graduates (see Section 5.3).

More recently, Bristol has welcomed Channel 4's Creative Hub which opened in January 2020. Bristol stakeholders came together in a co-ordinated bid led by Bristol City Mayor, Marvin Rees. This brings new opportunities for the region's screen sector, with network commissioners now based in the city, and Channel 4 committing to have 50% of its production spend outside of London.

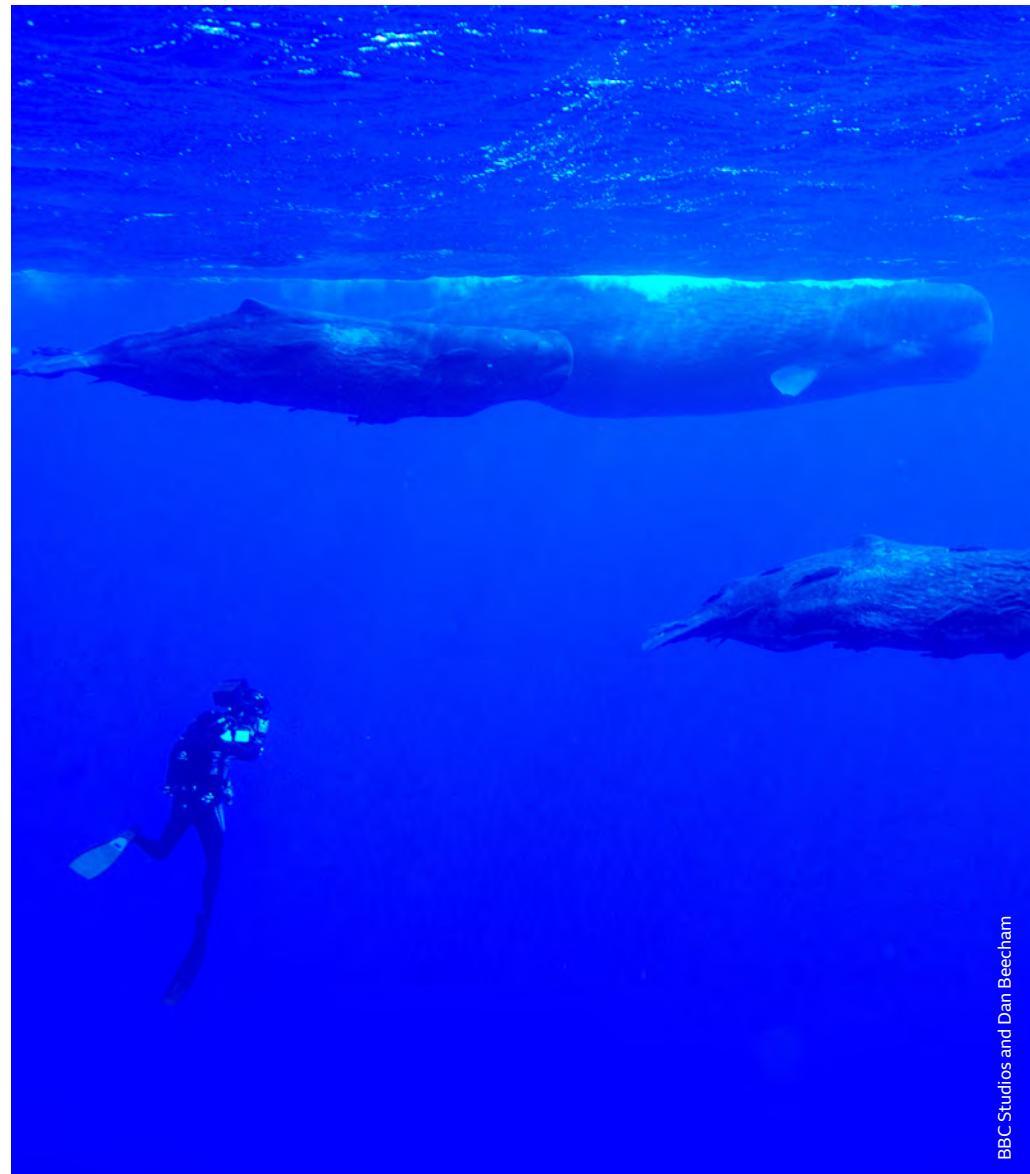
"Establishing a Creative Hub in Bristol gives Channel 4 the opportunity to build on thriving production communities in the city and to partner with Cardiff and harness the power of the wider creative industry across the South West and Wales. The city also put forward exciting social mobility proposals to develop talent across the wider region."

Sinead Rocks, MD for Nations and Regions, Channel 4²⁰



The BBC Public Service co-funds the Fast Track Wales and West initiative with Channel 4, S4C and Creative Wales. Now in its third year, Fast Track Wales and West offers placement based training for Senior Factual off-screen talent²¹ and aims to turbocharge the careers of talented producers and enrich the Welsh and West production ecosystems.

Bristol screen industries have wide support from many organisations which include – but are not limited to – Creative UK's Bristol office, the Royal Television Society's South West branch, the Watershed, ScreenSkills, Cables and Cameras, Gritty Talent, Bristol Ideas (previously Bristol Cultural Development Partnership), Business West, Invest Bristol and Bath, and Bristol's various film festivals. The latter includes the bi-annual Wildscreen Festival, the world's largest natural history film festival which BBC Studios have been a headline sponsor for 2022 and 2024.



²⁰ Statement provided by Channel 4 following research interview with Channel 4 colleagues.

²¹ Fast Track West and Fast Track Wales are trained as a single cohort in order to make best use of synergies between the sectors in Wales and West of England.

3 NATURAL HISTORY SUCCESS IN BRISTOL

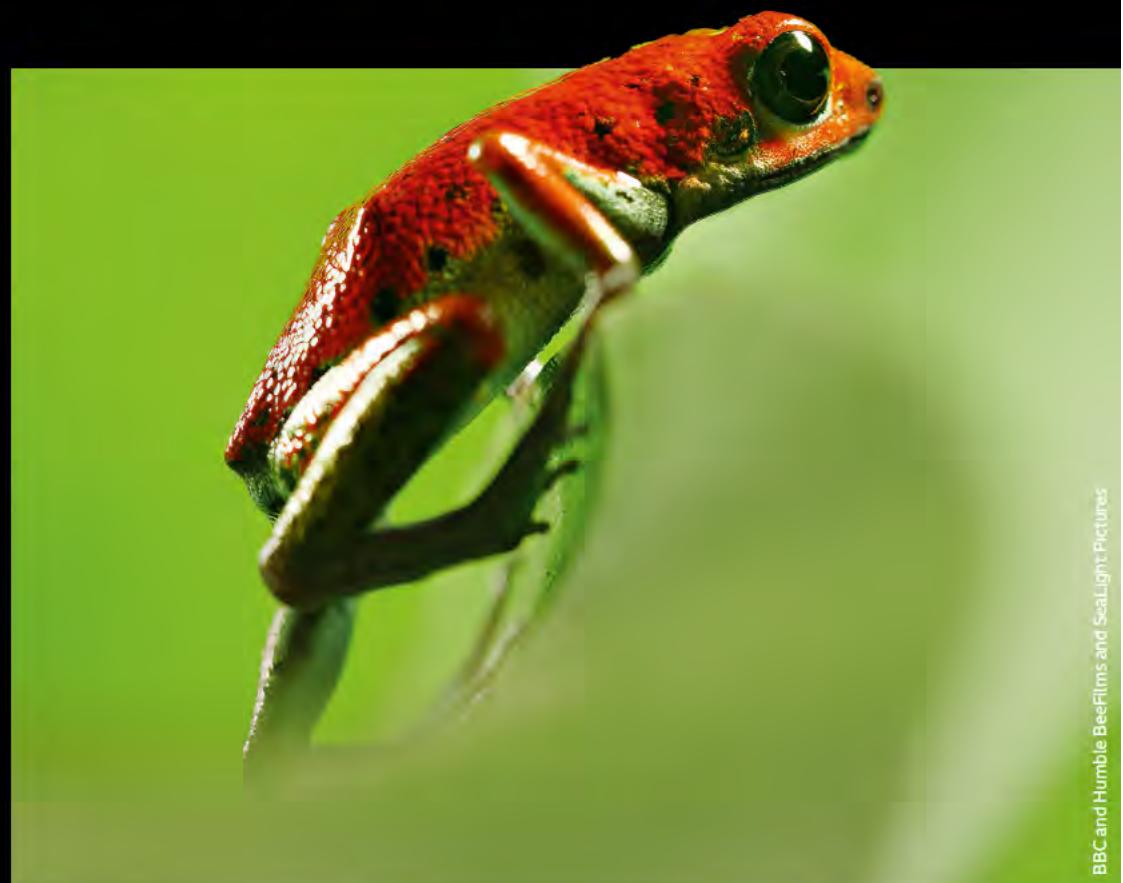
“There is no doubt that the BBC is still globally seen as the gold standard in natural history.”

Alastair Fothergill, Executive Director at Silverback Films and former Head of the NHU (1992-98)

The BBC's natural history output is seen around the world as the benchmark for outstanding natural history film making. This reputation has been gained from decades of work from the NHU, and the various independent producers now based in the city who have continued to strive for high quality natural history programming. This has allowed the BBC to continue delivering world-class content for UK and global audiences by attracting inward investment from international partners.

