



Roundtable: Research and Policy Priorities for the Hidden Screen Industries

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On 8th July 2024, industry leaders Steve Davies and Steve Garvey met at the British Film Institute (BFI) to discuss research and policy issues with the PI and Co-I of the AHRC Hidden Screen Industries network (Emily Caston and Patrick Russell), along with Ian Cade of the BFI's Research and Statistics Unit. Topics covered included tax reliefs, screen skills, diversity and inclusion, the lack of research on advertising screen production and branded film, and priorities for future research.



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On 8th July 2024, industry leaders met at the British Film Institute (BFI) to discuss research and policy issues with the PI and Co-I of the AHRC Hidden Screen Industries network. The participants of this roundtable were: **Ian Cade (IC)** Research Manager at the British Film Institute Research & Statistics Unit (RSU); **Steve Davies (SD)**, CEO of the Advertising Producers' Association, VP of Commercial Film Producers of Europe and board member of the Advertising Association; **Steve Garvey (SG)**, CEO of research agency Moving Image which collaborates with trade publication *Telesvisual* to produce annual statistics on the branded film industry; **Patrick Russell (PR)** Head of Non-Fiction, British Film Institute National Archive; and **Professor Emily Caston (EC)**, Director of the Policy and Practice Research Institute of Screen and Music (PRISM), University of West London.

EC: Ian, can you give us an overview of the RSU at the BFI?

IC: The RSU was set up under the UK Film Council in 2001/2 in response to several parliamentary working groups which had recognised a lack of knowledge about the screen sectors, especially film in the UK, and had identified the need for a new and authoritative source of data on the sector. For its first ten years, the RSU operated under the UK Film Council. Most of its work centred on collecting and publishing official statistics in three areas: the first was film production in the UK, the second was the certification of films for tax relief purposes, and the third was official statistics on UK box office for films shown in the UK and Ireland. However, it did and does conduct some additional research, the most important of which is five yearly data on screen business, looking at the impact of tax certification.

When the RSU was moved from the UK Film Council into the BFI as a result of the 2010 coalition Government's decision to merge the two, the BFI took over this research remit. In 2013, the RSU's focus was expanded to high-end television which was defined as anything with a budget above £1 million per screen hour. We also started to look at children's television and animation. Videogames came on board as well when tax-relief was made available to the sector. We don't cover any television below £1 million per screen hour, such as standard broadcast television or live television or more mainstream weekday viewing. The only time we have covered television below that level was during the Covid Pandemic when there was a Government initiative called the Production Restart Scheme.

The RSU is funded directly by national lottery proceeds, not grant in aid, so we have a research council made up of people across the screen sectors. They identify key areas in which they think there is a research need. That helps us to identify additional research beyond the standard official statistics and tracking that I've already identified. The additional includes animation mapping, although this is tightly tied to the certification process, and recent research on carbon footprinting of UK film production. This 'hidden screen industries' panel is very interesting to us, because it is research on this kind of sectors at which we would not normally look.

In the last two or three years the RSU has expanded considerably to incorporate other aspects of the BFI's work. Where, traditionally, the RSU was solely externally focused in order to inform government and other stakeholders, it now collects data on the BFI itself: for example, on audiences at Southbank and the Film Festival. We also have cooperation with other academic institutions and universities: for example, a new research programme called Co-Star in collaboration with Goldsmiths, Edinburgh and Loughborough which is looking at the role of AI and other new challenges; we're working together to map the changes and reactions.¹

We also now have an Innovation Challenge Fund, looking at new issues for the screen sectors. It funds research in sectors where we don't have as much information as we need. We have a pot of money available to commission expertise to provide the data.

EC: Does the RSU have an official responsibility to collect data on all sectors of the screen industry because it's part of the BFI which has a royal charter?

IC: No, it is only obliged to collect data on the five areas of tax relief:

1. Films made in the UK (excluding short films), any budget over £500 2002–2012, and from 2012 everything (our lowest budget is £47).

For the next four categories, we don't collect data on everything, we only collect data on those that *actually apply* for certification.

