



British Screen Advisory Council

'Bringing the audiovisual industries together'



Local Heroes and Inbetweeners: The Contribution of the Independent British Feature Film Sector to the UK Audiovisual Production Industry

A Workforce Study

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*This study was conducted
For the British Screen Advisory Council
By NARVAL Media Ltd*

'I found my involvement in local independent films gave me more opportunities to experiment. You get to craft as you shoot instead of just doing coverage.'

Cinematographer

'Independent British features have been critical to my career. I wouldn't be where I am now without it.'

Line Producer

'UK independent features experience allows you to have a sense of importance and everyone feels they're contributing because they can see their work on the screen.'

Art Director

'The independent British films I did, all came at a point when I needed more experience; these films gave me the capacity to learn at a relatively lower level of risk as compared to blockbuster films or big drama productions.'

Line Producer

'British independent films are rewarding to make but you can't rely on them as a stable career option. I could go a whole year without working if it was my only source of work.'

Cinematographer

'In the UK, the independent British film sector is analogous to the subsidised theatre. Both pay back public sector investment many times over because they attract high-end tourism and serve as nursery slopes for new writers and Directors who go on to inject new energy and skills into our cultural industries.'

Director

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Executive Summary

Aims and methodology

- This study aims to provide evidence of the role played by Independent British Films (IBF) in developing the talent that supports the booming production levels in the High-End TV (HETV) and Inward Investment Film sectors.
- The study's aim to measure the instrumental value of the independent sector for the first time, rather than reiterating its intrinsic qualities, seems especially apt in the current context: the anticipated challenges that a post-Brexit international trade environment will pose for the maintenance of the UK as a globally attractive place to do business.
- The study uses a combination of qualitative and quantitative methodologies to analyse the careers of senior professionals, working in one of four key production posts, all of whom were employed on High-End TV or Inward Investment Film projects in 2016. The methodologies are:
 - In depth, one-to-one interviews with 32 such senior professionals.
 - An initial analysis of the 18,844 career credits accumulated by 548 such senior professionals over 11,999 career years.
 - A further detailed analysis of the 6,595 credits which were in long form content that was broadly comparable to the HETV and Inward Investment projects on which the subjects worked in 2016.

Key Conclusions

- Senior professionals currently working on big budget HETV or Inward Investment Films in the UK typically require skills honed, and reputations built, through direct professional experience.
- Developing such attributes is a long process – nearly half of the career credits accumulated by the 548 professionals in our sample were in roles other than those they currently occupy as they worked up to their current head of department positions.
- Over one quarter of that experience in long form content – 27% – has historically been achieved through working on Independent British Films.

- A far higher proportion – 41% – of career credits for those who ended up working on a UK-based Inward Investment production in 2016 were Independent British Films. This compared with 23% for those working on HETV in 2016. The contrast confirms anecdotal evidence of a strong degree of separation between and film production as career pathways during past decades.
- Senior professionals currently working on big budget HETV or Inward Investment Films overwhelmingly confirm that working on Independent British Films has had positive skills development effects, owing to the greater flexibility over roles leading to more opportunities to hone existing skills and develop new ones, and to take on new responsibilities.
- Many cite work on Independent British Film projects as ‘career staging posts’ which were ‘pivotal’ or ‘critical’ in placing them in a position to be given roles in HETV or Inward Investment Films.
- Negative aspects of working on Independent British Film projects were also highlighted, including concerns about long development periods and cash-strapped, crisis-ridden productions discouraging production talent at early career stages, and long gaps between productions and lower pay levels driving talent to work in other audiovisual sub-sectors.
- Despite these issues, it is clear that Independent British Films have made a significant contribution to the development of the talent that currently supports the success of the broader UK audiovisual production sector.
- With Independent British Film currently going through a particularly difficult period, it is not clear how any resulting decline in opportunities for talent development might be made up, especially as the relatively small size of the production spend compared with HETV and Inward Investment Films appears to belie the scale of its contribution to the eco-system.

Definitions

The present study combines qualitative interviews and quantitative career data. The quantitative study consisted in gathering production credits for 4 types of senior professionals, namely Directors, Line Producers, Cinematographers and Art Directors who were working in the industry in 2016.

We recorded career-long credits for these professionals and assigned them to 5 categories of productions: **‘Inward Investment’**, **‘HETV’**, **‘UK TV Single Film’**, **‘Independent British Film’** and **‘Other types of works’**.

For the purpose of this study:

- ✓ **‘Inward Investment’ productions** are understood to mean principally those productions developed, controlled and majority financed by foreign companies (predominantly US studios) that locate a significant proportion of their manufacturing cycle in British studios and/or locations and use significant numbers of local crews and talent in the process. Note that for the purpose of this particular study, the shooting of sequences from Indian ‘Bollywood’ films, financed from India and production-managed from the UK, have not been included.
- ✓ **‘High-End TV’ (‘HETV’) productions** are understood to be scripted projects with substantial budgets¹ made primarily for the broadcast television primetime/evening schedules (and/or online VoD platforms) and of an episodic nature, (typically between 6 and 12 episodes per season). This last distinction is important as we are distinguishing ‘HETV’ from ‘Single TV films’ as two separate categories in this study.
- ✓ **‘UK TV Single Films’** These are single films (generally feature-length) made primarily for the broadcast TV market and/or VoD platforms. Whilst budgets and production values may be variable, these are distinguishable from episodic high-end TV productions.
- ✓ **‘Independent British Films’ (‘IBF’)** are understood to be films developed and made primarily with a theatrical release as its first market, in the UK, with largely British and EEA cast and crew and/or co-produced films with elements

1 UK Treasury rules and definitions for the purpose of qualifying projects for the bespoke 25% tax credit specifies HETV as *‘[...] scripted television projects with a minimum core expenditure of £1m per broadcast hour’*. However, since our survey analysed credits over a period of several decades prior to the introduction of the tax credit definition in 2014, we had to make judgment calls on TV productions prior to this date, based on the available data sources.

of cast, crew and/or management and financing from the UK, made outside the US studio system of full production finance and control. We acknowledge here the fact that it is notoriously difficult to assess projects for this particular category, especially in view of the historically inter-dependent nature of the UK film industry with that of the US (see below for more notes on methodology).

- ✓ **‘Other types of works’** is understood to mean literally any other credit that could not be ascribed to either of the four main categories, the majority being adverts, short films, music videos and lower-end TV productions including daytime and primetime ‘soaps’, etc. It also contains a smaller number of foreign films and HETV productions financed and produced outside of the UK. Credits for these types of productions are not included in the analysis. Their importance to career development is not in doubt. However, in designing this study, the authors took the view that it was reasonable to focus on the 6,595 credits in long form content that was broadly comparable to the HETV and Inward Investment projects on which the subjects worked in 2016.

The main methodological challenge of this quantitative study was to avoid errors in assigning credits to the various categories we adopted. This, as stated above, was at times especially challenging for the ‘Independent British film’ category, in view of its great diversity. Our approach to defining these categories was shaped by extensive discussions with the BFI Statistical Unit team. Towards the end of this process, BFI also ran a sample check on our data results, to corroborate their accuracy.

A. Study Objectives and Research Tools

This study provides an original new perspective on the British independent feature film production sector. In the main, past studies have examined this sector endogenously, assessing its structure, market challenges and inherent value (e.g. measuring investment and job creation generated by the sector in order to sustain itself). Our aim was instead to offer an initial **analysis of the extent to which – and the ways in which – this sector may directly and indirectly support the growth of the wider UK audiovisual economy** and contribute to its competitive advantages as a global production base through the development of a highly-skilled pool of talent, managers and technicians.

Our focus in this study was on a single indicator: **the contribution of UK independent film production to delivering a highly skilled, experienced and competitive production workforce able to transfer its creative and managerial excellence to two other key strategic areas of UK audiovisual content production, namely high-end television/online ‘streamer’ content (HETV), and so-called ‘Inward Investment’ single feature film productions.**

To reveal the scale of that contribution, the study uses a combination of qualitative and quantitative methodologies, both involving senior professionals, working in one of four key production posts, and all of whom were employed on High-End TV or Inward Investment Film projects in 2016.

A.1. Qualitative Interviews: Methodology

In the qualitative study, we carried out in-depth interviews with a cross section of 32 UK film workers who were recently (2016) working in senior positions on UK HETV shows and inward investment film productions. **The grades selected for interviews were Line Producers, Directors, Art Directors and Cinematographers (those same 4 grades were also the focus of the quantitative study – see below).**

Interviews concentrated on three areas:

- 1) The interviewee’s initial entry pathways into the business and what had preceded those entries (e.g. no formal education, unrelated higher education, film school, etc.).
- 2) The interviewee’s individual career trajectories and the range of motivations and external factors that led to certain career choices being made by them at certain times.

- 3) The **interviewee's own subjective assessment of the impact of having worked on independent UK features** (skills development, further career prospects, springboard to career direction changes, etc.) – this question is the core of the study.

The interview selection were individuals in the higher band for Independent British Film (IBF) experience, **with an average of 12 IBF credits per career**. By comparison, fewer than 45% of the 548 careers in the quantitative study had 12 or more credits. The bias was deliberate on our part: the need to get sufficient anecdotal data on the qualitative impact of having worked on IBF justified it. However, those selected were not outliers and only 5 interviewees had over 20 IBF credits.

Every single interviewee whose career we analysed **ended up working in a senior grade (as Head of Department [HOD] or Director) on one (or more) high-cost UK film or TV drama production in 2016**. How they got there and the extent to which their experience on the sets of local independent films helped them get there are, in essence, the two questions this study will have begun to answer.

A.2. Quantitative Study: Methodology

Alongside the qualitative assessment of the specific contribution independent films have made to these film workers' careers, the quantitative study consisted in taking a **sample year – 2016 – and drawing up an exhaustive list of all the HETV and inward investment projects** that started production in the UK in the course of that year. Next, **we listed the names of every Director, Line Producer, Cinematographer and Art Director that were attached to these 2016 productions**. We then retraced the credits of each of these individuals, spanning their entire careers, from their beginning (sometimes decades ago) all the way through to 2018.

We chose to focus on the four above-mentioned professional job descriptions because they are amongst the most strategic posts in film or TV production in terms of delivering both artistic and managerial quality. They also tend to be culmination roles in film careers, the roles in which most of those surveyed, as Heads of Departments (HOD), will tend to stay in and consolidate their reputation². Their careers as sampled here are – we believe – sufficiently reflective of the competitiveness of the UK film and TV workforce as a whole.