Over 75% of BBC Public Service commissions that aired between 2019 to 2022 attracted inward investment (42 of 54 programmes and series).²² Over this period, for every £1 the BBC Public Service invested, £1.86 was invested by a third party.

The amount of third party funding involved in making world-class programmes for the BBC can vary significantly, depending on the programmes and the partners involved. For example, BBC's original *Attenborough's Life in Colour* (2021) produced by Humblebee was commissioned with external funding from Netflix, Channel 9 Australia, Screen Australia and Australian OTT service Stan. BBC's *Chris and Meg's Wild Summer* (2021) and *Wild Adventures* (2021), however, were fully funded by BBC Public Service.



²² Excludes natural history produced for Children's. Returning series counted as separate titles, e.g. four years of *Springwatch* counts as four titles



Third-party funding from co-commissions and co-productions has sustained the quality and distinctiveness of the BBC's original natural history content, particularly in the last decade as public service commissioning budgets continue to be constrained due to below-inflation licence fee increases.²³ Such co-commissioned titles include: *The Green Planet* (BBC Studios NHU, 2022), *Our Changing Planet* (BBC Studios NHU, 2022), *Primates* (BBC Studios NHU, 2020) and *Spy in the Wild* (John Downer Productions, 2020).

"If there's an upfront modest investment/ commission from the BBC, for the UK rights, that can then be used as a catalyst from which to attract external third-party funding via co-production or distribution deficit finance then this will help drive the editorial ambition for all parties including the BBC.

In this way the BBC is getting added value, and still crucially is getting more content than if we return to a BBC fully funded model. I would advocate a mixed funding model genre approach that feels balanced can really help the BBC to achieve its creative ambitions."

Dr Wendy Darke, CEO and Founder at True to Nature and former Head of the NHU (2012 – 2016).

Co-commissions with streamers and investment by overseas PSBs and broadcasters tend to follow programming that has global appeal. However, the BBC Public Service also commissions a wide range of UK specific natural history programming, such as *Springwatch*, *Autumnwatch* (until 2022)²⁴ and *Winterwatch*.

These have been predominantly funded by BBC Public Service, however, partnerships with other UK institutions crowd-in investment. For example, the 2019 series of *Autumnwatch* and 2022 *Springwatch* series were funded through a content partnership with the Open University that supported the delivering of their mission.²⁵

BBC Studios NHU has an international reputation for excellence and is sought out by global streamers and broadcasters. While BBC Public Service remains the NHU's largest commissioner in terms of commissioned titles and hours, over half of the NHU's commissioning in terms of value now comes from non-BBC commissioned titles.²⁶ *The Year Earth Changed* was a significant milestone as the NHU's first commission for a global streamer when it was delivered to Apple TV+ in 2020/21.

"Clearly there are business benefits by having a broader range of partners... but creatively, [commercial commissions are] fascinating because you are working for a different and quite bespoke audience. For example, I'm working for NBCU, a fully commercial national broadcaster, on *The Americas*... For us creatively (and as Brits), it's fascinating because you're now having to make shows for an American audience. Each episode has six acts. It has commercial breaks and each is only 42 min long. It's narrated by Tom Hanks. So it's got a very different timbre to it..."

Working for Apple TV+, again, [has been] very different. They're a high-end streamer with a very distinct kind of offering to the audience, and so [for the NHU] fitting in with that ethos, has been fascinating as well... [Working on commercial commissions has been] a very rewarding and expanding experience, all of which, of course, feeds back to anything you make. So it will definitely impact how I'd make public service [content] and equally some of the public service ethos that we apply will feed into some of their [commercial] programming."

Mike Gunton, Creative Director at BBC Studios NHU

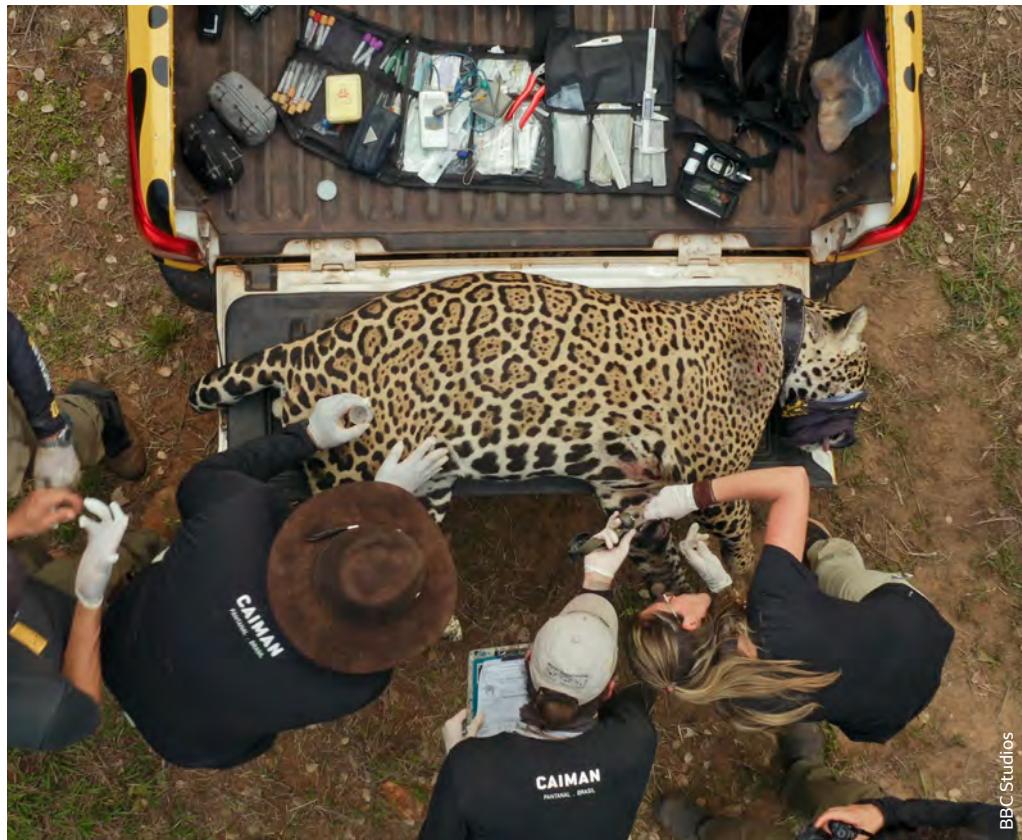
By the end of 2024/25, the NHU will have delivered more than 270 hours of content, for a range of international customers including Warner Bros.

²³The estimated impact is more than a 30% real terms cut in BBC licence fee funding since 2010, Enders Analysis (10 September 2021). BBC licence fee settlement: A diminished TV ecology. <https://www.endersanalysis.com/reports/bbc-licence-fee-settlement-diminished-tv-ecology>

²⁴<https://www.bbc.co.uk/mediacentre/statements/the-watches>

²⁵The Open University contributed approximately 20% of the gross budget towards the 2019 *Autumnwatch* and 2022 *Springwatch* series.

²⁶Based on analysis of the NHU productions delivered between 2020/21 and 2024/25. Non-BBC commissioned titles do not have any budget contribution from BBC Public Service.



Discovery, NBCU, Disney+/NatGeo, Bilibili, Migu and AppleTV+, bringing investment from around the world to Bristol.

The success of natural history in Bristol extends well beyond BBC commissioning and BBC Studios NHU production. The last decade saw a boom in independent natural history producers in Bristol. Global distributors invested in Bristol's indie production companies²⁷ whilst global streamers and international broadcasters have invested in indies by commissioning content that's visually stunning and easily translated into local languages, much-loved by audiences whilst becoming increasing relevant in the face of environmental change.

“You’ve had Silverback, you’ve had Wild Star, you’ve had Plimsoll, you’ve had Offspring, you’ve had Humble Bee [Films] – and they’ve all grown recently within the last 10 years. The only reason they’ve been able to grow is the streamers. The BBC [public service] didn’t have enough work to support the growth of all those independents.”

Alastair Fothergill, Executive Director at Silverback Films and former Head of the NHU (1992-98)

However, for independent producers, securing a BBC Public Service commission can remain invaluable. This is partly because a BBC commission provides a “gold stamp of approval” and a platform which can be useful to demonstrate credibility and open the door to other sources of third party funding. A BBC commission can be particularly impactful for emerging indies who are still developing their reputation and have a limited track record.

“The BBC is a sort of global standard of authenticity, reliability and quality... If we can say the BBC are on-board with a project in development, then we know it opens the door to a conversation with third-party co-commissioners, though it does not guarantee they are going to production.”

Andrew Zikking, Managing Director Production at Off The Fence Productions

²⁷ For example, ITV Studios has invested in Plimsoll Productions, Fremantle in Wildstar Films, and All3Media in Silverback.

3.1 Present challenges – commissioning boom to bust

As production restarted following the lockdowns in 2020, Natural History production in Bristol surged as delayed projects commenced, others resumed production and new programmes were commissioned. However, this level of activity has not been sustained and the last 18 months has seen a fallow period caused by the notable decline in content investment from global streamers and stagnant public service broadcaster commissioning budgets.

“The recession and changing market, and pullback in commissioning has, for us, more noticeably come from streamers rather than the BBC... It’s somewhat of a bubble bursting and an industry-wide contraction.”