2. High-end television, anything above £1 million per hour. This has become complicated by the rise of streamers because Netflix and Apple could qualify either as either film or high-end television. There was a leaning towards high-end television for tax purposes initially because if defined as film, the streamer had to demonstrate theatrical release. However, now the film tax credit says that

¹ Convergent Screen Technologies and Performance in Realtime (CoSTAR), launched in 2023 and delivered by the UK Research and Innovation (UKRI) Arts and Humanities Research Council. For further information, see <https://www.ukri.org/councils/ahrc/remit-programmes-and-priorities/convergent-screen-technologies-and-performance-in-real-time-costar/>.

for budgets under £15 million you have a different set of criteria. The need to aim for a cinematic release is still there, the additional criteria relate to things such as having UK producers/directors/writers which then allow for increased tax relief levels.

3. Children's television, no budget threshold; that gets a tax relief.
4. Animation, treated in the same way as children's television with no budget thresholds.
5. Video games: companies can claim tax relief on projects which spend at least 25% of their 'core costs' on goods or services provided from within the UK or European Economic Area.

EC: So it's policy focused? You collect data in order to identify areas where a tax intervention might be needed and then, once applied, you collect data in order to measure the impact it's having?

IC: Yes, broadly. For example, there was a concern that although the total number of films was consistent, budgets were skyrocketing: our research indicated that there was a real pinch point on lower budget films, and that's why the tax relief for those lower budget films was brought in – the Enhanced Audio Visual Expenditure Credit (AVEC) which was announced as the Independent Film Tax Credit (IFTC) in the Spring 2024 budget for features under £15m.

EC: To what extent has the RSU wanted data on the broad ecology to understand the impact of different sectors?

IC: It's our "known unknown". We know that film and high-end television are very much top end especially when looking at employment in the film industry. We know it's underlain by broadcast television, advertising, and the hidden sectors as we're describing them here. The only time we broadened out was during Covid because the Restart Schemes extended beyond high-end: we got extra funding from the Department of Culture Media and Sport (DCMS) for this and couldn't have done it without that funding. It was intensive and time-consuming to collect that data and we don't normally have the resources to do it. But I do know that the Innovation Fund and Co-Star are speaking to collect data on some of those other sectors.

SD: But you're the hidden from us.

EC: What do you mean Steve?

SD: Well, Ian talks as if the BFI does all the important stuff and we're just a whole load of other stuff out there. Obviously, I look at it the other way around.

EC: My current research looks at the history of the way the screen sectors and supply chains in Soho have intersected since the late 19th century to the present day, and it's manifestly clear that advertising has always driven innovation and growth in the film industry. Is the advertising sector having a tough time Steve Davies as a result of digital?

SD: No one's having an easy time at the moment. Today, although there are fewer of the big ads that people used to like to see, there's more audiovisual advertising being made than ever, so there is opportunity out there.

EC: How are your members doing?

SD: We've got a separate struggle: advertising agencies are also under threat from change: they are now trying to do the production themselves for the clients. We tell the clients that the way to get the best talent, expertise and price is to get a triple bid from the independent production sector. But some of the agencies are advising the clients that they'll get the best value for money by using agency production. So, our mission is to make sure that the independent sector continues, and to do that we need to make sure that most of the work goes to the independent production and postproduction companies.

EC: Are the clients producing in-house as well?

SD: Yes, but in my view the clients should produce some stuff in-house: if a morning meeting results in a decision to run a promotion on Amazon urgently, the clients should be able to get something produced in-house that afternoon. But for the creative stuff, the best way is to come to the independent sector and get a triple bid.

EC: Has the APA been able to access any research of the kind the BFI is talking about?

SD: Not much has been done. Occasionally someone's rung me up from a newspaper to ask, 'What is the commercial production sector in the UK worth in terms of turnover?' I'll answer, 'I don't know.' The only way I can get this information is by the APA members telling me. If I survey them, I get a fairly poor response. People aren't motivated. It's a challenging undertaken. But it would be worth doing. The UK Film Council report on postproduction from the 1990s showed that what we call the UK film industry is really a third film, a third television and a third advertising.² I'm not saying that advertising is more important, I'm saying it's a three-legged stool and you need all of it to sustain the UK's facilities, personnel and skills. We don't get any subsidies,

² UK Film Council. 2003. Post-Production in the UK: A study of the current nature and extent of the UK post-production sector. UK Film Council. <https://www2.bfi.org.uk/sites/bfi.org.uk/files/downloads/uk-film-council-post-production-in-the-uk.pdf>.

but we would like more data on our sector to use when we go to the Government about Foreign Missions.