² This is, of course, not necessarily always the case, e.g. some line producers move on to Co-Producer or Producer roles, some Art Directors may transition to Production Designers and some Cinematographers to Directing.

This process delivered a sample of 548 senior production workers who between them had accumulated 18,844 individual credits across a combined total of 11,999 career year, an average of 34 credits per individual. The British Film Institute supplied the list of all recorded UK HETV and inward investment production starts for 2016. From this baseline, we constructed a database charting the credits of the 548 over the entire span of their professional careers. The quantitative results are based on the 6,595 credits attributable to 4 long-form categories of productions only: inward investment films, single TV films, HETV series and Independent British Films³.

3 Credits for ‘other types’ of productions, including short films, music videos, adverts, foreign films and low-cost TV drama (soaps) are not included. Their importance to career development is not in doubt. However, in designing this study, the authors took the view that it was reasonable to focus on credits in long form content that was broadly comparable to the HETV and Inward Investment projects on which the subjects worked in 2016.

B. Study Results

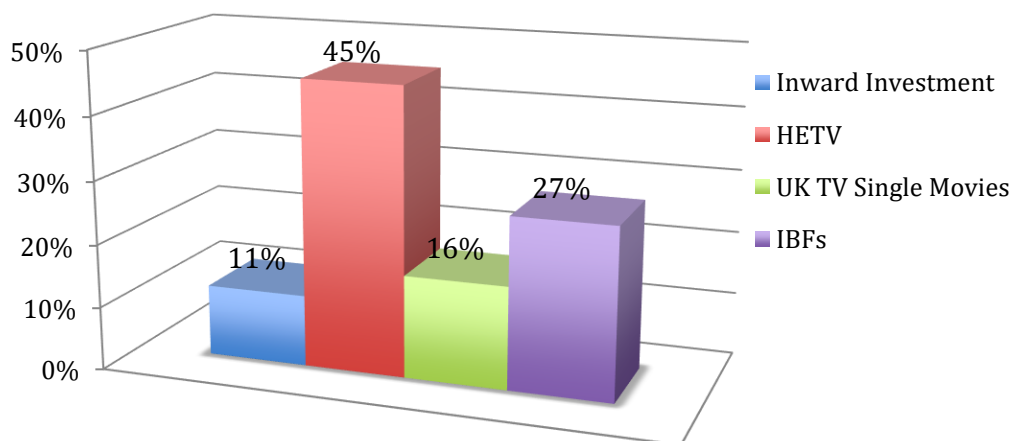
B.1. Independent British Films: Over a quarter of all career credits

Independent British Films have been an important component in the careers of the UK audiovisual workforce that were recently employed in senior grades in two other areas of the business, namely inward investment films and HETV (including serial drama content commissioned by online platforms or ‘streamers’).

27% of professional full-length production credits garnered by surveyed individuals in the course of their careers (just over 1 in 4) were identified as IBF. This overall result corroborates anecdotal perceptions about the importance of the domestic independent film sector as a contributor to jobs and career development amongst the UK audiovisual production workforce over a historical period of roughly 35 years from the early 1980s⁴ to 2018.

73% of the professionals surveyed had at least one IBF credit in their career. Only 27% had no IBF credit.

Figure 1. Career Credits by Category of UK audiovisual production



Looking deeper, we find revealing contrasts: the proportion of IBF credits was markedly higher, at 41%, for those professionals who were attached to an inward investment film production in 2016. This compares with 23% IBF credits for those attached to an HETV production in the same sample year.

4 Earliest career starts in the study group were between 1978 and 1982.

Although these headline statistics do not – in and of themselves – tell the full story, this contrast is consistent with anecdotal evidence suggesting the film and TV production industries were functioning in largely separate professional silos over the historical period covered by this study. It is also important to note that the boundaries between the two sector may have become more porous in recent times, with the well-documented shift into long form TV of many established UK film companies, in response to increased demand for high-end content from the international streamers and their competitors in longer established media, including free and pay TV. The historical data is therefore not necessarily a reliable predictor of current and future trends, owing in particular to the relatively recent effect of the market ‘disruption’ brought about by rise of the streamers.

B.2. Assessing the qualitative value of Independent British Films: Interview results

The qualitative study results in this section include several career case studies and quote extensively from other interviews in order to help illustrate generic observations made by several interviewees on each set of issues.

The names of the individuals have been withheld and we refer instead to their individual job title + a specific number (e.g. ‘Art Director 4’, or ‘AD4’). We believe that anonymity is essential in ensuring interviewees would feel free to disclose career details and also to express relevant criticisms.

B.2.1. Main factors driving individual career choices

The careers analysed in the interviewees were not managed in a manner consistent with a single vision and strategic focus in terms of the type of productions that ended up on individual CVs. Whilst many may have started out with preferences for a certain type or genre and/or aesthetics or scale, these factors tended to recede under more pragmatic considerations. We identified seven salient decision factors:

✓ Career vision

Half of the interviewees reported starting out with a degree of clarity about the role they wanted to occupy eventually. Another third grew into their current job descriptions organically, working their way up the production hierarchy without necessarily being clear from the outset what their career ambition was. A few changed course by finding out where their natural abilities would be best used after initial experiences on sets.

In terms of IBF involvement, one third of interviewees said they set out with a positive bias in favour of working on features films in general. Some later elected to work on IBFs to the extent that the opportunities presented themselves and said they either did not have the skillset required to work on Inward Investment films or simply preferred what they described as the more informal and cooperative sub-culture of IBFs.

✓ **Network and mentoring effects**

Without exception, professional networking and mentoring were reported to be the most influential factors in the choice of production engagements made by interviewees at any given time between early and mid-career. The years of complementary on-the-job skills acquisition that most of them had to undertake implied a strong reliance on such social effects.

For several interviewees currently working as Cinematographers and Art Directors, the unit you entered as a runner or assistant *'is the one that took you along to your next job and then the next, if you didn't foul up'* as one Cinematographer attested. In the majority of cases, it seems the early to mid-career trajectories they went on were based therefore on choices made not by themselves but also by their HOD mentors and/or other senior members of their unit.

✓ **Economic opportunity**

Unsurprisingly, economic opportunity was seen as almost equally as important as network and mentoring effects. Mentors, after all, also depend on supply and demand trends in audiovisual entertainment. One of the limiting factors often cited about IBFs was the volatility of projects, with a high proportion failing to get to principal photography owing to frequent challenges in closing the financing and committing the talent. By contrast, the relatively greater predictability of HETV project development, the longer work engagements this sector provides and the sheer volume of this type of productions, especially in the past decade, have made it a new economic magnet.

✓ **Technical/artistic opportunity**

The desire to be technically or artistically challenged, to go on to the next level of risk in the application of skills was a frequent theme, especially amongst Art Directors, Directors and Cinematographers.

In the next Section (II.3.2.) this report goes into further detail about the extent to which IBFs may have historically been reliable outlets for such ambitions. However, the majority of interviewees also said they had observed a historic narrowing of the gap in production values between IBFs and HETV in recent years.

✓ **Local identity**

Local identity, the sense of one's life being rooted to a particular nation, region or city of the UK was cited by several respondents as an important factor. This factor also intersected with the network effects described above. *'I was driven by local availability rather than a sense of career progression'* says one Scottish Art Director *'and without independent features, my career would not have been too dissimilar, owing to the small scale and strength of our local professional network and the regular opportunities to work on TV shows made in Scotland'*.

✓ **Family priorities**

A fifth of the interviewees cited family circumstances as determinant factors in driving the choice of production work at various stages in their careers. *'After my divorce, I made a deliberate choice not to work outside the M25 perimeter for 10 years, so I could prioritise our children'* says one Director for whom this self-imposed constraint meant turning down offers to work in the US. Four other interviewees said starting a family had meant making choices of productions located closer to home and/or with shorter schedules.

✓ **Training and educational deficits**

Two interviewees said early deficits in their acquisition of relevant skills had been a factor in later career choices. One Line Producer said he now wishes he had served as an Assistant Director to begin with and admits to the experience gap having confined him to the production office for longer than he was comfortable with in the course of his career, as well as limiting his ambitions until mid-career.

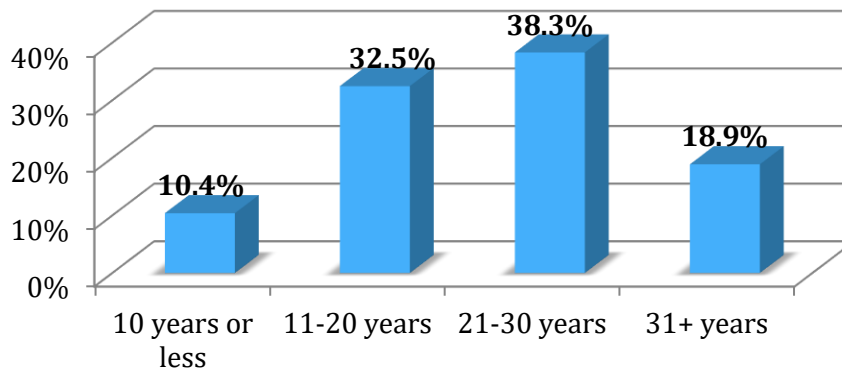
B.2.2. Independent British Films impact on interviewees' skills development

Interviewees were asked whether their work on UK independent feature films had contributed to the development of the core skills necessary for them to acquire status and competitive weight in this specialised labour market. As additional context, they were also asked to discuss what the skills they had come in to the industry with had been and the extent to which those were complemented through direct professional experience over time.

As our interview sample is made up of very experienced HODs, it is also a relatively older sample, since attaining those grades demands years of professional exposure. The interviewees broadly reflect the composition of the quantitative analysis group as

a highly experienced workforce. 57% of the 548 professionals in our career credits' study had over 20 years in the business, whilst only just over 10% had 10 years or less.

Figure 2. Years in career



The result is consistent with the choices we made of: a) selecting 4 roles that normally require a relatively long apprenticeship; and, b) the nature of the majority of productions in both samples (i.e. HETV projects and Inward Investment Films) as high budget affairs requiring considerable experience in both managerial and creative roles.

Every single one of the interviewees reports having entered the industry with either no relevant skills or incomplete professional training.