Andrew Zikking, Managing Director Production at Off The Fence Productions

Reduction in commissioning has affected different genres and regions to varying extents (further discussed in Section 5). Several natural history indies have closed, including Icon Productions. This translates into fewer opportunities and greater uncertainty for the large freelance workforce²⁸ as well as production houses cutting back on their permanent staff.

The NHU is not immune to the market slowdown and, on 14 March 2024, announced redundancy proposals to close 25 to 31 creative posts in the Unit, representing up to 7% of roles.²⁹

Despite the current conditions, there is confidence that Bristol’s natural history production sector will pull through. Several BBC interviewees noted the cyclical nature of the screen sector, how the natural history sector has previously been affected from both changes in commissioning budgets and content trends.

“Natural history is a genre which expands and contracts naturally. There’s cycles and yes, there is a contraction at the moment... After Covid there was a surplus [of] projects commissioned, and hopefully, we’ll refine that balance. We’ve got such a great talent base here, and it’s such a great city in terms of creating amazing content that I’d hope that we would attract more business back...in the next few years.”

Alex Williamson, Founder and Creative Director at Offspring Films



Getty Images

3.2 Natural history’s economic and social impact

Natural history production creates significant economic and social value, particularly for landmark series that have typically higher production budgets and the widest audience engagement.

Within Bristol, natural history production supports a significant footprint of businesses and workforce – both within production houses and the supply chain (further discussed in Section 4) – which in turn will support other businesses and employment in the region’s wider economy when employees spend their income. The global nature of wildlife filming means that a substantial portion of the economic value often occurs overseas when crews travel overseas and/or work with filmmakers and suppliers based outside the UK.

Here we measure the economic value to the UK economy from UK-based production activities of two recent BBC Natural History series, measured as gross value added (GVA) calculated on the basis of income approach.^{30,31}

The Green Planet, a 5-episode series produced by the NHU, was filmed over four years across 27 countries. However a significant portion of budget was still spent in the UK on Bristol-based production staff and within the UK supply chain. *The Green Planet* still contributed £7.4m in total GVA to the UK economy and supported over 50 full time equivalent jobs.

²⁸ Freelancers make up 28% of the screen industries workforce across the UK, and proportion of freelancers can be as high as 50% in the production sector. Source: <https://www.screenskills.com/developing-your-career/freelance-toolkit/what-is-freelancing/#:~:text=Freelancers%20make%20up%2028%25%20of,work%20is%20primarily%20project%2Dbased>.

²⁹ <https://www.broadcastnow.co.uk/bbc-studios/bbcs-natural-history-unit-to-close-up-to-7-of-roles/5191599.article>

³⁰ We measure economic impact via gross value added (GVA), calculated on the basis of income approach. GVA, in simple terms, is an economic productivity metric that is the value of goods and services less the cost of all inputs and raw materials. The *Green Planet* and *Wild Isles* GVA model is consistent with that used to measure economic impact of *Doctor Who*, though it uses production budget data for each series (rather than time series).

³¹ BBC GVA model of production activities is described in Annex II of: BBC (2023), *Doctor Who: Economic Impact*, <https://www.bbc.co.uk/mediacentre/documents/doctor-who-economic-impact-report-fin.pdf>

By comparison, *Wild Isles*, a 5-episode landmark series on the wildlife of the British Isles, produced by Silverback Films, was filmed over three years in 145 locations across the British Isles. As such almost all its budget was spent in the UK. Therefore, over the three years of filming, we estimate that *Wild Isles* contributed £9.0 million in total GVA to the UK economy supporting a little over 80 full time equivalent jobs, despite the smaller overall budget.

Content is not just about the economic impact we see in the production of the programming. There are a range of spillover effects that support innovation and scientific research (discussed in Section 3) and human capital investment in sector skills (Section 4). There can also be significant social impact, with natural history programming not only delivering content audiences perceive as value for money but also changing audience perceptions and inspiring behaviour change.

BBC Public Service original natural history provides the BBC with a “key opportunity or ‘sphere of influence’ [in] its content and editorial” to support and inspire pro-environmental behaviour change amongst UK audiences.³²

Research commissioned by the BBC finds that viewers of *The Green Planet* were more likely to engage in positive environmental behaviour as a result of watching the programme, compared to non-viewers. For example, *The Green Planet* viewers were 24.7% more likely to visit a park or garden, 20.6% more likely to pick up litter, and 21.9% more likely to make an effort to be more attentive to nature after watching the series compared to non-viewers.³³ Similar positive behaviour changes that led to improved sense of wellbeing were found amongst viewers of *Wild Isles*. At the societal level, the total value due to increased wellbeing associated with watching *Wild Isles* was estimated to be £134.7m due to positive behaviour change in viewers.^{34,35}

UK audiences put a high monetary value on original natural history content. The estimated total value to the UK population of *The Green Planet* programme was £56.7m,³⁶ and *Wild Isles* was £51.4m based on willingness to pay amongst viewers and non-viewers.^{37,38}



BBC and Silverback Films and Alex Board

³² SIMTRICA-Jacobs (2022), BBC The Green Planet Programme: Analysis of Social Impact Report. Report commissioned by BBC Sustainability.

³³ SIMTRICA-Jacobs, Measuring the impact and social value of The Green Planet Programme, Dr Daniel Fujiwara presentation to Climate Creatives 2022. <https://www.bbc.co.uk/academy/events/climate-creatives-2022/are-we-making-a-difference/>

³⁴ Inspired behaviour from watching *Wild Isles* includes more time spent in greenspace/parks and increased likelihood to plant plants compared to non-viewers, using HMT Green Book method to calculate value for each behaviour per viewer and total value delivered to wider society from self-reported wellbeing impacts.

³⁵ SIMTRICA-Jacobs (2023), Wild Isles Social Impact Report. Report commissioned by BBC Sustainability.

³⁶ *Ibid*

³⁷ SIMTRICA-Jacobs (2023), Wild Isles Social Impact Report. Report commissioned by BBC Sustainability.

³⁸ Estimates based on survey respondents willingness to pay amongst viewers and non-viewers of *The Green Planet* and *Wild Isles*, applied across UK population. This is a commonly used valuation method, recommended in HMT Green Book to estimate the values of goods and services.



BBC and Silverback Films and Alex Board

“Wild Isles inspired the public to get outside – we saw a 15% year on year increase in visitors to our nature reserves during and after the series. The Wild Isles puffin story also played a crucial role in helping us have more informed conversations with policy makers about the decline in Sandeel populations. Since the broadcast, both the UK and Scottish Government have announced a permanent closure of industrial Sandeel fishing from the North Sea and all Scottish waters: the most impactful immediate action any Government could have made to help our declining seabird populations. Through their storytelling the incredible natural history teams in Bristol have the power to help tackle some of the greatest challenges facing our planet”

Alex Try, Director of Communications, Royal Society for the Protection of Birds³⁹

Natural history producers and conservationists have for a long time recognised the value of filmmaking as a way to communicate issues to audiences and policymakers. For instance, in 2020, Silverback Films launched Studio Silverback, a new dedicated production unit with the mission “to use the power of film-making and story-telling to reveal the urgent truth of our changing planet to a global audience” and is majority supported by private and individual funds.⁴⁰ Filmmaking can build awareness and build evidence base to influence policymaker and industry. For example, Dr Wendy Darke noted the impact of True To Nature’s *Expedition with Steve Backshall* series (for UKTV, 2019) in highlighting the threat from industrial mining to the breeding corridor of Kyrgyzstan’s snow leopards.

“[The Deputy Minister for the Environment, for Kyrgyzstan] was able to use this film to lobby the government not to give permission for a potential gold mine being built so that the endangered snow leopard population, at least for the moment, could keep using their crucial breeding corridors between the north and southern population. That’s a really good example of premium content with purpose, that changes the world to be a better place for nature.”

Dr Wendy Darke, CEO and Founder at True to Nature

³⁹ Quote provided to the BBC for purposes of this report.

⁴⁰ More information on Studio Silverback available on the website: <https://silverbackfilms.tv/studio-silverback/>

4 INNOVATION AND R&D IMPACT

“Innovation is absolutely crucial to driving global prominence, and the BBC [Public Service] is the world leader, both in terms of children’s natural history and mainstream premium nature content.”

Dr Wendy Darke, CEO and Founder at True to Nature and former Head of the NHU (2012-16)

4.1 Competition driving creative innovation

Competition amongst natural history producers – both indies and the NHU – has spurred creative innovation, primarily in how natural history content appears on screen.

The majority of Bristol's natural history indies established within the last 15 years were start-ups led by former NHU staff. These include Alastair Fothergill and Keith Scholey who co-founded Silverback Films in 2012, Stephen Dunleavy who set up Humble Bee Films in 2009, and Dr Wendy Darke who set up True to Nature in 2016.

These start-ups have brought new ideas and entrepreneurial innovation to and create a competitive, creative market encouraging wildlife filmmakers to adopt new technologies and respond with new and more productive ways of working or else risk losing commissions and possibly exiting the market.⁴¹

“When working in the smaller budget range, you need to be flexible, to think outside the box and find more commercially-minded ways of solving a problem or telling a story. So I think that this is an advantage for smaller more agile companies in a landscape of smaller (in relative terms) budgets.”

Andrew Zikking, Managing Director Production at Off The Fence Productions



⁴¹ Again noting that the retrenchment of commissioning budgets discussed in Section 3 has had difficult repercussions on several of Bristol's unscripted indies and has resulted in the recent market exit of some.