Another area on which we need data is diversity and inclusion. The APA is doing a lot on this, and we are effecting some change. The poorest area is measurement: we can't get people to tell us about ethnicity, sexual orientation etc. This means we're not able to measure the success or failure of our policies and adjust them accordingly.

PR: When the BFI was founded in 1933, it was rooted in a definition of what film was and had been since the Victorian era before feature film emerged. And that broader definition of film continued in some BFI departments, especially the Archive. Feature film, whilst culturally important, is a minority of the content accumulated in the Archive's collection. Ian has brilliantly described and distilled the work of the RSU which was rooted in the work of the Film Council which was centred on the feature film industry. The UK Film Council was in the slightly odd position, in political and Governance terms, of being a feature film industry-centred organisation whose responsibilities included funding the BFI whose remit was based on this broader definition of film. A lot of the scope of the research is rooted in that, am I right Ian?

IC: I've been here for almost 9 years, and when I joined the RSU was transitioning from the UK Film Council and initially it did feel somewhat separate from the rest of the functions of the BFI.

PR: This meeting is very valuable because it's starting to reconnect these stops. But the UK Film Council did do some research in the early 2000s on the industry you look at Steve Garvey?

SG: The sector I represent is brand film. It was originally called 'corporate.' It is the cousin or sibling of the advertising industry, and it can be hard to separate the two. In the past we used the method of delivery to distinguish it: because advertising was delivered on television or in cinemas, 'corporate' was pretty much everything else. The term 'corporate video' was used from the early 1980s onwards to distinguish us from 'industrial film' and it lasted twenty years, even though our delivery format changed from video to various types of discs and DVDs. But when smartphones came along and from 2007 onwards you started to get omni channel which meant you couldn't define it by the method of delivery. The sector then went from omni-channel to an identity crisis: what should it call itself: was it still corporate video or not? Personally, these days I prefer to use the term brand film or brand video. But some people still prefer to use corporate video or corporate film.

How do you define brand film today? The least bad definition I can give you now is that which our sector makes for business purposes, not for advertising. The content is extremely varied. It also helps to look at the source of the budget. Our budgets come from large organisations, both public and private. But if the budget comes from financial communications, training, HR or health and safety, it will almost certainly be our sector rather than advertising. Our sector has a strong community: we know who we are and we recognise each others' work.

The UK Film Council did some research in 2005 along with another organisation, and both came up with broadly similar sets of conclusions over the size, scale and employment levels of the corporate sector.³ But it became evident to me when I was running EVCOM that we needed our own research and we had none: it was hard. For two years we tried to get data, but we didn't have the resources. So I said, 'Why don't you get someone else to run EVCOM for you, and I'll go and try and solve this research problem?'

The solution I came up with is Moving Image Video, which is a research agency and consulting business. There's no public funding available for it. We are funded commercially. The business now breaks even, maybe it makes a small profit. We've built data capture tools and we monitor video output in the sector and capture continuous activity using a code base. We track Instagram and Linked-In with 100 UK brands as a reference dataset. We published our first report in 2020.⁴ Since the first of January 2021, we've had over 100,000 posts and over 30,000 videos within that data. Data collection is highly automated now, but we do two annual surveys, one is through production companies and agencies and the other one is through in-house brands. We get a decent number of responses. The carrot is that we rank them in a league table. The top end is really competitive now between the producers and agencies. That's great for us because they keep giving us their data, which includes a lot of financial information.

We've now got indications of revenue worth and number of employees, number of companies. We can offer useful evidence from the sample that we have, and we can track the sample from our dataset. But obviously, there's an awful lot more we'd like to do if we had the resources. Also *Televisual* does its 100 Survey.⁵

³ See Moving Image's Brand Film Industry Report 2020.

⁴ Moving Image 2020. Brand Film Industry Report. Digital Download. <https://www.evcom.org.uk/news/evcom-and-moving-image-bring-back-the-uk-top-50-and-brand-film-surveys>.

⁵ 'Top One Hundred' *Televisual*, annual survey published by trade publication *Televisual*. <https://www.televisual.com/news/televisual-production-100-results-now-published/>.

EC: What is your response rate?