For those with career starts in the mid-80s to mid-90s, the availability of pre-career or early career technical training was scarcer than it is today. For their staffers and some of their freelance hires, UK broadcasters offered a stable pathway to further training (e.g. BBC and the leading ITV franchises such as Granada TV or Yorkshire TV). However, interviewees report that the training on offer tended to focus on the needs of fast, multi-camera shoots suitable for low-cost/long-form drama (daytime and primetime soaps) and sometimes lacked broader applications.

The lack of relevant skills at career outset is not necessarily indicative of deficiencies in the availability or quality, of film-specific professional training. Amongst those interviewees who had gone into higher education, the majority had in fact prepared for a different career and gone into film/TV by chance or as the product of a change of course. They had not sought specific training to fit the professional ambition they eventually formulated.

For those whose higher education had contained film or media studies, the highly technical nature of the skills required on a film/TV set also meant a long complementary on-the-job apprenticeship.

This is true, for instance, of the Art Directors: all interviewees in that group attended art school (or took an architecture degree), yet found that the path to Art Directing had required them to develop new skills (managerial ones in particular) for which formal education had not adequately prepared them.

Amongst the Cinematographers surveyed, a lengthy on the job technical apprenticeship was required whatever their background and whether or not they had had prior general or higher education.

The Directors we interviewed had a wide variety of pathways into their professions: entry points included: a University degree followed by film school; directing low/no budget short film(s) used as application to film school; direct on the job apprenticeship (e.g. entering as a runner); or local employment schemes. One Director had a 20-year career directing for the theatre before beginning a career in TV and film. Three Directors now aged 50 and over had had their career starts through training schemes ran by UK broadcasters. The same broadcasters also gave them their first break, on in-house productions.

Amongst the Line Producers (or Unit Production Managers) in our sample, some possessed hard skills prior to entering the business that were either transferable (e.g. Accountancy), or directly applicable (e.g. NFTS Production Management course). However, the many idiosyncrasies of film production required of the majority years of further apprenticeship, with a slow career progression through intermediary grades (e.g. Location Manager, Production Coordinator).

The factor in common to all four categories of interviewees, is how strategically dependent they have been on direct professional experience as a means of raising their skills level to the requisite professional standard, regardless of the kind of prior education and training (and how much of it) they had received. Additionally, many interviewees report being on a lifelong discipline of further skills acquisition, owing to the fast pace of technological change and the constant evolution of managerial techniques.

And the road to a senior job (HOD status) was generally a long one: overall, 46% of career timeline production credits were for job descriptions other than (and lower than) the sampled professionals' current job description. The longest pathways to current grades were for Line Producers and Directors: 69% of the specifically IBF career credits of Line Producers working on an HETV production in 2016 were for grades lower than Line Producer (or Unit Production Manager [UPM]); 54% of Directors' career credits were also on lower grades.

Figure 3. IBF Credits - current role vs other roles

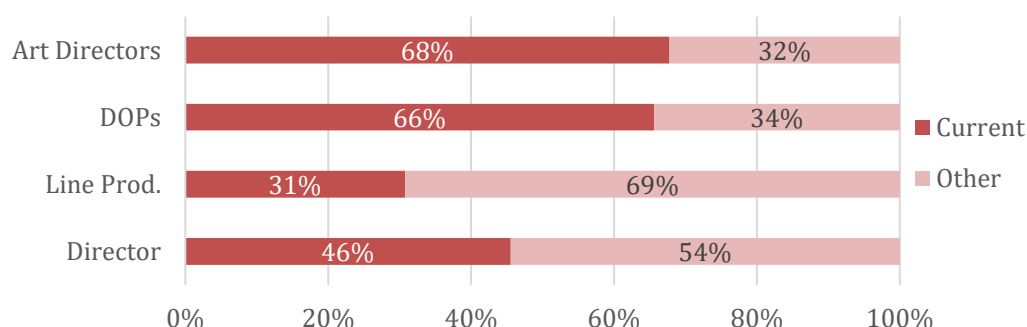
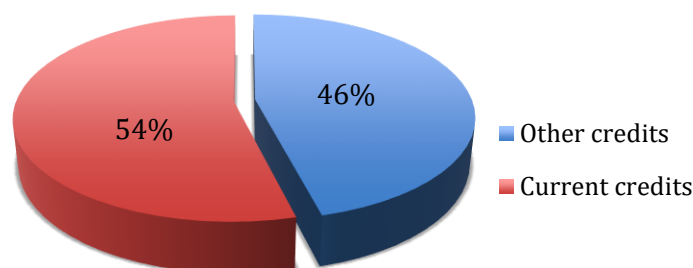


Figure 4 Credits: Current vs other roles – All 4 roles combined



With one exception, all the interviewees reported positive skills' development effects from their experience working on IBFs.

The majority reported experiencing more flexibility in the working methods as compared with television or big-budget films. For example, five of the Art Directors said IBFs were important in providing opportunities to take more responsibilities and hone new skills.

Art Director 3 (AD3)

This Art Director was a fully qualified architect by the time she joined the industry, with a degree from one of the leading universities in the UK. She went on to study production design at NFTS.

She first served an extended apprenticeship under the direction of highly experienced Production Designers in three successive bigger budget UK IBFs. Her breakthrough film was a low-budget art film supported by the old BFI Production Fund. She reports feeling experienced relative to the rest of the crew, many of whom had fewer formal qualifications and even less on-set

experience than herself. She found also that the flatter command structure (compared to the previous films she had been on) presented an opportunity for her to apply fully what she'd learnt so far and to acquire new skills on the job: her responsibilities were stretched to new challenges, including that of drawing up an art department budget for the first time. *'It was a very un-hierarchical, very collaborative process; we all sat in on production planning sessions and the small budget meant I had to take initiatives, be resourceful and inventive.'*

'What drew me into the industry was the desire to make mid-budget indie films. I liked indies. At the time, the scripts were more interesting and I did not want to be a small cog in a big, hierarchical art department, where I'd be confined to doing the same thing again and again.'

AD3's qualitative assessment of the value of IBFs in skills' development is echoed by other colleagues in the same group of interviewees: AD1 pointed out that *'If you're an Art Director on a smaller UK IBF, effectively, you also serve as supervising Art Director, whereas these two functions are normally split on Inward Investment films or HETV. I found the added responsibility teaches me more, especially since you're much closer to the creative team made up of the Director and DOP and can freely exchange with them on both creative and technical issues.'*

Line Producers had similar observations. After a six months course at New York Film Academy and a stint as a Production Runner and Production Assistant in adverts, Line Producer 3 (LP3) was first hired as Production Manager on a teen IBF budgeted at just £350,000. He describes the *'camaraderie on set'*, as a contrast to the cooler atmosphere of advertising industry shoots and says it was a source of apprenticeship in and of itself, with HODs working closely and collaboratively to resolve issues. Like his Art Director colleagues, he also found that the restricted resources forced him to stretch his abilities and learn new skills on the job: *'On my second film, also a low budget British independent, I was hired as the Production Manager, but since they didn't have a Line Producer, these are the responsibilities I took, effectively.'*

Line Producer 5 (LP5)

Line Producer 5 (LP5) went through 15 years of apprenticeship in various grades, from Production Runner to Location Manager, to Production Manager. He has been working as a Line Producer, UPM or 'Co-Producer' for the past 8 years.

LP5 started film career having completed secondary education but chose not to pursue higher education. After early experiences on the set of TV adverts, he started as a Production Runner for a very senior Line Producer of both

film and TV. The next four years saw him develop his skills on high-end TV drama, with job opportunities coming mainly from the same very established independent production company. He progressed from third Assistant Director (AD) to Location Manager. His connection to TV was then interrupted when he chose to go into features. The first project was a mid-budget IBF part-financed by leading US independents, with UK public sector investment. *'The film was a 10 weeks' shoot and we had a lot more prep time than I'd been used to in TV. It was also a big contrast with episodic TV drama in that we were asked to take on a lot more.'* He describes the experience as a career staging post. A stint as location manager on a low budget IBF with a first time Director followed, which he describes as confidence booster: *'The small scale of the film made me realise that I had more production experience than the Producer and the Director; it gave me free rein to apply problem solving skills more broadly than just location work. It gave me added confidence about my ability to run things and project myself onto to the next level of responsibility in my career.'*

Having entered the film sector through work on several IBFs, LP5 developed a strong preference: *'With TV drama, we're looking at up to 10 scripts or more at once. On a feature, we're focusing on breaking down a single script: it's often far more detailed and complex, so more challenging. It stretches our skills further and it's more rewarding.'*

LP5's later career including line production duties on three consecutive films of a US/UK blockbuster franchise. Whilst he is now more or less full time on Inward Investment and HETV projects, he says his career has owed much to IBFs (7 credits, of which 4 in his early career): *'The IBFs I did, all came at a point when I needed more experience; these films gave me the capacity to learn at a relatively lower level of risk as compared to blockbuster films or big drama productions.'*

Three of the Cinematographers also observed that IBFs presented opportunities for them to stretch their know-how, sometimes owing to demands from a Director with little prior experience and in need of technical guidance. DOP 5 says his first hire as DOP on a feature was for a low-budget IBF with a first-time Director: *'I ended up making suggestions regarding scene blocking and the overall look of the film. It was useful in taking me into areas I had not professionally been able to explore before.'*

B.2.3. Impact of Independent British Film on career development

We asked interviewees about the broader impact on their career development of having worked on IBFs at various points in their professional lives. Did these experiences facilitate their career progression and/or support a change of direction that corresponded to their ambition?

The boundary between this line of investigation and the previous one (training and skills development effects of IBFs) is somewhat porous: it is arguable that a positive skills development impact from IBF credits should logically have a positive impact on career development. The interviews demonstrate this is not automatically so: the skills gain from an IBF experience often requires a proactive effort to consolidate into career progression, as in the case study below:

Cinematographer 1 (DOP 1)

This highly experienced Cinematographer was working on one of our recorded 2016 Inward Investment productions, under his current grade. He entered the business 20 years ago.