Innovation and a competitive market have resulted in natural history indies specialising in their own niche. These differentiated offers range from traditional blue-chip documentaries to presenter-led programmes, or Children's natural history programmes to broadcast inserts that incorporate natural history into broad appeal factual entertainment shows such as *The One Show* to short-form content for more online, YouTube centric viewing.

Creative innovation in natural history has also come from bringing together top-talent from different genres and disciplines. For example, *Blue Planet Live* (BBC One, March 2019) brought together production crews from natural history, live events and factual entertainment backgrounds to deliver marine life filming in an exciting new format over one week in March 2019. Knowledge spillovers from different genre disciplines and/or different production companies create opportunities for new ideas.

"Interesting things happen from connectivity between genres... there's a very interesting area, which is what we call 'wildlife plus', which is specifically where natural history meets factual entertainment."

Grant Mansfield, CEO and Founder of Plimsoll

"I consciously work with people who are at the top of their game in other sectors to bring in new skills and perspectives, whether they're drama writers or working in science – that's how you get creative innovation..."

Dr Wendy Darke, CEO and Founder at True to Nature

4.2 Technological innovation in BBC Studios NHU

The enduring appeal of natural history depends on technical innovation to capture previously unseen wildlife behaviour. Whilst technological innovation occurs across the sector, this section highlights the work of the NHU. The NHU has a long history of pushing boundaries, from being the first documentary to capture in HD⁴² to being one of the first to use innovative motion control timelapse photography.⁴³

Within the NHU, R&D activity is heavily production focused but led by its central NHU Innovation team. This enables NHU productions to move quickly from design and prototyping kit, to then invest in testing and commission modifications, to then build and scale up quickly. This central coordination allows technical solutions to be shared amongst productions. The NHU Innovation team also manages the NHU's relationship with external partners, from key camera manufacturers to other R&D teams, offering central expertise on market developments and best practice. This results in the impact of the NHU innovation being supercharged across the Unit and de-risks R&D activity for individual productions.



⁴² *Planet Earth* was the first HD documentary, broadcast May 2006 on the then BBC One HD channel.

⁴³ Using state of the art motion control kit whilst filming in 2019 for *The Green Planet* to dynamically reveal the growth and behaviour of plants in multi-axis moves that had not previously been possible.

Most recently, BBC Studios NHU Innovation has developed novel resolution animal camera tags for marine animals for *Mammals* (currently broadcasting on BBC One and BBC iPlayer). Filming large underwater mammals is challenging as human divers are unable to get to the depths and stay close to the animals. The animal camera tags allowed the team to capture “on board” footage and observe unique wildlife behaviour in false killer whales that would not be possible to film. BBC Studios NHU worked in partnership with the Far Out Ocean Research Collective based in New Zealand, UK-based camera designer Marcus Shirley with buoyancy and tag holders designed by Portuguese-firm CEiiA to design solutions suitable for underwater filming that is light and dynamic enough for the animal whilst also being able to capture TV-quality footage.

BBC Studios NHU has also adopted techniques and technologies from the wider screen industry and developing new technologies, innovatively applying these to natural history filming.

“Could we do *Planet Earth* but for plants? The only way you could do that is with technological advancement. A whole new camera system was the key to being able to shoot *The Green Planet* in the way that was immersive because, traditionally time lapse sets the cameras in a position, and then you have to pick the camera up, and put it somewhere else. It’s very static.

Whereas what you need to be able to do is pick up the camera, run around while it’s recording, and the only way you can do that is to have hyper-accurate robotic cameras that can register their position, and return exactly to those positions so you get lots of different perspectives whilst running a time lapse. What we developed to accomplish that completely transformed how you see the world of plants.”

Mike Gunton, Creative Director at BBC Studios NHU

The sector’s independent producers have also contributed to technical innovation and R&D. Indeed junior engineers and camera operators from NHU and others have set up their own independent innovation labs in Bristol supplying specialist kit for wildlife filming. For example, Chris Watts from Technical Films and Marcus Shirley from Mr ROV, were both instrumental in developing small cameras used in on-board animal tags when shooting *Animals with Cameras*.

The impact of the NHU’s technical innovation is internationally recognised, both for its value to industry and in the content delivered to audiences. In November 2023, the NHU Innovation team was awarded Special Recognition prize at the Broadcast Tech Innovation Awards 2023 for their continued contribution to technical innovation that has revolutionised natural history filming for the industry and delivered world-class content to audiences.⁴⁴

There is also a long-standing and fruitful collaboration with BBC Public Service’s R&D team. The NHU initially challenged the public service R&D teams to use their computer visions skills to help enhance the production of *The Watches* (i.e. *Springwatch* and *Winterwatch*) on TV and digital outputs. This has led to a number of useful tools that have wider use across TV output. *The Watches* provide an excellent real world testing ground for ideas both from Public Service R&D and also from the BBC Studio NHU production team.



BBC Studios and Helen Hobin

4.3 Spillovers into scientific research & teaching

Natural history filmmaking has for many years relied on advice and support from academics and scientists studying the natural world, as well as biologists and other science graduates that bring their specialist knowledge into the production workforce. The NHU has partnered with leading species specialists across the globe as well as in-country researchers and conservationists. Located in the same city, the NHU has particularly close ties with academics and students at the University of Bristol. This ranges from informal ideas sharing to formal partnerships and academic advisory.

“There’s always been an informal collaboration between the University of Bristol and the Natural History Unit... With growing recognition that scientists can’t just be used as a free resource, a mission for me and the people I work with within the Bristol ecosystem is to create ways to strengthen – sometimes formally strengthen – but often just optimise the relationship between science and filmmakers. Done right, there are so many win-wins.”

Prof. Steve Simpson, University of Bristol

⁴⁴ <https://www.broadcasttechawards.co.uk/winners-2023>

The benefit of this collaboration is three-fold. First, scientists benefit from technical spillovers when production equipment and technologies provide new ways to study wildlife, as well as a wealth of wild behaviour captured on film that can help in the discovery of new science. Second, this collaboration helps raise public consciousness by providing a platform to highlight the work of the scientific community and its implications. Third, filmmakers benefit from new research that offers new ideas for natural history storytelling and researchers can also corroborate whether wildlife behaviour footage is typical or unusual for that species.

Prof. Steve Simpson, Professor of Marine Biology & Global Change at the University of Bristol, was an academic advisor on *Blue Planet II* (aired BBC One, 2017). Working with the NHU whilst filming coral reef sequences in Malaysian Borneo introduced him and his research team to a new multi-directional hydrophone recording system designed to capture underwater acoustics for film.

“[The NHU production team] found some fairly revolutionary equipment... It opened up an entirely new research field for me and my team because the idea of the kit we were using was initially just to collect better surround sound for the series. But actually meant we started listening to individual fish sounds and starting to unpick communication in fish... Now, we've got researchers around the world using multi-directional hydrophone systems to look at how fish and other animals communicate but also looking as different aspects of noise pollution.”

Prof. Steve Simpson, University of Bristol

A recent example of scientific discovery comes from the Asia series due to air later in the year on BBC One and BBC iPlayer. Footage showed a firefly squid bioluminescing (when a living organism produces and emits light) in different colours, an observation that challenged previous scientific thought that squid were monochromatic (colourblind). The University of Bristol connected the NHU with a postgraduate student who studied BBC Studios NHU's footage and led to a new scientific discovery. He is continuing the partnership with BBC Studios NHU into further study in his PhD. The University has informal connections with many other wildlife filmmaking production companies in Bristol, which has introduced companies to students and graduates from logging rushes (raw footage) for the production to providing real-time scientific advice to the crew when filming on location.



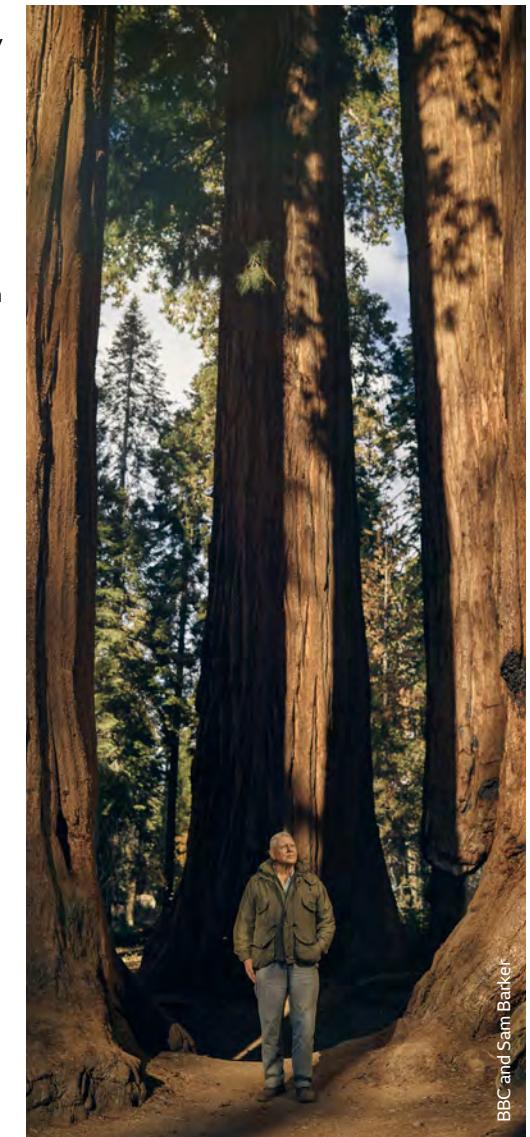
BBC and Silverback Films and Alex Board

More recently, the NHU has been working to formalise its scientific collaboration and is currently piloting this with the University of Bristol. The NHU aims to (1) provide support to researchers and institutions to access remote and difficult locations and subject matters by leveraging the NHU's reputation and experience, and (2) to collaborate with institutions to present research questions which can contribute to both BBC Studios productions and the wider scientific community. In practice, the latter formalises existing collaboration with MSc and PhD students with the NHU, building a framework for production objectives to shape academic research.