SG: We get about 100 responses. We've only done it twice. We got 100 this time, 102 last time. We sent it out to around 400. So it's about a 25% response rate.

EC: What future research would be helpful?

SG: Our sector would want more of what we've got. We've got the data collecting going again, and there's a lot of goodwill. But we have virtually no budget to work with. If we have a 25% response rate, with more resources we could get a higher response rate. The problem is that, at the moment, we don't have people to phone up and chase: we have a core of people who reply but we'd like to access others, like those outside London. I think there's a very large number of small businesses in our area it's hard to get through to.

EC: I'm keen to see more research on skills, AI and on the cluster in Soho.

SD: AI isn't really changing anything yet. The cluster hasn't moved outside London it's just become a Soho-Old Street cluster. Agencies still want to come into Soho, that's the fun bit, postproduction companies. It's just an evolution.

EC: Do you see any regional centres growing?

SD: We tried to encourage Manchester but there are only four or five service companies there serving foreign producers coming in to shoot. It's still a very London-centric business. London is the centre of excellence.

PR: What do we know about how many people are employed in these two sectors? How many productions are they responsible for annually? What are their companies worth?

EC: We've got that data in our APA survey which is presented in another article in this Special Issue. I hear that people want data on freelancers, and that there is talk of asking for a Minister on freelancers to support the screen sectors. Is the BFI concerned about this? Does the BFI collect data on freelancers?

IC: The BFI would be very keen to get data on freelancers. I don't know whether there's a call for it currently.

SG: Freelancers are important and we invited them to complete the survey. We don't see value in capturing that data because we can get most of the data we think we need from the production companies. If you look at the large number of small businesses that are the long tail of our sector it's hard to tell who is a freelancer and who is a small business. Everyone has an identify: but are they a freelancer or a company?

You don't need to go into Soho to produce or do post any more. Although London is important, it's less important than a decade ago. Because of the relatively low cost of buying your own technology these days, producers are investing in their own equipment so they don't need to come into Soho for a facilities house. The production can take place anywhere. They could be remote shooting via Zoom. You're often working for a client who is based out of Germany and you often never meet them. One of the complaints we get from producers is that they don't get to see the clients much. There's probably a wider geographical dispersal in our sector than in the advertising sector.

EC: Is data on freelancers important to you, Steve Davies?

SD: I don't think it is especially, for all the reasons that Steve Garvey mentioned. Research on the size of the market, and research on how to keep more work in the UK, these are the important questions we need data on.

PR: I think no one's answered my question about how big these sectors are and what we know.

EC: I think the answer is that we don't.

SG: I'm doing our second report now. Last time, I got the data in, analysed it, produced some initial findings, ran it by Patrick, ran it by someone from a university and asked 'Is this methodology ok?' Broadly speaking the methodology seemed to be reasonable. I would say probably 5–700 production companies or agencies that generate 50% or more of their revenue from this sector that I represent in the UK. The number of people in the sector are freelance or part-time and are between 7 and 10,000, as well as in-house teams. In terms of turnover, the big production companies in this sector are making high teens or maybe millions a year in revenue, maybe 17, 18, I don't think we've got anyone doing 20 million yet. Then there's a very large number who are doing maybe a million.

PR: Do you have a sense of the complete turnover of the sector?

EC: I ran a survey of the APA members in 2022 to get the economic data of Steve Davies' industry – and I present that data in another article in this special issue of Open Screens so I won't summarise it here. Steve Garvey, do you have an overall estimate of your sector?

SG: The best estimate I could do would be around a billion pounds a year with the caveat that that is based on a small dataset with an extrapolation from that.

PR: How would that compare, Ian to the feature sector you track?

IC: Our turnover for 2022 film production companies is £8 billion, but that we know isn't exclusively film. We know that there are people in here [our data], who are in your sectors because they are reporting quite a chunk of activity in advertising. We try to filter them out through various SIC codes,⁶ but we can't do that fully. The UK spend for film and high-end television is around £5 billion that we know is directly related to film and high-end television, so we know that £8 billion is not – we're not saying it's all advertising, it may be other activities.

EC: Yes, the SIC codes are a real problem.

SG: I took a sample of 20 or 25 companies in this sector and came up with something like 9 different SIC codes.