His prior education was a media course at University, which he says had no direct bearing on his subsequent career. He set off deliberately to become a cameraman and his first hire was as camera trainee on a large US Inward Investment film production. He observes that from that point on, the momentum of his early and mid-career owed much to the professional loyalty of this particular second unit, which had a strong pedigree servicing Hollywood productions in the UK. *‘My entire career was shaped by where that camera unit went next; the early years with them were like a live film school’.*

After 10 years working as Clapper Loader and B Camera Assistant, he got his first break as Cinematographer on a low-budget British action film. He describes the experience as highly formative, an opportunity to apply the skills he’d spent years learning from senior second unit colleagues. The job entailed a sharp pay cut compared to what he had been accustomed to as part of a second unit on Hollywood films, but he saw the film as an opportunity to upgrade his skills: *‘I took the job because there were a lot more shooting days than on the few shorts I had done as Cinematographer (between camera assistant jobs on big films). We had a skeleton electrical department, but I brought over some of the guys from my old unit and their professionalism gave me the confidence to be a DOP on a feature for the first time.’*

Another three years went by before he had another opportunity to be hired as DOP on a feature again, during which he continued to earn a living from the skills he was known for. The film was another IBF and he describes the experience as pivotal for his career development: *'This was a feature project developed in collaboration with other members of my unit on big films. We'd done a few shorts together and concluded that making a single feature would be both more rational than spreading our resources across a number of shorts.'* They also hoped it would be a more visible calling card for their next career moves. He observes that second IBF experience enabled him to experiment far more than he would have been allowed to do on a big film: *'We had a 4 weeks' shooting schedule spread across the year; we could plan flexibly, wait for the best natural light, try out new things. We didn't do much scene blocking before coming on set and had to apply all that we'd learnt elsewhere once we began.'*

This second IBF was a launch pad into the career direction he had aspired to since entering the business 14 years earlier. He says it gave him the self-confidence to take a risk and turn down lucrative offers to work as Camera Assistant on bigger films and begin to market himself as DOP. He has now done so successfully since 2016, with four new Cinematographer credits to his name.

Other interviewees had comparable experiences. Art Director 4 (AD4) found the expectations from her professional network changed after she got her first break into art directing on a prestige arthouse IBF: *'This was my first full credit being an Art Director. It was a big leap in responsibility from what I'd done previously and budgeting was something I hadn't done on that scale before, so it was a challenge. But the risk paid off: after this I was known and accepted as an Art Director and no longer had to compromise on career choices in this respect.'* She also observes that: *'IBF experience allows you to have a "sense of importance" and everyone feels they're contributing because they can see their work on the screen'.*

The majority of the Directors entered the career through TV apprenticeships, and career starts in TV drama, as this was a predominant pathway for people coming into the industry until recently. Whilst some continued to set their career course mainly on TV work, others went into film and often found IBFs to be useful staging posts.

Director 3 (D3)

This Director of high-profile British independent and US studio films began his career in the theatre, where he developed a strong network of relationships with Playwrights and other Directors. Despite an increasingly demanding film career, he has never stopped directing for the theatre. Many of the Playwrights in his original theatre network also developed a dual career and he was able to use these working relationships in his later career to successfully develop IBF projects.

His initial entry into the film industry was via television. Uncharacteristically, his prior experience in the theatre enabled to start out by directing a short three-part drama project under the mentorship of a leading BBC executive. He describes the experience as a *'vertical learning curve.'* He then went on to a BBC Drama course to consolidate his skills: *'The course prepared you for the BBC's soap factory, but I saw TV as a springboard to get into features. The theatre milieu, where I continued to work, was very sniffy about TV in those days, but not about features.'*

His first full-scale IBF was a production for BBC's Screen Two, a 1990s strand which commissioned feature films to be premiered theatrically before going on to a BBC slot. *'The risk on these films was lowered by the BBC's license fee, which was underpinned by a guaranteed network transmission. It gave someone of my generation a chance to work with solid production values and seasoned crew whilst I was still relatively inexperienced. Making my first film in this way was very much a career calling card, made under safe conditions.'*

The network he'd established inside the BBC was helpful later on in opening doors to directing IBFs. Director 3's first IBF was offered to him by a former BBC executive who had established himself as an independent producer. After directing a couple of high-profile US studio-financed projects, he later leveraged his reputation and writers' network to develop and direct a succession of critically acclaimed IBFs.

As someone whose experience has ranged over the years from lower-budget IBFs to studio films and back again, he believes in the importance of IBFs for the overall UK production ecosystem: *'Indie films are essential: if you take out the plankton from the food chain, eventually the entire system collapses.'*

Director 5 (D5) entered the industry after graduating from a UK arts and design college. He returned to Ireland to work for the legendary US low-budget genre film producer and Director Roger Corman, who had set up an offshore studio. D5 trained

on the job and eventually served as Location Assistant. Returning to the UK, he got his first break as a Director on short films financed (and broadcast) through the now defunct Lloyds Bank/Channel 4 Film Challenge. Good reviews attracted the attention of a leading UK independent production and distribution outfit, making genre IBFs. He was offered directing duties on a mid-budget IBF. D5 thinks there was something unique about IBF culture that meant the producers were prepared to take a risk on a young Director with little prior experience. *'It was partly a practical calculation: I was cheaper. But they also thought I'd bring something fresh. Without that attitude, I may have had to have waited much longer to direct a feature'*. According to D5, the experience was a pivotal point, launching him into what later became a dual career in IBFs and HETV: *'They gave me a shot at it and I had a lot of creative freedom. It gave me the confidence to sell myself as a Director from that point on.'*

The assessment of Line Producers regarding career development impact was also predominantly positive. Line Producer 6 (LP6) studied accountancy and financial management at University and worked in financial services until the age of 30. Her first job in the industry was as an Accountant's Assistant on a large-scale Inward Investment film shooting in a UK studio. A year later, she was hired on a low-budget IBF based on a book by a prominent UK writer. The modest scale of the project became an opportunity to move up to Production Accountant: *'The Production Accountant role on this was very instrumental in stepping me up, giving me the added credibility I need in order to eventually fulfil the ambition I'd formulated whilst working on a big film, which was to become a Line Producer. On the IBF shoot, people were given chances to do something they hadn't before so not only did I learn a lot, but I was able to use the experience to pitch for more responsibilities in my next job.'* For the next seven years, LP6 worked mostly on IBFs, with production accounting as her baseline for stepping up to the next stages, progressing to Production Manager and eventually to Line Producer.

Line Producer 2 (LP2) had an early career in market research after a university degree in psychology. She first entered the business as an Accounts Assistant on a low budget IBF: *'I was both an Accounts Assistant... and a Mini-Bus Driver.'* Her first breakthrough was as a Production Co-Ordinator job on a prestige IBF production. *'I didn't know much about what I was doing and for the next 8 years I learnt on the job and almost made up a lot of it as I went along.'* Other than the opportunity to hone her skills, she found the IBF experiences opened doors, the more so as her industry network grew alongside her reputation: *'IBF has been critical to my career. I wouldn't be where I am now without it.'*

Line Producer 1 (LP1) is self-critical about his career and ambivalent about IBF impact on his professional development. He admits that *'with the arrogance of youth'*, he skipped stages in his eagerness to be in charge: *'I made myself a First AD then a Production Manager, without doing the groundwork. My working life being confined to IBFs is in part due to my training deficits.'* He found early success as a line producer on an award-winning internationally financed independent film had hemmed him in and limited his choices in later career: *'People who'd gotten me*

started on low-budget IBFs in the past thought me too high-end for their projects, while studios thought my skills would be “too indie”. I got stuck in the middle.’ However, he also says that he was able to use this unplanned specialisation to his advantage, running a successful later career as a sought-after Line Producer for prestige IBF. Latterly, he has successfully managed a move into HETV.

C. Conclusions

The interview results strongly point to IBFs having contributed significantly to the skills' consolidation and career development of the UK audiovisual workforce over the past 30 to 40 years. We find in particular that **IBFs are often described by professionals as offering a culture of greater informality and flexibility**, as compared to that which prevails on Inward Investment or HETV production sets. Many of the professionals interviewed have found that, as a result, **these films often provided a more spacious and enabling environment within which to stretch their existing skills and experiment with new ones.**

These headline conclusions, when intersected with the results of the quantitative study (which demonstrates that 27% of all comparable long form career credits were in IBF) strongly suggests that **IBFs have historically been a strategic component in helping build sustainable careers and contributing to the overall competitiveness of this specialised workforce.** The fact that all 548 individuals in our quantitative study were holding HOD positions on other (non-IBF) high-budget UK productions in 2016 – and that 73% of them had had some prior IBF experience – supports the conclusion that the existence of the IBF sector has had supportive impacts in other high-end areas of the national audiovisual production output. IBF is by no means the only segment of the overall UK production ecosystem contributing such effects (e.g., shorts and music videos are two smaller segments that would warrant a separate impact analysis). However, this study suggests that it is a very significant contributor.

Whilst the results of the qualitative study were consistent in registering the positive effects of IBF credits, they also revealed a fair degree of ambivalence amongst individual professionals. Interviewees frequently noted that the more informal quality of many IBF sets – a factor sometimes propitious to stretching professional skills and acquiring new ones – often had a corollary negative attached to it: lower-budget IBFs in particular may offer an appealing flexibility and opportunity for professional job promotion, but the fact that the resources are more limited can also occasionally result in crisis-ridden productions with inexperienced crew and management, experiences that may discourage some professionals from seeking more IBFs as part of their career mix. Such observations are convergent with the findings in a 2015 study for Directors UK⁵. The report presented the rise of micro-budgeted IBFs as a mixed blessing for the development of workforce skills and career development.