“The other thing that has developed quite quickly is a two-way exchange... between the production teams [from NHU and other production houses] and our students, other collaborators and researchers. The evidence that underpins statements in narration is getting stronger, and by having our students analysing rushes from a shoot, we can turn what has to be a very cautiously built narrative based on anecdote into something that is really based on hard data and new scientific discovery.”

Prof. Steve Simpson, University of Bristol

As shown in the Section 3.2, landmark series have been significant in raising public awareness of life sciences and environmental issues, and this includes attracting university students into life sciences (discussed further in Section 5.3).



BBC and Sam Barker

5 BRISTOL PRODUCTION WORKFORCE

5.1 Employment in Bristol's screen sector

The BBC plays a key role in the talent pipeline as Bristol's creative anchor and is the largest employer, accounting for 45% of the production community in 2022.⁴⁵

The BBC's Bristol workforce includes those working as part of BBC Studios production, based at the new Bridgewater House in the centre of the city and Public Service staff working in audio production and local news services based at Broadcasting House on Whiteladies Road.

"Although the BBC is a competitor, I think a strong BBC is really important for the city. If we can make the city an attractive place for bright young people to build a creative career, then the independent sector will flourish.

It's great that there are lots of small and independent production companies in the city, [that] make an important contribution but what the city needs more than anything else is some more companies of scale [such as BBC and Plimsoll]"

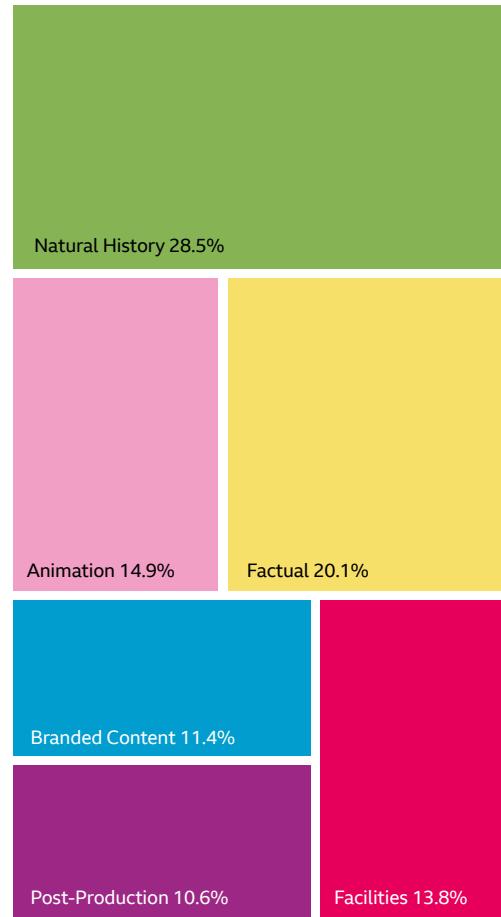
Grant Mansfield, CEO and Founder at Plimsoll



⁴⁵ Spicer, A., Presence, S., & Frymus, A. (2022).

The rapid expansion of commissioning from Bristol has seen its workforce grow to an estimated 2,760 FTE staff working for the BBC or independent producers and a further 1,950 to 2,500 freelancers.⁴⁶ This is an increase of 24.45% since 2017,⁴⁷ when the sector employed 2,220 FTE staff and 1,500 freelance workers.

The success of natural history and factual production from BBC Studios and independent productions means that they are the largest subsectors in the city, with 28.5% FTE employed in natural history production and 20.1% employed in factual (including factual entertainment).



Source: Spicer et al (2023), *Go West!* 2



⁴⁶ Estimated range based on uplift in FTE production staff and other industry estimates suggesting that freelancers comprise up to 90% of the production workforce.

⁴⁷ Growth rate is based on increase in FTE production staff working for BBC and independent sector. Does not include freelancers. Source: Spicer, A., Presence, S., & Frymus, A. (2022).

The growth in Bristol's production sector has also created growth and employment opportunities in post-production and other sectors that support the screen industries. Facilities and post-production accounted for almost 15% of production sector employment in 2022. Bristol's emergent drama subsector, which employs less than 1% FTE roles, is expected to grow significantly in coming years.⁴⁸ Growth in the drama subsector, which unlike natural history production requires more in-studio filming and less on-location, is likely to lead to more demand for facilities and facilities' staff. (Further discussed in Section 6.)



The city's natural history specialism attracts many professionals that want to work in wildlife filmmaking. Editorial roles in natural history can be highly specialised, requiring an academic knowledge that's required to work alongside scientists and understanding the wildlife and habitats subject to the film.

"A wildlife film producer is a very different beast [to other genres]. They need those skills... to know how close you can get to an elephant... a history producer would just get trampled. So it's a very different skill [set]."

Alastair Fothergill, Executive Director at Silverback Films and former Head of the NHU (1992-98)

"In natural history we dive deep into wildlife behaviour. People need to have an in-depth knowledge of animal behaviour from practical experience in the field, higher education, or both. Bristol has become a hub for natural history and people move between BBC Studios and the Indies".

Anna McGill, Line Producer – The Americas at BBC Studios Natural History Unit

The BBC's established network presence in Bristol has attracted mid-level and senior professionals over many years. BBC Studios units specialising in both natural history and factual entertainment in Bristol has offered those in unscripted production management roles in-house, to build transferrable skills and progress their careers by working across different genres without leaving the region.



"The Natural History Unit and [BBC Studios Factual Entertainment Productions] have a close relationship, this enables individuals to pursue opportunities in both departments... This is facilitated by the regional talent teams who look after production management [in BBC Studios]. In my role, when recruiting for production management assistants, I often speak to candidates who have worked in both genres, or who have worked in one genre and are looking to make the move to the other, to expand their skills. I personally have moved between departments throughout my career and there were few barriers"

Rebecca Candy, Production Manager – Antiques Roadshow at BBC Studios Factual Entertainment Productions Bristol

The scale offered by BBC Studios, large indies Plimsoll and Silverback, and the breadth of independent producers in the city offers more stable careers and development opportunities to production talent without needing to move to London. Compared to other creative clusters, Bristol also benefits from its relative proximity and strong transport links to London where a large number of UK commissioners are based. Bristol's production workforce also benefits from proximity to and opportunities in Cardiff, which also has a very strong drama production sector and established factual entertainment sector.

"If you want to persuade new talent to stay, and crucially invite established talent to come in to what is predominantly a freelance culture. They need to... know that there are a number of companies [of] a significant size. So if the contract comes to an end, and you've moved your family now, and say you can move from the BBC to Plimsoll... One of the things that I'm really proud of is that it's made Bristol a safer place for people to relocate to"

Grant Mansfield, CEO and Founder at Plimsoll



BBC Studios and Tom Parry

5.2 Career development and training in BBC Studios

BBC Studios offers training which range from apprenticeship and trainee and graduate schemes for early career roles, to continuing career development for mid-level and senior roles and includes specific schemes to improve opportunities for under-represented groups.

“The BBC provides a huge range of world class online and face-to-face training, giving a thorough grounding in all aspects of production and the skills needed to progress in your career. There is valuable in-house knowledge from the teams themselves and their experience that you can draw on including master classes that are run internally, and both informal and formal mentoring. The BBC also offers great benefits such as flexible working, pension, and wellbeing support.”

Anna McGill, Line Producer – The Americas at BBC Studios Natural History Unit

“I applied for a 12 month leadership programme... the Rise scheme was for black and ethnic minority staff, who were looking to take the next step up in their careers. The scheme focused on empowering individuals to reach their potential, advocate for themselves in the workplace, learn leadership skills and identify next steps in their development. I think that [the Rise scheme] was really useful in getting me to the position I’m currently in.”

Rebecca Candy, Production Manager – Antiques Roadshow at BBC Studios Fact-Ent Productions Bristol

Internal training and career development

The BBC Academy manages all BBC Studios' apprenticeships, providing formal training to an apprentice cohort alongside the formal education provider. In Bristol, there are currently 10 Early Career apprentices working for BBC Studios NHU and a further three based in BBC Studios Factual Entertainment Production's Bristol division.

BBC Studios NHU also benefits from wider BBC schemes such as BBC Studio Productions' Assistant Producer Accelerator Programme and the Production Co-ordinator Accelerator Programme. The Programmes offer a one-year contract to work within BBC Studios' production, and provides bespoke training to develop practical content-making skills as well as learning about areas such as leadership, team management and mental health awareness.⁴⁹ The Production Co-ordinator Accelerator Programme is specifically aimed at bringing talent in to the sector taking individuals in non-TV production roles but who have transferrable soft skills and co-ordinating experience.