EC: I wrote a paper published in 2022 about the problem of SIC codes in screen advertising for the APA.⁷ I took a sample of APA members and found they were not reporting under advertising. Having worked in the sector myself, I know that it is the accountants who submit the Companies House returns and enter the SIC codes. I don't think we're going to manage to change the way they report it, I think we need to get some research grants from the UKRI to do the labour-intensive research.

SG: I agree that's not the way to go. Our sector changes very fast. The brands who hold the budgets don't really care about SIC codes. They don't care how it's done. They only care about the result. They won't follow a particular method, they'll just do whatever works. It's very dynamic, it changes fast, so SIC codes won't capture that.

EC: What data does the BFI hold about freelancers at the moment?

IC: Not very much. The data comes from the Office of National Statistics (ONS) and anecdotally. Broadly, we know it from the companies, we don't have anything robust on it. We don't have data, we just know that freelancers are part of it.

EC: My research on freelancers not just in the UK but in other countries like France and Sweden suggests they are crucial, because when freelancers feel economically secure, they take risks and they innovate.⁸ Freelancers are innovation leaders. That

⁶ Standard Industry Classification Codes.

⁷ Caston, Emily. 2022. "The Screen Advertising Production Industry: SIC Codes and Screen Industries Mapping." *Media Industries* 9:1.

⁸ Caston, Emily. 2025. 'British Fishing in the Nordic Music Video Waters', in *Nordic Music Videos*, edited by Korsgaard, Mathias Bonde, Anna-Elena Pääkkölä, and John Richardson. Routledge, forthcoming.

infrastructure like paternity and maternity leave for freelancers is really important. What are the basic questions that we need to know?

SD: We don't really know because there's the freelance production team, and then there's the freelance crew. That's not critical information to us, I mean, obviously, we're interested in their wellbeing, but we don't need to know how many of them there are.

PR: Question for the two Steves: how much bleed is there between the two sectors? Because they haven't historically been very separate since the 1930s, not totally separate but quite a sharp divide. Nowadays there's a blurring in genre and aesthetic terms in the realms of branded content between the advertising and corporate industries, [which] are crystallizing towards. Are they still separate?

SG: I think there's quite a lot of overlap actually in production crew. In camera crew, directors of photography (DoPs) get paid a higher rate in advertising so prefer to work there. There's a skill difference, but not at the production level, as long as the crew know how to talk politely to the head of comms at some chemical company who won't be an expert on film and will probably say some stupid things on the shoot, but you smile and go along with it. The difference in skillset comes at the management level and the account management level: it's knowing how to deal with people. We've tried bringing senior people in from broadcast, but they can't stand working with corporate clients because they don't know anything about the subject. They find it very frustrating. But at the technical crew level, they do crossover well.

EC: What union does your freelance crew work under Steve Garvey?

SG: They don't as far as I know.

EC: They are non-unionized?

SG: As far as I know.

EC: So that's an immediate challenge as far as data collection goes. That's labour-intensive research to find out how many and what their experiences are. Steve Davies, are your freelance members unionised?

SD: That's an interesting question. I've never quite understood why there isn't more crossover between the sectors, the corporate and commercial. Certain grades are very unionised – grips, electricians, riggers, etc, they're all in BECTU.⁹ Others have some

⁹ Broadcasting, Entertainment, Communications and Theatre Union.

representation but don't tend to be in a union. They might have a group, like set designers.

PR: If the research that Emily and SD have been doing in the ad sector and SG on the corporate sector is there a good way to incorporate that in RSU data? And how might it change a national understanding of what the screen industries are?

IC: It definitely would be information really useful for us to have. The one time we broadened out was during COVID-19, as I've said. It was useful to get a scope of what was going on outside the sectors we look at. Production was all over the place. At the start of the pandemic, we had an estimate from a large consultancy firm that had spoken to people inside the industry to find out how many billions were being spent. The estimate they came back with was out of kilter with what we ended up with, and we never quite understood why. It felt like they'd drastically overshot. But we never got to the basis of why. It gave us an idea of what we weren't capturing and of what we don't know.

Any research and data you can provide on that unknown can help us. We know we are capturing data on spending that is not generated by what we are attributing it to. We have been transparent about that. Being able to accurately pick apart what is included in that, and what is not included is difficult. Data on your sectors would be a very very useful resource for us. How we would incorporate it into our reporting structures, I don't know. It would be useful for us to have a think about it. It probably doesn't fit directly into our official statistics, but it could fit robustly into our other reports like the screen business ones.