The report also found that the long gaps between two feature projects (2.7 years on average between first and second film) meant careers would not be sustainable if they had to depend solely on IBFs. Amongst interviewees in our study, several Directors expressed concerns about the long timeline of IBF project gestation and the uncertain

5 See Report for Directors UK by Olsberg•SPI, 'Career Sustainability for Directors in the UK Independent Film Sector' (8 April 2015)

outcome of development, as compared to television drama. As Directors of IBFs are most likely to be committed to projects upstream of production, these dynamics present recurrent risks for them: they will often have to put potentially lucrative job offers on hold while committing to an IBF development as a more speculative choice: Director 3 points out that: *‘The IBF pay is good once you start, but that does not compensate for the unpaid years of development hell.’*

IBFs ability to compete with other sectors on rates of pay is also an issue and appears to have become more acute in recent years: as new well-financed OTT players have entered the content production market, rates on HETV have become markedly more competitive, with budgets rising to match feature film production values. The fact that rates in IBFs may not always have kept up adds to the factors that may contribute to mid-term decline in the employment opportunities that this sector once contributed to the UK’s audiovisual production economy. Relatively low pay rates on some IBFs are also to be set against the highly competitive alternatives available to those working on Inward Investment films: as DOP6 observes: *‘It’s hard to keep the same crew on IBFs as they get paid more on Hollywood films, even as C camera unit crew compared to being A camera on an IBF.’*

Interviewees also observe that the IBF market is changing in ways that are making it more difficult for professionals to find employment opportunities in the sector. DOP3 finds job offers have been slowly drying up for the mid-range projects: *‘I did £4m budget features in my time as an Assistant. However, now it’s a lot of £1m features or massive blockbusters that I won’t get a look in because they’re not in my network. There seems to be fewer projects in between, well-financed, professionally made IBFs where people like myself developed our skills and built up competitive CVs.’* These anecdotal observations are supported by the findings of a 2017 study by Olsberg•SPI for PACT on the evolution of the economic factors affecting IBF production. The report concludes that the IBF sector has lost sustainability since the 2008 banking crisis, with the market tending to polarise between a smaller number of high-end IBFs and a sprawl of micro-budget features made possible by lower cost technologies⁶: *‘[...] only 90 films were produced above £10 million between 2007 and 2015, representing just 3.4% of total production. Production is bottom heavy, with micro-budget projects under £0.5 million dominating output. In total, 1,612 films were produced at this level between 2007 and 2015.’*

The report prompted the BFI to appoint a Commission on Independent Film to imagine a new mix of possible public policy tools and industry initiatives that may help buffer the IBF sector. Its conclusions and recommendations were published in July 2018⁷. In its introduction Independent Film Commission chair Zygi Kamasa wrote:

6 See Study for PACT by Olsberg•SPI, ‘The State of the UK Independent Film Sector’ (27 April 2017), at <https://www.o-spi.co.uk/wp-content/uploads/2017/04/The-State-of-the-UK-Independent-Film-Sector.pdf>

7 See BFI Commission on UK Independent Film, ‘The Commission Report’ (18 July 2018), at <https://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-commission-on-uk-independent-film-2018-07-18.pdf>

‘UK independent film matters: it has the power to promote our diverse and vibrant way of life, influence how the world sees us with stories that celebrate UK culture and ideas and drive the exports of UK plc. All increasingly important as we leave the EU and shape our new place in the world.’

Further on, the report also affirmed that *‘Many of our most valued (and valuable) actors, producers and filmmakers began their careers thanks to the relative accessibility and creative freedom of independent filmmaking and work across independent, studio and television businesses.’*

The present study suggests that IBFs have not only provided career start opportunities but have in fact been an ongoing source of employment and career development for many film professionals over the length and breadth of long careers. The availability of IBF employment options exposed them to a range of professional experiences and helped them build skills that the individuals in our study have gone on to apply successfully to the Inward Investment and HETV sectors.

The audiovisual marketplace is undergoing unprecedented structural change. At its core is a transfer of value on a vast scale from legacy wholesale distribution models into direct business-to-consumer online offers, in an increasingly globalised entertainment content supply economy. In the course of this mutation, the structural vulnerabilities that have affected the UK IBF sector for decades (under-capitalisation, under-investment, fragmented audiences, fluctuating international pre-sales values, etc.) have become exacerbated. The attendant effect could be a continuous decline in both the volume (micro-budget projects aside) and value of the UK IBF employment and output.

The UK audiovisual sectors’ skills agency ScreenSkills’ 2019 Annual Assessment⁸ found there were both significant skills gaps and skills shortages in the UK audiovisual sector. In particular, the Annual Assessment established that the three most acute areas of skills gap were in management skills, leadership skills and project management skills; all three of these are key requirements amongst the film workers surveyed in the present study. Further work is in progress to determine the number of additional qualified workers the screen industries will need in order to service current growth and maintain the competitiveness of the UK workforce.

Looking at this issue from a strategic standpoint, the question arises as to whether the UK audiovisual content production ecosystem can afford to lose its IBF output or to see it shrink into a much-reduced sector, given the sector’s proven contribution to the development of professional skills and competencies. From both a quantitative and a

8 See ScreenSkills, ‘Annual ScreenSkills Assessment: Executive Summary: research by the Skills Forecasting Service 2018-19’ (20 May 2019), at <https://www.screenskills.com/media/2710/2019-05-20-executive-summary-annual-screenskills-assessment.pdf>

qualitative perspective, IBF have proven to be an important component in growing highly skilled local talent, technicians and managers, capable of servicing high-budget projects in other segments of the production industry, especially the HETV £1.173 billion and Inward Investment £1.604 billion projects that jointly delivered an estimated £2.77 billion in UK production spend in 2018⁹.

All the individuals whose career data underpin the present study were working in a senior capacity at the high-end of Britain's screen production output in 2016, our sample year, whether on an HETV project or an Inward Investment film. For many, reaching the level of professional mastery required to service such productions, relied in part on earlier professional experiences with IBF. The loss of IBF production capacity, owing to marketplace concentrations and evolving patterns of screen consumption, would not only be destructive of the IBF sector in its own right (with attendant cultural deficits), but may also have far-reaching negative consequences on workforce development and competitiveness on which the other sectors of UK filmed content Plc. depend for their own sustainable economic success.

9 See BFI Research and Statistics Unit, 'Film, high-end television and animation programmes production in the UK: full-year 2018' (31 January 2019), at <https://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-high-end-tv-animation-programmes-uk-full-year-2018.pdf>

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E. About BSAC and NARVAL Media

About BSAC

The British Screen Advisory Council (BSAC) is an independent, industry-funded body that works to advance the prosperity and enhance the prestige, effectiveness and reputation of the audiovisual and interactive industries of the United Kingdom. As a membership organisation, comprising senior executives from the broadest possible range of interests in the screen sectors, it provides an informed lead on emerging business trends and advice on policy.

Members are senior figures drawn from a wide range of businesses and organisations operating in the film, TV, video game, online and/or mobile sectors. We aim to cover the whole value chain as well as the full range of means of distribution, so include Members who can speak for writers, technicians, independent producers, directors, studio operators, distributors, exhibitors, broadcasters, games publishers, games developers, pay TV platforms and online platforms. This is a unique cross-sectoral mix, with a balance of creative, policy and business specialists.

If you would like to know more about BSAC, please visit www.bsac.uk.com or email bsac@bsacouncil.co.uk

About NARVAL Media

Narval Media Ltd provides strategic advice and advocacy services to national and international trade associations representing the various segments of the audiovisual content industries and undertakes specialised research and studies in this field.

Recent and current clients include IFTA (Independent Film & Television Alliance), FIAPF (International Federation of Film Producers Associations), WIPO (World Intellectual Property Organisation), BSAC (British Screen Advisory Council), the French Ministry of Culture, CISAC (International Confederation of Societies of Authors & Composers), France's Société Civile des Éditeurs de Livres (Project 'Shoot The Book'), the Latin American Training Centre and the UK's National Film & Television School.

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British Screen Advisory Council

'Bringing the audiovisual industries together'



Local Heroes and Inbetweeners:

The Contribution of the Independent British Feature Film Sector to the UK Audiovisual Production Industry

A Workforce Study

Appendices

17 October 2019

Appendices

Appendix I: Quantitative Study: Methodology and Results

Appendix I.1. Methodology

The quantitative study consisted in taking a **sample year – 2016 – and drawing up a list of all the HETV and inward investment projects** that started production in the UK in the course of that year. Next, **we listed the names of every Director, Line Producer, Cinematographer and Art Director that were attached to these 2016 productions.** We then retraced the credits of each of these individuals, spanning their entire careers, to 2018.

We chose to focus on those four particular professional job descriptions because they are amongst the most strategic posts in film or TV production in terms of delivering both artistic and managerial quality. They also tend to be culmination roles in film careers, the roles in which most of those surveyed, as Heads of Departments (HOD), will tend to stay in and consolidate their reputation¹. Their careers as sampled here are – we believe – sufficiently reflective of the competitiveness of the UK film and TV workforce as a whole.

In populating the database, we used two sources primarily: the Research and Statistics Unit at the British Film Institute supplied us with the initial lists of all recorded production starts in HETV and Inward Investment films for our reference year of 2016. BFI records those on an annual basis and has developed a methodology for allocating productions into these two categories, as well as others.

For the addition of the names matching the list of productions, and the career credits attached to each name, we used IMDbPro principally and supplemented (or back-checked) some of its data with CVs and other biographical information available on talent agents' websites and other sources. Whilst IMDbPro makes no claim to being 100% accurate, errors are well within an acceptable 5% margin.

We allocated each credit into one of **5 categories designed for the research: 'Inward Investment', HETV', 'UK TV Single Film', Independent British Film', 'and 'Other types of works'.**

¹ This is, of course, not necessarily always the case, e.g. some Line Producers move on to Co-Producer or Producer roles, some Art Directors may transition to Production Designers and some Cinematographers to Directing.

For the purpose of this study:

- ✓ **‘Inward Investment’ productions** are understood to mean principally those productions developed, controlled and majority financed by foreign companies (predominantly US studios) that locate a significant proportion of their manufacturing cycle in British studios and/or locations and use significant numbers of local crews and talent in the process. Note that for the purpose of this particular study, the shooting of sequences from Indian ‘Bollywood’ films, financed from India and production-managed from the UK, have not been included.
- ✓ **‘High-End TV’ (‘HETV’) productions** are understood to be scripted projects with substantial budgets² made primarily for the broadcast television primetime/evening schedules (and/or online VoD platforms) and of an episodic nature, (typically between 6 and 12 episodes per season). This last distinction is important as we are distinguishing ‘HETV’ from ‘Single TV films’ as two separate categories in this study.
- ✓ **‘UK TV Single Films’** is a self-explanatory category. These are single films (generally feature-length) made primarily for the broadcast TV market and/or VoD platforms. Whilst budgets and production values may be variable, these are distinguishable from episodic high-end TV productions.
- ✓ **‘Independent British Films’ (‘IBF’)** are understood to be films developed and made primarily with a theatrical release as its first market, in the UK, with largely British and EEA cast and crew and/or co-produced films with elements of cast, crew and/or management and financing from the UK, made outside the US studio system of full production finance and control. We acknowledge here the fact that it is notoriously difficult to assess projects for this particular category, especially in view of the historically inter-dependent nature of the UK film industry with that of the US (see below for more notes on methodology).
- ✓ **‘Other types of works’** is understood to mean literally any other credit that could not be ascribed to either of the four main categories. This category contains a huge number of credits (12,249), with the majority being adverts, short films, music videos and lower-end TV productions including daytime and primetime ‘soaps’. It also contains a smaller number of foreign films and HETV productions financed and produced outside of the UK. Credits for these types of productions are not included in the analysis. Their importance to career development is not in doubt. However, in designing this study, the authors took the view that it was reasonable to focus on the 6,595 credits in long form content

2 UK Treasury rules and definitions for the purpose of qualifying projects for the bespoke 25% tax credit specifies HETV as ‘[...] scripted television projects with a minimum core expenditure of £1m per broadcast hour’. However, since our survey analysed credits over a period of several decades prior to the introduction of the tax credit definition in 2014, we had to make judgment calls on TV productions prior to this date, based on the available data sources.

that were broadly comparable to the HETV and Inward Investment projects on which the subjects worked in 2016.