This is further supported by a shared training coordinator who highlights upcoming training available to all those based at Bridgewater House. Informal events and masterclasses are open to all staff and freelancers working on-site, which allow best practice and knowledge sharing to be shared amongst different roles and across genres.

Working with external organisations

BBC Studios work closely with a range of external organisations to provide access and development opportunities to entrants and professionals already working in the sector. The NHU has supported third-party organisations in numerous ways, including:

- Providing two work experience placements on production through Boomsatsuma in 2023.
- Supporting 22 Creative Access paid interns since 2016, many of whom continue to work for the NHU. Creative Access is a social enterprise that provides recruitment, training and support to people from under-represented groups at all career stages.
- Providing two placements each year since 2022 as part of the Grieson DocLab training programme which is aimed at UK-based new entrants, aged 18-25, in factual TV and documentary filmmaking.

BBC Studios Factual Entertainment has a long history of outreach work with schools and colleges in Bristol. Other initiatives focus on mentoring, networking and hosting events, including:

- Bristol City Council's *Stepping Up* initiative, which supports under-represented groups to rise through management.
- *Countryfile* organised a day long scriptwriting and filming masterclasses for students on the Mama Youth Project, which recruits and trains young people from underrepresented groups or with limited educational or employment opportunities.



External events

External events at Bridgewater House have formed a key part of BBC Studios' engagement and outreach with Bristol's screen industry and wider community. Recent events have included BBC Studios hosting:

- A Creative Access showcase event on the opportunities available in the creative industries in Bristol;
- A 'fact-finding' event for WECA bringing together representatives of the creative industries to look at a new grant scheme and ways of supporting industry freelancers;
- Several careers fairs at Bridgewater House, including open invitation events as well as career fairs organised exclusively for local media-focused colleges and universities such as Boomsatsuma, City of Bristol College and UWE Bristol.

NHU staff have also participated in careers talks at UWE Bristol and University of Bristol. The BBC Studios Factual Entertainment production outreach team have attended Bristol City Council job fairs, including women's return-to-work and disabled focused events. BBC Studios have also worked with Bristol Light Festival and Wildscreen on events open to members of the public.

- Inviting students from UWE Bristol and Boomsatsuma for specific Production Management focused events and to visit productions on location. This included inviting 30 Boomsatsuma students to 'D/Y SOS' when the show was filming in Bristol. Both the production team and presenter Nick Knowles spent time with the students throughout the day to explain how they make this incredibly complicated and ambitious programme.
- Supporting RTS West by both judge and present awards for the RTS West Student Awards. BBC Studios is also a long-term sponsor of the RTS West Flying Futures Award and is privileged to help support the next generation of film making talent in Bristol and the West.

Both BBC Studios' units work closely with local education providers to support young people to acquire skills and enter the industry. For example, BBC Studios' staff have delivered standalone training in Production Management and Scripting and students at UWE Bristol and Biotrauma have been invited to BBC events, such as 'Dyslexia in TV' and 'Production Unlocked'.

⁴⁹ More information: <https://www.televisual.com/news/bbc-studios-launches-third-ap-accelerator-programme/>

**CASE STUDY**

MARCOS CHAVES RODRIGUES

Marcos Chaves Rodrigues, completed a Production Assistant apprenticeship at the NHU.

Marcos is currently an edit assistant in the NHU. He joined the NHU initially for 18 months as an early-careers apprentice in Production Assistant (Level 3) following his A-levels.

"The training that we received through the BBC was very constructive and educate us about various roles across the industry. I gained even more knowledge and experiences working on my placement on *Planet Earth III* as an edit assistant."

Through the apprenticeship, Marcos worked in various roles: in editorial, gaining research experience including archive research, and supporting teams working on-location in the Amazon. The apprenticeship has also provided transferrable skills, which open opportunities to work in other genres in future.

"Since I work in the technical side of post-production, our understanding of editing software can be used in all genres with different workflows.



Marcos Chaves Rodrigues

Although there is a difference between the work we do here in natural history, compared to live [broadcast]."

The BBC apprenticeship also includes freelancer training which aims to support apprentices if they become self-employed freelancers in future. Next career steps after edit assistant can include becoming a junior editor, entering a more creative role, or to becoming a post-production lead, a specialised technical support and project management role.

"I feel very lucky to be working in the Natural History Unit as it's something I've always wanted to do. When I moved from Brazil to the UK, I was not expecting to have any of these opportunities. So, I'm very glad the BBC provides these apprenticeship schemes for people without a background in the media industry".



BBC and Nick Green



Q CASE STUDY LAUREN JACKSON

Lauren Jackson, joined the BBC Studios NHU as part of a Creative Access placement

Lauren Jackson has been an assistant producer and field director since 2021 on *Kingdom*, a long-form blue-chip production that documents character-led wildlife stories due to broadcast in 2025. Lauren's previously worked on other NHU landmarks including *Eden: Untamed Planet*, and *Seven Worlds: One Planet* as well as working in Live, Development and Children's Natural History departments.

Lauren joined the BBC on a 12-month Creative Access placement, which aims to provide greater access and bring in more people from diverse ethnic and socioeconomic backgrounds into the screen industry. Lauren joined the NHU as part of a cohort of five individuals.

"It was a highly competitive scheme with fantastic support and training. Creative Access held workshops and seminars, and the BBC facilitated technical training sessions. Consequently, I attained skills in storytelling, camera techniques and personal skills such as networking and CV building. All those things give you the edge to keep your role in a competitive industry. Most people tend to be on fixed term



Lauren Jackson

agreements within BBC NHU, so bridging contracts can be an incredibly daunting task. I felt well equipped with the skills to prepare for those moments."

The BBC was a key entry point into natural history production sector for zoology graduate Lauren. She had previously applied for work experience before being successful in the Creative Access placement, and found the adverts for entry-level roles with independent production companies to be less specific about the skills and experience required. The BBC contract length was also considered to offer more stability and financial security, which was welcome when starting out in the sector.

"I didn't know enough about the indie sector to truly understand what I would be applying for, whereas BBC made it very clear which roles were entry level versus which were outside my skill and experience levels. Given that I was also making a big move to a new city, with associated financial pressures, the job security offered by BBC was much more appealing than the shorter fixed-term contracts offered by indies."

PROJECT SONGBIRD: DEVELOPING INTERNATIONAL TALENT

Project Songbird – BBC Studios NHU's international outreach & talent initiative

In October 2022 the NHU announced Project Songbird, a new talent initiative that will invest £1m over three years to develop and support aspiring natural history filmmakers in the UK and around the world.⁵⁰ The initiative is part of the NHU's ongoing commitment to nurture, attract and diversify new production talent to create a more sustainable, equitable and inclusive wildlife filmmaking industry. A key way it aims to do this is by fostering the development of local production talent, reducing the need to fly crews around the world.

Project Songbird funds opportunities for local production talent where the NHU is filming overseas, offering field experience working with NHU teams on location, and investing in local talent to attend UK-based training courses. In its first year, the initiative supported 14 participants from 10 countries including the UK, France, Kenya, Zambia, Madagascar, Mozambique, Tanzania, Indonesia, Pakistan and Laos. Of these recipients, the 11 who have now completed their Project Songbird training (100%) believe it has created greater work opportunities within the industry, with 80% of these gaining further

or continued work within the Natural History Unit after completing Songbird training.⁵¹

"Our vision is to build an equitable, diverse, and sustainable filmmaking industry for the future. To achieve that, Project Songbird is helping to attract, train and support filmmaking talent in locations where we film around the world.

*Dr Jonny Keeling, Head of BBC Studios NHU
Quote provided for purposes of this report*

Project Songbird training support includes in-country and UK-based training, camera bursaries, and fully-funded scholarships for the BBC-accredited MA in Wildlife Filmmaking at UWE Bristol. The BBC scholarship covers full academic course fees plus additional expenses including student accommodation in Bristol city centre, a UK living allowance and travel costs⁵² with UWE Bristol providing pastoral support such as help with the visa application process. Scholars Pauline Kyalo and Thige Jeffrey Njuguna joined the 2023/24 MA Wildlife Filmmaking course and applications for a fully-funded scholarship for the 2024/25 academic year are currently open to a student from Indonesia or Malaysia.

Project Songbird also funds local language versions of NHU productions and hosts in-country screenings for the local communities who may otherwise not see natural history content supported by and relevant to their community. This includes *The Rise and Fall of the Marsh Pride* (BBC Two, 2022) which was translated into Swahili and shared with local Mara communities, a local Lao translation and screening of *Bears About The House* (BBC Two, 2020), and *Mexico: Earth's Festival of Life* (BBC Two, 2017) screened in Chiapas, Mexico with Spanish translation.

Through Project Songbird, the NHU has also partnered with Wildscreen to deliver wildlife filmmaking events overseas. Over 200 African filmmakers from 12 countries attended *Wildscreen Nairobi 2023*, a two-day wildlife filmmaking event hosted in Nairobi in July 2023, to network and attend industry panels and masterclasses. 92% of attendees said they came for networking opportunities, and 79% reported generating new business from attending.⁵³ Building on this success, the NHU are again partnering with Wildscreen and Tanzania-based non-profit AFRISOS to host Wildscreen Festival Tanzania on 6 and 7 June 2024.⁵⁴



⁵⁰ <https://www.bbc.co.uk/mediacentre/bbcstudios/2022/bbc-studios-natural-history-unit-announces-1-million-global-talent-development-initiative>

⁵¹ Statistics provided by BBC Studios NHU.