EC: How does the RSU work connect with Screen Skills?¹⁰ I believe they only collect data on Film and high-end television.

IC: We do work reasonably closely but on an ad hoc basis. For example, we were doing some work on Yorkshire, and Screen Skills had much richer company data on the region than we did – so our picture of employment in Yorkshire came mainly from their data. We now have a Director of Skills in the BFI, Sara Whybrew, who is steering our work on Skills.

EC: Am I right that in Covid, the APA did its own survey on D&I?¹¹ You've been very active.

¹⁰ The industry led skills body for the UK's screen industries: <https://www.screenskills.com/>.

¹¹ Diversity and inclusion.

SD: Yes, we did. There are barriers though. Tom Knox, the head of the IPA,¹² tried to do a survey about diversity, and he found that the response from agencies was very poor: they didn't want to respond to the survey because they were doing badly on diversity and inclusion. His answer to the agencies was, 'I know you're doing badly, that's why we're doing the survey.' The people at the top have to be motivated. The people below have to think there's some personal interest in doing it. Maybe they don't care, they think it's intrusive or if they are white male, maybe they don't want to.

EC: Did you put in place some new strategies for recruiting directly from schools?

SD: Yes, we have done a lot, and you can see now how if you look out across the industry how much more diverse it is. When people are looking to recruit now, they can't say they want to recruit someone from a different ethnic minority, but they can look in different places. We direct our members to recruit with organisations who are helping people from different areas. Our members are making a real effort. But the measurement is lacking.

EC: It's important we track that. Your members have been very active on a voluntary basis. Steve Garvey, what have you been able to do on this?

SG: I suspect we're well behind the APA on this. Our questionnaire goes to the head of the video team in the brand or production company. After much deliberation, we decided that we couldn't ask these heads to define what the sexual orientation or ethnicity of their team was. You have to ask the individuals themselves and we're not set up to do that. There would have to be a different survey. But we do ask the agency heads who do the survey to identify their own ethnicity, sexual orientation and gender which gives us a little bit of information, but not much. It would be well worth it to do this research in the sector but it's a separate piece of work.

SD: I think self-identification is right. But just to give you an anecdote of the problems you can encounter. We included a question about sexual orientation, and quite a senior person running a production company said to me, 'Please take that out, I'm gay, I've always been gay, everyone knows I'm gay, but it's got nothing to do with my job.' I thought, 'Fair enough.' You're seeking to be inclusive, but there are potential missteps.

PR: Indeed, but it would be useful to track demographic differences between these sectors, especially on barriers to entry.

¹² Institute of Practitioners in Advertising.

EC: Yes, historically advertising has been easier for new groups to get into than advertising. Ian, what D&I data do you collect?

IC: In the broad production sector, we don't have data. We do have data on applications to the BFI film fund. Last year we provided aggregated data to Josh Cockroft who was working in association with the Sir Lenny Henry Centre for Media Diversity at the University of Birmingham. They were doing a deep dive to come up with recommendations for us. We know that people applying for BFI film fund funding are different to the broader production sectors. We know anecdotally how un-diverse lots of bits of the sector can be. We know that the BFI film fund can be a positive way to change this. Josh Cockroft came up with an analysis saying where it was lacking across the board, and we were comfortable with that.

PR: Donald Rumsfeld again.

IC: Yes it is [laughs].

SG: Production company and agency heads in the UK are very male and white. I'm a good example of that. I started working in the late 1980s. There are a very small number of women running those companies twenty years ago and no people of colour. There are far more women coming through now but I'm not seeing much ethnic diversity at a senior level. We don't have data on lower levels. You need to bear in mind our corporate clients and customers twenty or thirty years ago who were almost certainly male. Women's roles were very specialised as production partners, but women would have been up against all those barriers – male-dominated senior and leadership levels.

PR: I feel all of this is rooted in history. When film first emerged it was short form with all these different functions, and then feature film emerged and became the first amongst equals culturally but maybe not economically and I think that's still the case today and I guess a lot of what we've talked about is that this cultural predominance of feature film still remains although under the bonnet it doesn't connect.