Whilst still relatively crude (e.g. the ‘Other types of works’ category contains a potential wealth of more detailed data), this approach to organising the data had the advantage of yielding a first measurement of the ‘weight’ of UK independent features in the careers of a representative sample group.

We also broke down the independent film credits for each individual, into a tentative time line (early, mid, late career) and added a sub-division between credits corresponding to the professional grade attained by the person in 2016 and ‘other’ credits they would have garnered on previous UK independent films (e.g. someone credited as Line Producer on one of the 2016 productions we surveyed may have spent years progressing from, say, Location Scout to Assistant Director or Location Manager, before eventually making the cut to Line Producer or Unit Production Manager).

The main methodological challenge of this quantitative study was to avoid errors in assigning credits to the various categories we adopted. This, as stated above, was at times especially challenging for the ‘Independent British Film’ category, in view of its great diversity. Our approach to defining these categories was shaped by extensive discussions with the BFI Statistical Unit team. Towards the end of this process, BFI also ran a sample check on our data results, to corroborate their accuracy.

A detailed analysis of our quantitative study results is provided in the subsequent chapter.

Appendix I.2. Analysis of Results

Appendix I.2.1. Note on the professional grades included in the study

Our study of persons attached to UK High-end Television (HETV) production starts for the year 2016 covered 351 individual professionals, distributed across the 4 grades in the following pattern:

- 96 Directors
- 83 Line Producers (or Unit Production Managers [UPM])
- 76 Cinematographers (or Directors of Photography [DOP])
- 96 Art Directors (or Supervising Art Directors [SAD])

Our study of persons attached to UK production starts on Inward Investment productions in 2016 yielded 197 individual professionals, with the following numbers' breakdown for each of the 4 grades:

- 52 Directors
- 44 Line Producers (or UPM)
- 50 Cinematographers (or DOP)
- 51 Art Directors (or SAD)

In total, **the two surveys covered 548 individuals and 18,844 individual credits over a combined number of 11,999 career years**, with an **average of 34 credits per individual** in the study.

The far larger number of individuals in the HETV sample as compared to that for the Inward Investment sample reflects the larger volume of HETV production starts in 2016, a trend that has since remained consistent. Inward investment productions account for the lion's share of investment into UK film infrastructure annually, but the sheer scale of many of those individual productions places a natural limit on their overall numbers.

The reason for the numbers in the 4 professional grades not being the same in each study is due two-fold:

- 1) An asymmetry in the number of duplicates: For instance, whereas only a handful of HETV Directors had more than one 2016 HETV production credit, substantially more Cinematographers (DOPs) did, as did Art Directors. These discrepancies are consistent with the varying length of engagement on productions according to the nature of the job (e.g. Directors are normally fully involved in post-production whereas DOPs are to a lesser extent and Art Directors generally not at all).
- 2) Some productions (e.g. animated features, feature documentaries) did not employ some of the professional grades in our study, especially Art Directors or Line Producers, as the manufacturing process for those differs from that of HETV or live action feature films in general.

The next section of this study consists in laying out the quantitative study results, with comments, where relevant. Note that, **where referring to 'Independent British Films', we have abbreviated to 'IBF'** for convenience.

Appendix I.2.2. Quantitative Study Results (tables and comments)

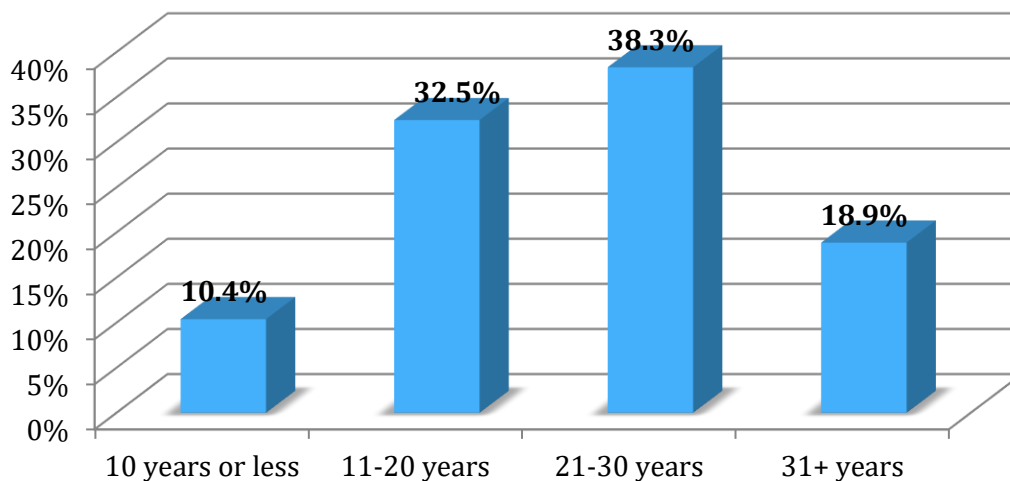
• Appendix I.2.2.1. Levels of professional experience

The two surveys converge in showing a very highly experienced workforce. The average length of career in the HETV grades study is 21.2 years, against 22.6 years for the Inward Investment study group. **49% of the HETV sample group have over 20 years of career**, while only 17% have between 1 and 10 years. For the **Inward Investment** group those figures are **61% and 17%** respectively.

The result is consistent with the choices we made of: a) selecting 4 roles which normally require a relatively long apprenticeship; and b) the nature of the majority of productions in both samples as high budget affairs requiring considerable experience in both managerial and creative roles.

There is a sharp contrast in the percentages of individuals with over 40 years' experience. Whereas there were only 6.3% in the HETV sample, the Inward Investment group result is 19.2%. The result is consistent with anecdotal knowledge that recruitment for Inward Investment films tends to put a high premium on seniority of experience for HODs and Directors alike.

API Figure 1. Career years - combined results



AP.I Figure 1 above shows compound results for both HETV and Inward Investment surveys put together. Individuals with between 11 and 30 years of professional experience make up 71% of the sample. Only 10% have between 1 and 10 years (rounded percentages).

- **Appendix I.2.2.2. Age and Nationality: an incomplete picture**

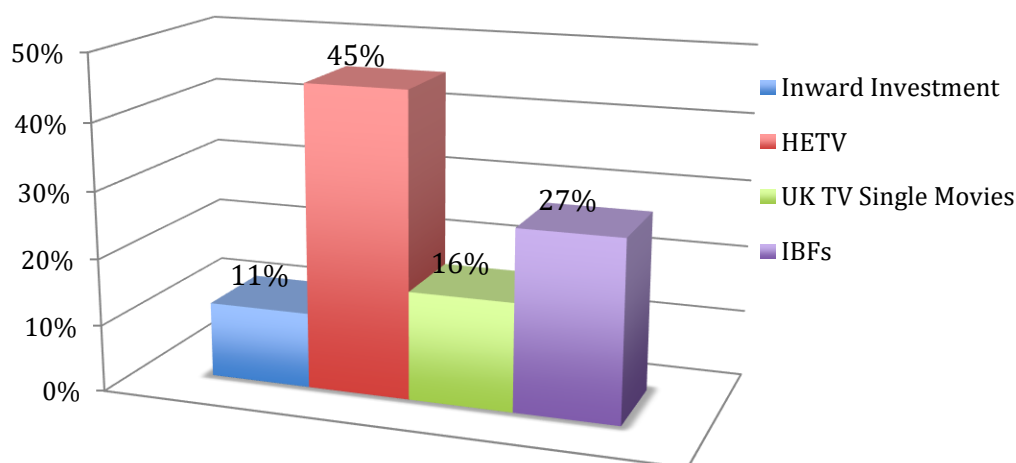
Age and nationality data proved extremely patchy, to the point that the decision was made not to incorporate them in the end tables as they would not have been statistically significant in most cases. Age wise, the only indicative result concerns the Inward Investment Directors, with an average age of 39 years.

Concerning nationalities, **38.5% of the Directors in the Inward Investment sample were UK citizens, with US Directors at the exact same percentage, (38%; 20 credits each).** Sweden was the second largest at 6% (3 credits), South Africa the third largest at 4% (2 credits), Australia, Germany Spain, Ireland, Israel, Poland and Greece fielded one Director each. **This is an overwhelmingly Anglo group, with UK, US, Irish, South African and Australian Directors together making up just under 85%.**

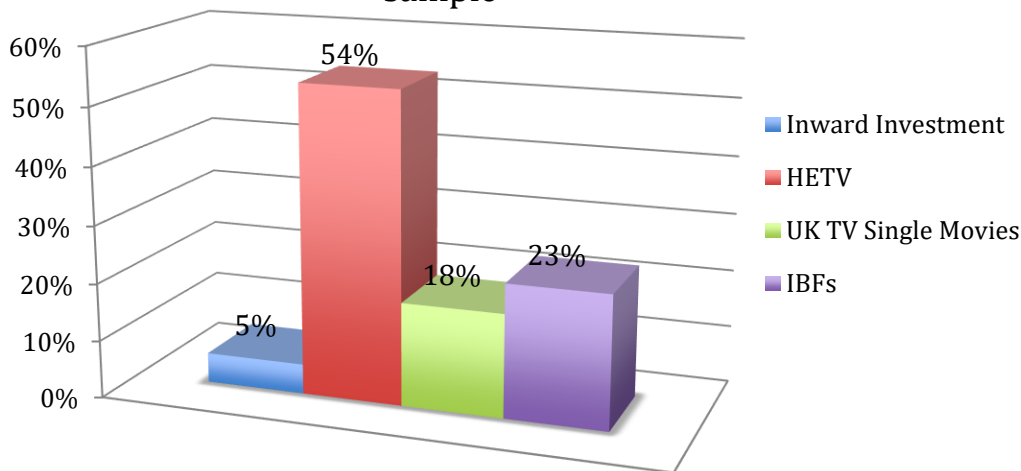
- **Appendix I.2.2.3. Credits by category**

27% of all selected credits across the two workforce surveys combined were attributable to independent film productions. This result is the statistical lynchpin of quantitative study.