⁵² <https://www.bbc.co.uk/mediacentre/bbcstudios/2023/bbc-studios-productions-launch-international-wildlife-filmmaking-scholarships-at-uwe-bristol>

⁵³ WildScreen Festival Nairobi Sponsor Report (2023).

⁵⁴ More information on Wildscreen Festival Tanzania 2024: <https://wildscreen.org/tanzania/>

5.3 Pipeline from Bristol universities

The NHU's most significant skills partnership has been the BBC Studios NHU-accredited MA in Wildlife Filmmaking, co-designed and delivered by UWE Bristol. The MA cohort visit and experience the Unit. Staff from the NHU and several of the indies are involved, providing everything from classroom support through to mentoring. Head of the NHU, Dr Jonny Keeling is a Visiting Professor at UWE Bristol. The course has grown and now includes not only sessions taught by NHU staff but by leaders from independent production companies too.

Places on the course are competitive, with around 17 places available on the course each year. As part of the course, UWE Bristol hosts a student end-of-year film screening which provides a platform for students to showcase their work to industry professionals with a view to securing employment opportunities. Now in its twelfth year, the course has a high success rate with around 94% of graduates finding employment each year.⁵⁵ Around 32% of graduates from 2016 to 2023 went to work for BBC Studios NHU or another part of the BBC after graduating.⁵⁶

“The link is so strong with the course that industry professionals go to the course leader for advice on where graduates are currently working. A lot of graduates stay in Bristol, because that's the global centre [of wildlife filmmaking]. If you want to come and study natural history, you come to Bristol. If you want the best opportunities with the densest cluster of successful indies, stay in Bristol.”

Lynn Barlow Assistant Vice-Chancellor Creative and Cultural Industries Engagement, UWE Bristol.

“It's a brilliant course and the graduates they turn out are really well rounded. It's just a great applied course.”

Alex Williamson, Founder and Creative Director of Offspring Films

The NHU also provides a limited number of fully funded scholarships for international students undertaking the MA as part of BBC Studios NHU's Project Songbird (see case study above).

UWE Bristol also works closely with the indies to provide student opportunities from across the sector to support the talent pool needs; including weekly meet-the-industry sessions and has organised and hosted two sector wide Screen Summits (November 22/23) to bring the sector together to build strategic growth and leverage inward investment opportunities.



BBC Studios and Clement Kiragu

UWE Bristol has similar partnerships with Plimsoll Productions. Its CEO Grant Mansfield holds a Visiting Professorship and is a member of UWE, Bristol's Board of Governors.

“Part of my job is to say to students doing media courses [at UWE Bristol], you don't have to graduate and then instantly head to London. There are options in Bristol. There's the BBC. There's Plimsoll – we are by far the biggest indie – but there are lots of other very good indies in the city”

Grant Mansfield, CEO and Founder at Plimsoll

The NHU also has a close relationship with science faculties at the University of Bristol, discussed in Section 4.3. Natural history content is used to support technical teaching as well as influencing course design. For example, third year undergraduate modules include 'Blue Planet' (marine biology) and 'The Future of the Green Planet' (terrestrial ecology), both named after the BBC's landmark series.

The University of Bristol's geographical proximity to 'Green Hollywood' has also seen media-skills be introduced as part of the course offer, providing students with skills to translate academic research to a wider audience. These courses complement the practice-focused courses offered by UWE Bristol. Undergraduate students have the option to study a wildlife filmmaking field course (a single module) in their second year, and a new course MSc Science Communication for a Better Planet was launched for 2023/24, which brings together world-leading experts from biological sciences and communications fields.⁵⁷ Students are training on a wide range of science communication techniques – including radio broadcast, podcast creation, print journalism, policy briefing, social media content creation and filmmaking – to understand the importance of messaging in order to build public trust and encourage political engagement to tackle the global climate and biodiversity crises.

Other formal education providers – namely Boomsatsuma and ScreenSkills – have similar partnerships with both the BBC and the independent sector.

⁵⁵ Figures provided by UWE Bristol. Mode employment rate is 94% after graduation, ranging between 93% and 100% between 2014 and 2022.

⁵⁶ BBC analysis of data provided by UWE Bristol.

⁵⁷ For further details: https://www.bristol.ac.uk/study/postgraduate/taught/msc-science-communication-for-a-better-planet/?utm_source=google&utm_medium=cpc&utm_campaign=pg24_msc&utm_id=UOB075&utm_content=ls_msc-science-communication&gad_source=1

5.4 Sector skills and career development in Bristol

There's broad commitment from all stakeholders in Bristol to talent and skills development and to improving diversity and opportunities for local talent to join Bristol's production sector.

"I'm a real advocate of bringing new talent in, so I do take risks with new talent, because I know how to support them with the experience my team and I have whilst giving them the creative space to develop their own style and voice."

Dr Wendy Darke, CEO and Founder at True to Nature



BBC and Studio Lambert Media Ltd and Jonathan Birch and Russell Kirby

It is also important to recognise the substantial training investments made by independent production companies. Some stakeholders interviewed as part of the BBC's research indicated that some parts of the independent sector offered less formal but more on-the-job training compared to the BBC. However, there are also many examples of skills investment by indies. These include internal masterclasses, industry events such as Silverback's annual event for camera women working across the natural history sector. Plimsoll works with a number of industry partners to support entry level internships and work placements,⁵⁸ offering 22 total placements (144 days) in 2023 in addition to its hugely successful (runner) trainee programme.

ScreenSkills and Gritty Talent are two other notable organisations supporting Bristol's production sector workforce and the challenges they face.

"If you're in-house, you should be able to access some ongoing training and support, or at least have some career advice or support, whereas obviously freelance, you don't have any of those assets... that's the whole point of the fund is to be an absolute complement to [in-house training]."

Kaye Elliot, Director of HETV at ScreenSkills



BBC and Cherie Pohl

ScreenSkills' High-end TV Skills Fund supports training programmes for new entrants and continued professional development primarily in the scripted genre but also other high-end genres (including natural history). The High-end TV Skills Fund provides a broad range of training (including mental health, supporting wellbeing for crew and talent) and bursaries to access training, supporting entry-level talent through 'Trainee finder' (this scheme, which is 15 years old, pays for trainee placement on productions), to 'Make A Move' which enables productions to move freelancers up into more senior roles, to 'Leaders of Tomorrow' (a 3-year inclusion focused programme that supports individuals in mid-level roles into senior and leadership roles through career mentoring, training and on the job placements).

"The high-end TV skills fund is made up of industry contributions managed by ScreenSkills on behalf of industry... when a production contributes into the high end TV skills fund, they can take out 60% of what they pay in directly back into their production to support their freelance crew. This could be anything from trainees on our programme called Trainee Finder, which has been running for over 15 years, right through to people who are stepping up to be co-producers and everything in between."

Nicky Ball, HETV Head of Mid-Career progression ScreenSkills

⁵⁸ Examples of Plimsoll's partners include Wildscreen Internship scheme, National Film and Television School, The Grierson Trust DocLab Scheme and Channel 4 4Skills Production Trainee scheme amongst others.

ScreenSkills also manages an Unscripted TV Skills Fund which provides support to (non-HETV qualifying) unscripted productions including factual, factual entertainment, entertainment, sport, lifestyle and daytime content. Similar to the HETV Fund, the Unscripted Fund provides a range of training programmes to support career progression. It also offers a wide-range of free online training courses for staff and freelancers working in unscripted. The other Skills Funds for Animation, Children's (live-action) TV, and Film also work with industry representatives in their sectors, to support the development of talent in Bristol.

ScreenSkills also has an Unscripted Fund which provides support to mid-range unscripted production such as some factual entertainment lifestyle and daytime content. This is primarily an online training offer that productions can use to support freelance and other crew.

Bristol-based Gritty Talent aims to create inclusive and accessible pathways for on-screen and off-screen talent by helping remove structural barriers that often prevent talent from launching and progressing their careers. (For example, accessing financial support for driving lessons to remove financial and transport barriers experienced by early stage freelancers.) Gritty Talent has worked with ScreenSkills as a delivery partner for career roadshows, which supported around 800 Key Stage 3 (aged 11-14) students to learn about the breadth of careers in Bristol's High-End TV sector, on the First Break scheme (aimed at pre-entrant inclusivity) and designed and delivered the Producer Pathways scheme (addressing career progression and skills gaps for unscripted producers) around the UK.

"Gritty Talent is a bit of a chameleon, because we do lots of different things, but the premise 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."

Mel Rodrigues, Founder and CEO at Gritty Talent

Gritty Talent has also worked with BBC Studios NHU through its Creative Residency Programme, which aims to place new on screen talent in different development teams on placement as well as BBC Studio talent and outreach teams as part of regular freelance events hosted at Bridgewater House.

In March 2024, the West of England Film & High-End TV Workforce Development Programme was announced to support workforce skills in Bristol and the surrounding region. The scheme aims to support 45 participants across three five-week training courses and supports pathways into future employment.

The scheme is funded by WECA and delivered by the Bristol City Council's Film Services (comprising The Bottle Yard Studios, Bristol UNESCO City of Film and the Bristol Film Office) and "will provide flexible grants to meet current priority skills gap. This project is part-funded by the UK Government through the UK Shared Prosperity Fund."⁵⁹ This is part of ongoing work by Bristol City Council's Film Services to further support development of the drama sector, especially as this has been identified as having lower barriers for new entrants, requiring less formal training or specialist knowledge.