SG: The hook that enables us to get the surveys done is the fact that we are working in partnership with the BFI: that motivates people to complete the survey. I hope that's a collaboration we can continue. The BFI's brand has an aura that everyone recognises. People in our sector do occasionally get involved in making features and features are seen at the top of the tree creatively.

EC: It would be good to connect with Steve McConnachie's database at the BFI. Back in 2015 when I began the British Music Video Project with the BFI,¹³ we held a meeting

¹³ Fifty Years of British Music Video, 1964–2014: Assessing Innovation, Industry, Influence and Impact. AH/M003515/1. <https://gtr.ukri.org/projects?ref=AH%2FM003515%2F1>.

with him. Our shared dream was to collect a database of freelancers that would show these interconnections across the supply chains of feature film, advertising, brand film, music videos and television. Does that dream still exist?

IC: I think this pinpoints the size of the BFI because Steven is almost entirely removed from what we do in the RSU. It sounds like the kind of output we would really like. We've done it by mapping some people's careers in film: to see how they started on a small film and ended up on a big Hollywood film. But if we could do it for the whole ecology, that would be magnificent, and I would have faith that Steve would make that work.

SD: It wouldn't necessarily have to be that ambitious. A simpler way to do it would be to take ten people. I'm sure we could find people of different ethnicities, genders, who spent time in advertising and then television or film and make a good argument through that....

PR: Yes, micro studies.

EC: Researching the history of Soho's screen industries, though, what's struck me is the sheer volume of below-the-line crew who work across the sectors. What's also significant is the number of new crew roles like colourist that developed in the hidden sectors before those roles and technologies were adopted in feature film or high-end television.

SD: We've just concluded negotiations with BECTU over crew rates. Do you do that, Steve Garvey?

SG: No but our production company and agency heads would like someone like me to do average crew rates for our sector. We found a few years ago that there were colossal differences between the rates companies were paying.

SD: Do your producers budget for the rates they think they can get for their regular people?

SG: Yes and they've almost always got their favourite crew. But it's all based on experience rather than science.

SD: That's interesting because commercial producers couldn't do their budgets at all without rates being set, but your producers have obviously found a way to make it work that is satisfactory.

SG: Yes, I think they'd prefer to have some rates, but no one's had the resources to negotiate them. There's no union in our sector but maybe, if we set them, maybe the union would move in.

SD: Yes, but the trouble is it would necessarily be inflationary so you might be better off where you are.

EC: What percentage of productions stick to the rates?

SD: Pretty much all of them, because the crew stick to them. If you've got to get a budget in tomorrow and you haven't got time to talk to people, having fixed rates does make it easier. But as I do tell the producers, we're in an international competition: if we put our rates up, we might not get the work. It's said that the average shoot day in the US is 40–50,000 dollars, and a huge amount of US production has gone to Mexico and Canada. So when crew rates rise, they may be damaging the sector.

EC: Which countries do the APA members tend to lose bids to?

SD: Europe – Prague, Bulgaria, Spain, but it depends on price and weather. South Africa in the winter. Some to Mexico.

PR: In the past, the industrial film sector was highly unionised. It was effectively taken over and destroyed by the corporate video industry in the 1980s. To use your term, Steve Garvey, it became like the Wild West. The differences in unionisation between advertising and brand film you're describing perhaps reflect that history. I suspect there wasn't such a sharp discontinuity between the pre-Thatcherite era and the post-Thatcherite era in the advertising industry in the 1980s?

SG: Yes, video technologies changed it. I got my ACTT¹⁴ assistant editor's card just at the point where film was becoming a bit irrelevant. But when it came to producing video there were people who were just willing to go off and shoot video: they didn't need a union, and they didn't need a union card; they just went off to shoot.

EC: What happened at the APA Steve? It was initially the AFPA, the Advertising Film Producers' Association, wasn't it? And then with video, it became the AFVPA or AVFPA to include Video in the name.

SD: As you've just proven, no one could say it [laughter], so we dropped the F and V. We realised we didn't have to have every format in the name. The postproduction sector is particularly interesting because it's changed so rapidly. In commercials there were just three postproduction companies – The Mill, MPC and Framestore; they had 80% of the work. But in the last three years that's changed and now there is no dominant company; instead, there are lots of new companies. People no longer have to own the

¹⁴ Association of Cinematograph and Television Technicians (1933–1991).

technology; they can rent it. The barriers to entry have disappeared. People have left the big companies, and there is now a universe of visual effects companies.