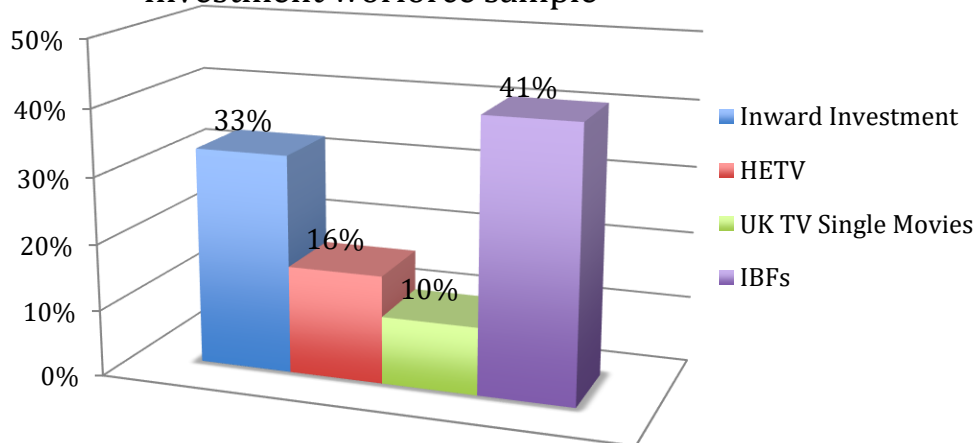
API Figure 2. Credits by Category - Combined Results



API Figure 3. Credits by Category - HETV workforce sample



API Figure 4. Credits by Category - Inward Investment workforce sample



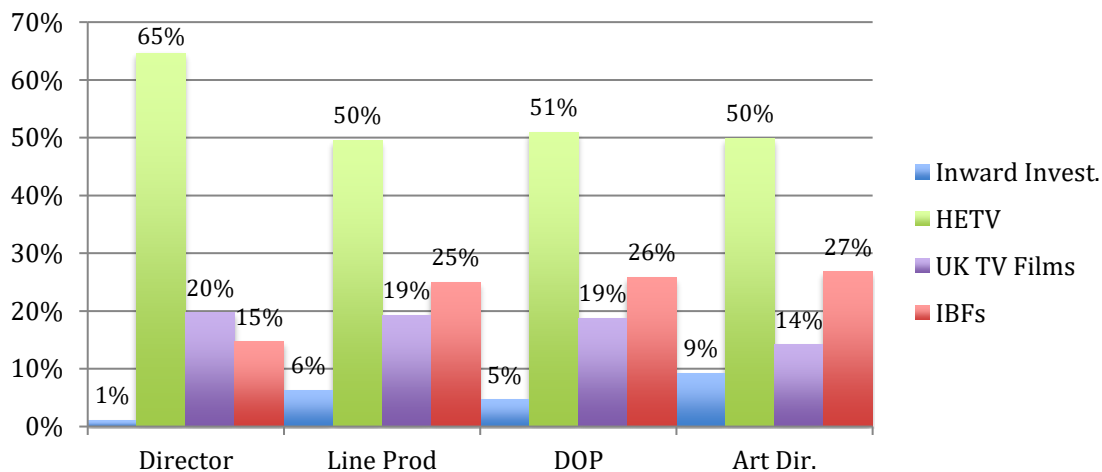
API Figure 4 shows fully **41% of career credits for those who ended up working on a UK-based Inward Investment production in 2016 were IBFs**. This result also suggests a specialisation of the skills' development pipeline, with personnel working on Inward Investment films more likely to have had predominantly film work experience. As with the result on the HETV sample, it suggests two industries (TV and film) functioning in fairly separate career silos during the historical period covered by this study. Again, this is not necessarily a reflection of the current situation with the UK production industry as a whole: anecdotal evidence suggests that the current evolution is towards career pathways becoming more versatile in this respect, due in large part to the considerable increase in HETV employment opportunities, budgets and production values over the past decade.

In marked contrast, AP.I Figure 3 shows that sampled professionals who were working in a HETV production in the UK in 2016 have had only 23% of credits attributable to IBFs in the course of their careers. This result appears to support anecdotal evidence that there has been a high level of separation between inward investment films and TV drama as career pathways during the time span of this study (roughly mid-1980s to 2016).

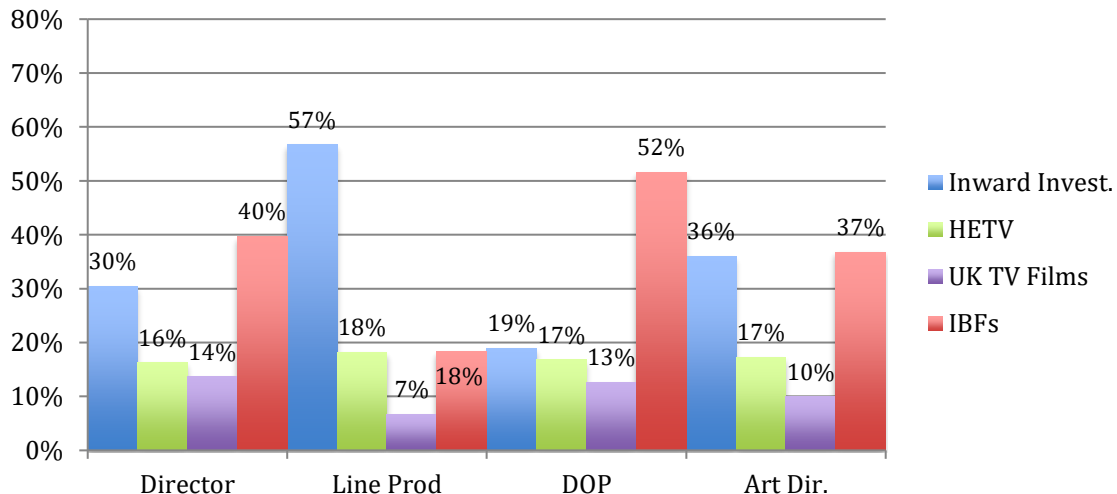
- **Appendix I.2.2.4. Credits by occupation**

AP.I Figure 8 and AP.I Figure 9, below, show important percentage variations between the 4 types of professionals' occupations analysed in the surveys.

AP.I Figure 5. Credits by Occupation – HETV workforce sample



AP.I Figure 6. Credits by Occupation – Inward Investment workforce sample



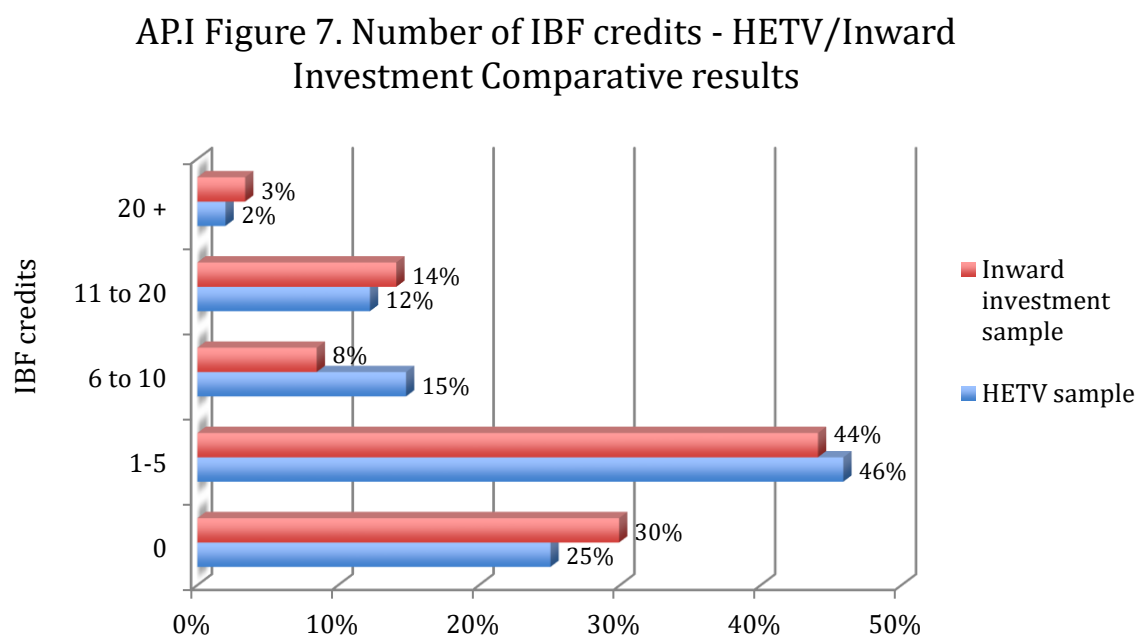
AP.I Figure 5 shows a very substantial proportion of IBF credits for those professionals who were working on Inward Investment films in 2016: 52% of the credits of DOPs engaged on a 2016 Inward Investment production were IBFs, as were 40% of Directors' and 37% of Art Directors. The percentages for professionals in similar grades working on 2016 UK HETV projects (**AP.I Figure 6**) were substantially lower but still significant, with over one credit in four attributable to IBFs for DOPs, Line Producers and Art Directors'. The HETV sample Directors have the lowest IBF credit score, at only 15%.

With 52%, DOPs in the Inward Investment sample have substantially more IBF credits than Directors in the same sample (40%). The result is consistent with industry practice in which DOPs are committed to projects for significantly less time than Directors. As a result, they can simply work on more projects in the same unit of time.

Whilst the Inward Investment Directors' have a very high IBF credit percentage, at 40%, the percentage of IBF credits for Directors who were working on an HETV show in our study year (2016) was just 15%. As with previous tables, these results hint at strong boundaries in career pathways between TV and Inward Investment films, and TV and films, more broadly.