"The beauty of [drama production] is that the young people coming [and entering the sector] don't have to have a degree or A-levels, or even GCSEs necessarily. [It offers] a lot of vocational career options for them whereas with natural history there's an element of academia required."

Laura Aviles, Head of Film at The Bottle Yard Studios.



⁵⁹ <https://www.thebottleyard.com/home/skills/west-of-england-film-high-end-tv-workforce-development-programme-2024/>

6 FUTURE OUTLOOK FOR BRISTOL'S PRODUCTION SECTOR

Much like the rest of the UK production sector, Bristol faces some immediate challenges due to the curtailment of international commissioning spend and wider economic conditions affecting the production sector workforce and businesses.

This has particularly impacted natural history, which has seen the recent closure of several indies and following the recent announcement of posts closing within the NHU, as noted in Section 3. However, many of the interviewees were optimistic about Bristol's long-term future and that natural history commissioning will return to more sustainable levels.

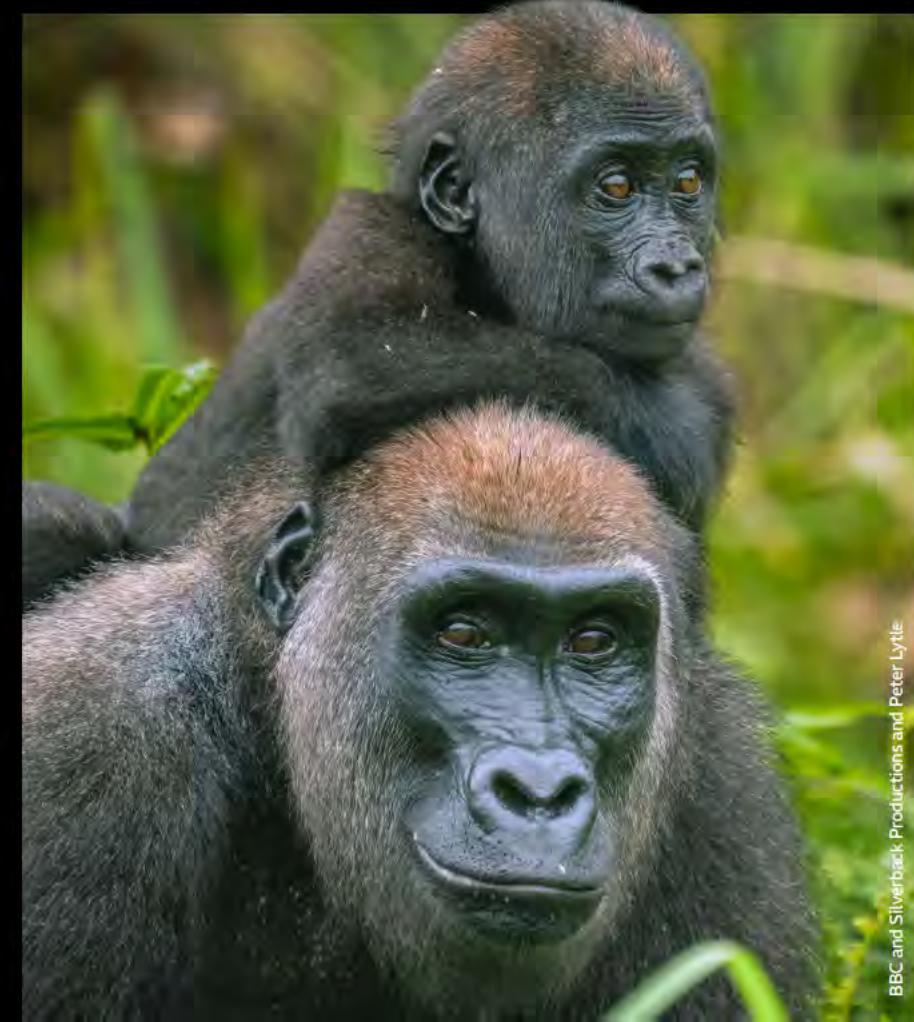
"We're facing a really tough time across the board right now. And that's challenging on multiple levels. It's challenging for freelancers. It's challenging for independent companies. It is also challenging for broadcasters. It's just there's less money around due to the downturn in advertising and that affects everyone badly."

Sacha Mirzoeff, Head of Hub (Bristol) at Channel 4

There remains plenty of opportunity across Bristol's screen industries. The city's successful bid to be home to Channel 4's Creative Hub brought organisations from across the region and sector to work together. This collaboration has continued with greater coordination between organisations to ensure that they are not replicating the work of others and are meeting the sector's needs. Channel 4 sees part of its role as helping tackle social mobility and diversity in Bristol's creative industries, a focus for the BBC and many others across the sector.

"We felt that we could build upon what was already a thriving cluster in Bristol, and that there was a vibrant, diverse talent pool to draw upon, and local partners who really shared our priorities and vision. Particularly around social mobility and improving representation within the industry. That was a big factor [in Bristol's bid for Channel 4 being successful]"

Briony Robinson, Senior External Affairs Manager at Channel 4



BBC and Silverback Productions and Peter Lytle



BBC and Studio Lambert Media Ltd

This furthers the continuing work of Gritty Talent, ScreenSkills and others to address industry access and diversity issues within Bristol's workforce and support freelance workforce (discussion in Section 4).

Momentum continues to build in the region's drama production sector after being a key focus on Bristol City Council's Film Services (comprising The Bottle Yard Studios, Bristol UNESCO City of Film and Bristol Film Office) for several years. This is reflected in the BBC's own output, with brand new coming-of-age comedy drama *Boarders* landing earlier this year. The Bottle Yard Studios have rightly earned their reputation for excellence and sustainability, and the Studios are close to fully booked for the coming year.

“From my perspective, it's onwards and upwards. Drama is growing exponentially in this region, and I think it will continue to do so. We just need to make sure our skills programs keep up so we have local crew to service it.”

Laura Aviles, Head of Film at The Bottle Yard Studios

The recent announcement of the West of England Film/High-End TV Workforce Development Programme (discussed in Section 2) invests in the skills that will be required in the region. Moreover WECA is exploring options for a regional production fund for the West of England. The strategic focus on scripted and non-scripted aims to bring more inward investment to Bristol and the West of England.

“The West of England Combined Authority is exploring the opportunity to deliver a regional production fund for the region to boost production across Bristol and Bath with a focus on regional representation on our screens, economic growth and talent development.”

Nona Hunter, Creative Industries Senior Project Manager, West of England Combined Authority (WECA)

High-end TV and film, which includes the majority of natural history content, has a huge economic impact in terms of employment and production spend into the local supply chain in Bristol. Bristol has a strong base in terms of natural history workforce and supply chain but the international nature can mean much of the production budget is spent overseas. Although drama production still represents a very small portion of the sector (less than 1% production revenues), by comparison, high-end drama shot in-studio and in location in and around Bristol and the South West may see relatively higher returns retained within the local economy. Diversifying the region's screen production sector may add further scale and resilience, particularly if there is more support to allow production workforce to transition between unscripted and scripted genres.

For the BBC and the NHU, there lies ahead more exciting programming from Bristol. This includes *Parenthood* from Silverback Films, *Tigers 24/7* from BBC Studios NHU and a new *Wallace and Gromit* adventure from Aardman coming this Christmas, alongside the regular and returning content produced by the BBC teams based there. The BBC continues to be committed to the city and wider region, ensuring that Bristol has the tools required to tell its story on both a national and global stage.

Annex I

We'd like to thank everyone that has supported and contributed to this research.

Industry stakeholders interviewed by economists in the BBC Public Policy team during primary research are listed below.

- Laura Aviles
Head of Film
The Bottle Yard Studios
- Nicky Ball
Head of HETV Mid-Career Progression
ScreenSkills
- Lynn Barlow
Assistant Vice-Chancellor Creative and Cultural Industries Engagement
University of the West of England, Bristol (UWE Bristol)
- Kevin Blacoe
Head of Partnerships and Skills
Channel 4
- Rebecca Candy
Production Manager – Antiques Roadshow
BBC Studios Fact-Ent Productions Bristol
- Marcos Chaves Rodrigues
Edit Assistant – HOME/CORE
BBC Studios Natural History Unit
- Dr Wendy Darke
CEO and Founder
True to Nature
- Kaye Elliot
Director of HETV
ScreenSkills
- Alastair Fothergill
Executive Director
Silverback Films
- Mike Gunton
Creative Director
BBC Studios NHU
- Nona Hunter
Creative Industries Senior Project Manager
West of England Combined Authority (WECA)
- Lauren Jackson
Assistant Producer – KINGDOM
BBC Studios Natural History Unit
- Grant Mansfield
CEO and Founder
Plimsoll Productions
- Anna McGill
Line Producer – The Americas
BBC Studios Natural History Unit
- Sacha Mirzoeff
Head of Hub (Bristol)
Channel 4
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Bristol UNESCO City of Film Manager
Bristol UNESCO City of Film
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Senior External Affairs Manager
Channel 4
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Professor of Marine Biology & Global Change
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Managing Director
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- Alex Williamson
Founder and Creative Director
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Royal Society for the Protection of Birds