SG: That's exactly what happened to our sector in the 1980s when video was adopted, and later when it went digital. You didn't quite have only three dominant companies, but you had something similar. Although the technology was radical it did require quite intensive capital investment and that lasted about twenty-five years. It was when you could edit on a laptop that things changed. Since then, producers have had to justify what they are for. In the past you'd say 'I've got four edit suits,' and that's why your client would pay, but that doesn't work anymore.

EC: Steve Davies, has the audio sector changed as much as postproduction?

SG: No, because you still need sound studios. Audio is a real success story in the UK. London developed the idea of audio separate from music before anybody else. You've got successful top-level companies like 750, Wave, and Factory.

EC: Are there any areas where research might help? We haven't heard much from the Labour Government yet, and the Shadow Minister lost her seat to the Green Party.

SD: We've had too many different culture ministers in the last fourteen years. A starting point would be to give someone the job and give it to them for the whole Parliament to let them learn, be committed and achieve something.

IC: Lisa Nandy is the new Secretary of State for Culture, Media and Sport. Labour's Creative Industries template plan, published in March, fairly closely mirrored the BFI's ideas so we're expecting their plans to be broadly in line with what we want to see. The Conservative Government was broadly aligned too. One difference is that Labour wants to broaden the apprenticeship levy out to be more applicable to the screen cultural industries. We understand that the IFTC will carry on.

SG: I'd like to turn the question around: What might they get from us? The UK has a big issue with training and skills, our training is lacking compared to other economies worldwide. EVCOM¹⁵ has a lot of companies in the training sector. We could offer a new Government video-based training as a way to grow the economy.

PR: What Steve Garvey is saying is very interesting. It's about film utilities in the interests of the economy overall. The BFI Archive holds the film collection of the British Productivity Council – approximately 200 films between the mid-1950s and mid-1970s.

¹⁵ Event and Visual Communication Association.

SG: Our sector is a major exporter, and I imagine that like all screen sectors in the UK, Brexit made exporting difficult after Brexit. The UK is still seen as the centre of excellence in brand film. Our sector saw a startling and huge increase in exports between the UK FC research in 2005 and our research in 2022. In 2005, the majority of revenue came from domestic brands. By 2022, the majority came from outside the UK. That was partly because of the work EVCOM had done in trade missions with funding from the Department of Trade and Industry to get producers out into the Middle East and the Far East where, at least then, there wasn't anything like our sector. But there is no doubt that after we left the EU, the number of our German and Scandinavian clients tailed off. Our goal is to try to grow the revenues for producers. So there's an export story to work on.

EC: Do we have data on the predicted loss of skills from BREXIT?

IC: Certainly, as soon as the referendum happened, we were in panic. For the last six years, we've known that skills are a real weak spot. I'm trying to think if we've any data showing our fears were born out and I think the answer is no.

EC: I feel the elephant in the room is education and skills. Many universities are in dire financial straits with up to 25% forecast to go bankrupt without intervention, and many of those specialise in teaching media and film. Steve Davies, am I right you bypass all this by recruiting directly from schools?

SD: Not quite. We do speakers for schools. But we try to do our own training. Regarding the apprenticeship scheme, we need to look at costs. The questions for us are: how many people would the scheme train, and how much would our members have to pay for that? We need to be sure it's the most efficient use of our funds. It might be more efficient for The APA as a trade association to do it ourselves. We already run a course for one hundred and twenty people a year which costs the APA members very little money.

EC: Is that an issue for your members, Steve Garney?

SG: Again, the APA is ahead of our members. Most of the training is training on the job. For a few big producers, in-house training is very high. In universities which teach film, as you mention Emily, awareness of our sector is very low. We found that if you ask students if you'd consider a career in this sector they'd never even heard of it, let alone considered it. So, I think what you do for this sector is you find people, raw talent, and you train them up. Some might turn that into apprenticeships, but it's very unstructured. We'd need resources and planning to do something more.

EC: Well, this has given all of us a great deal to think about, and has hopefully given our readers an insight into potential avenues for future research. We've covered a lot of ground. Thank you all so much.

Competing Interests

The authors have no competing interests to declare.