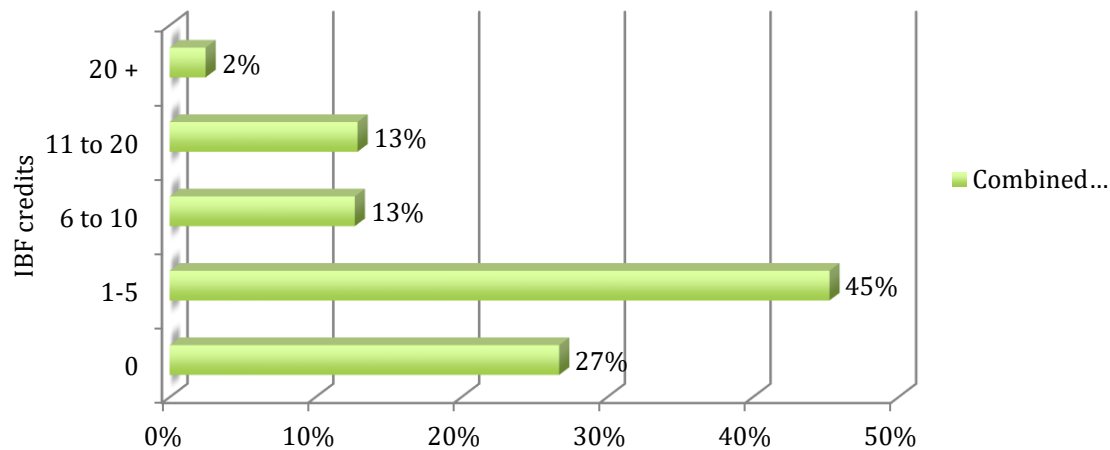
• **Appendix I.2.2.5. IBF Credits by band**

AP.I Figure 7 and **AP.I Figure 8** below breakdown the IBF credits by band (groups of numbers of IBF credits). This was an important exercise in order to determine the spread of a combined total (HETV plus Inward Investment surveys) of **2,350 IBF credits**.



Although there are significant variations between individuals, the distribution of IBF credits is not overly concentrated. **Fully 61% of the individuals in the HETV group have between 1 and 10 IBF credits, against 52% for the Inward Investment group.** Only 5% in HETV have 16 or more IBFs in their career timeline, against only 8% in Inward Investment. **75% of the HETV workforce sample have at least one IBF, against 70% for the Inward Investment group (rounded figure).**

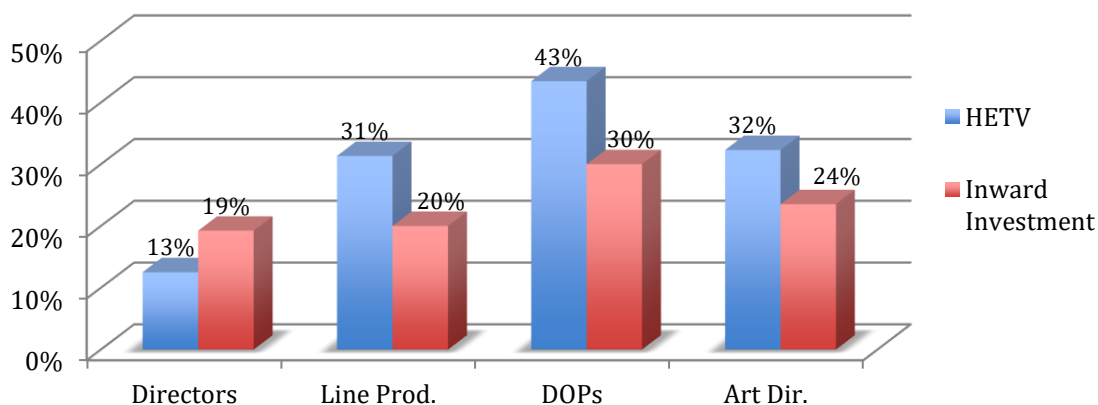
API Figure 8. Number of IBF credits - Combined results



The summary of combined surveys' results is displayed in **AP.I Figure 8** above. **73% of all individuals had at least one IBF credit in their career. 53% had between 1 and 10 credits.** A quarter – 27% – of the overall surveys' groups, had no IBF credit.

Looking at the number of professionals with over 5 IBF credits in **AP.I Figure 9** below, we have again substantial variations in the results between the 4 categories of professionals.

API Figure 9. Individuals by occupation with over 5 IBF credits

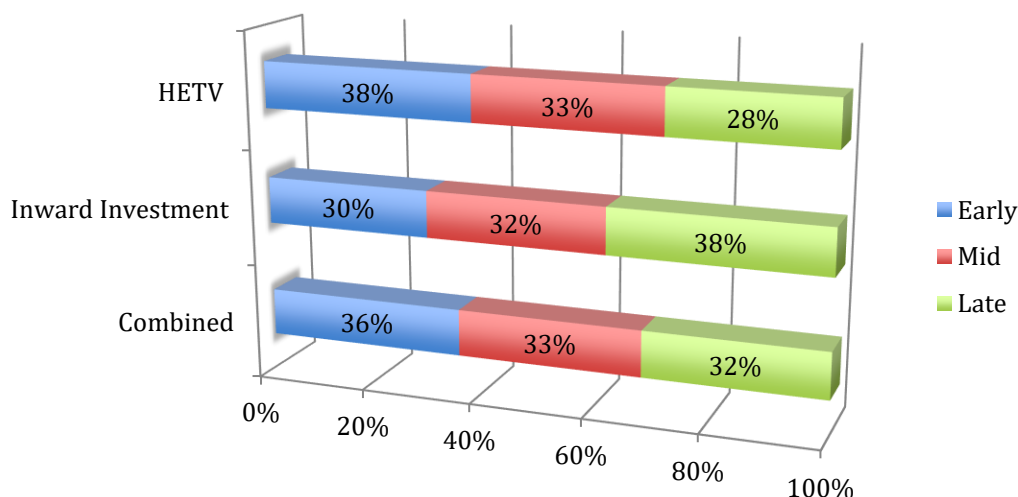


The lowest 5+IBF score is HETV Directors, with only 13%. This is in contrast with the other three professional categories, with over a third of Line Producers and Art Directors having more than 5 IBF credits and 43% of DOPs, whose career versatility was already evident in previous tables. Nearly one fifth of Inward Investment Directors claim more than 5 IBFs, as do nearly a third of DOPs.

• A.II.2.2.6. Placement of IBF credits in career timelines

AP.I Figure 10 gives a picture of the distribution of IBF credits across the career lifespan of each of the sample groups. These statistics were arrived at by effecting a simple division of each individual's career into three more or less equal thirds, using their career start dates.

AP.I Figure 10. IBF credits in career timeline



Whilst careers were variable in length, as noted above, the individuals in the two workforce samples were highly experienced, with the majority having been in the Industry for 20 years and over, so that the notion of early/mid/late career made implicit sense in the majority of cases (i.e. only a few could be said to still be in their early career). Note that the percentages are of the number of IBF credits only, not overall credits.

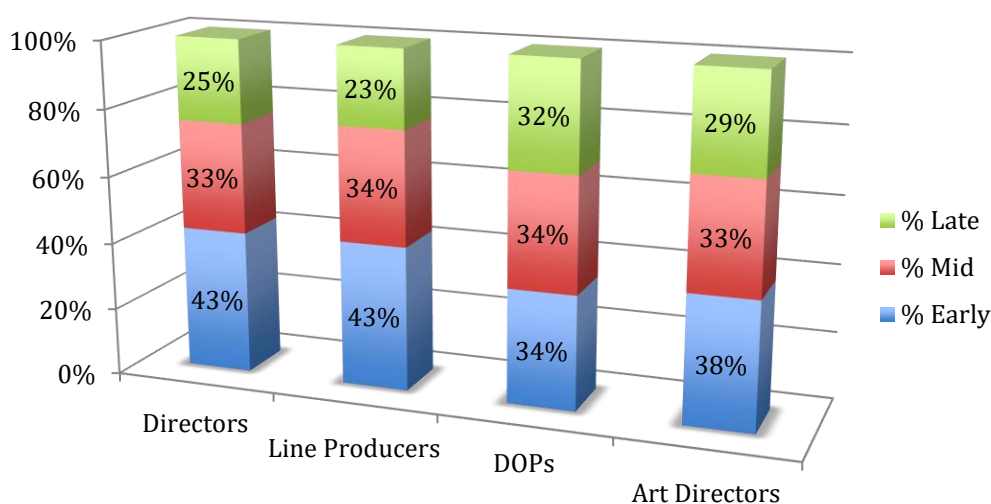
The results for those who were working on HETV productions in 2016 show a decline in the number of IBF credits along the career timeline, with 28% of credits in later career as against 38% in the early part.

By contrast, those who were working on Inward Investment productions in 2016 evidence a steady increase in the number IBF credits across the timeline, with 8% more in the last third compared to the first. This result may suggest a strong correlation between IBF experience and later career evolution towards Inward Investment productions.

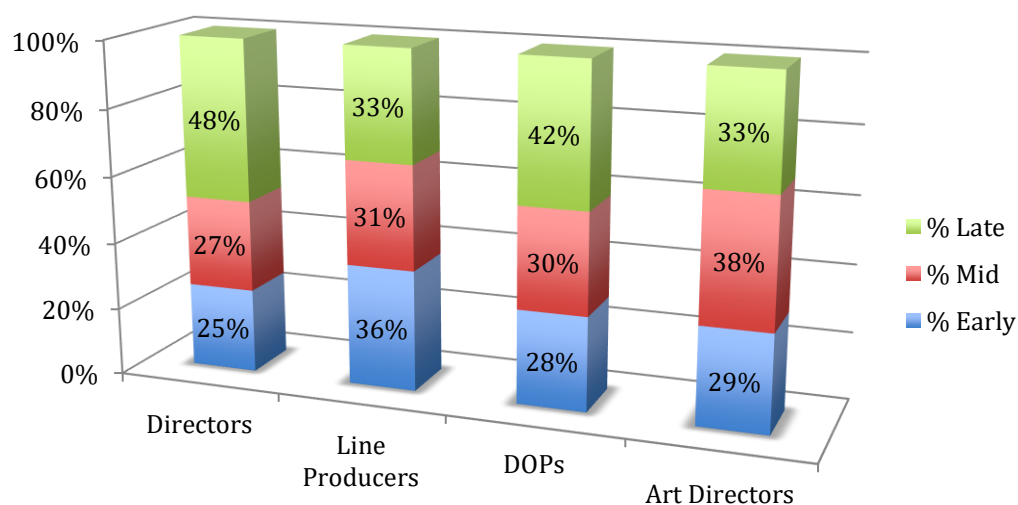
Combined results in **AP.I Figure 10** above show only a **soft decrease of IBF credits across career timelines**. These results are clearly inflected by the fact that the IBF credit drop attributable to the HETV sample is more pronounced than the slight increase attributable to the Inward Investment sample.

AP.I Figure 11, **AP.I Figure 12** and **AP.I Figure 13** provide a read-out of the IBF credit spread for each professional category in each sample:

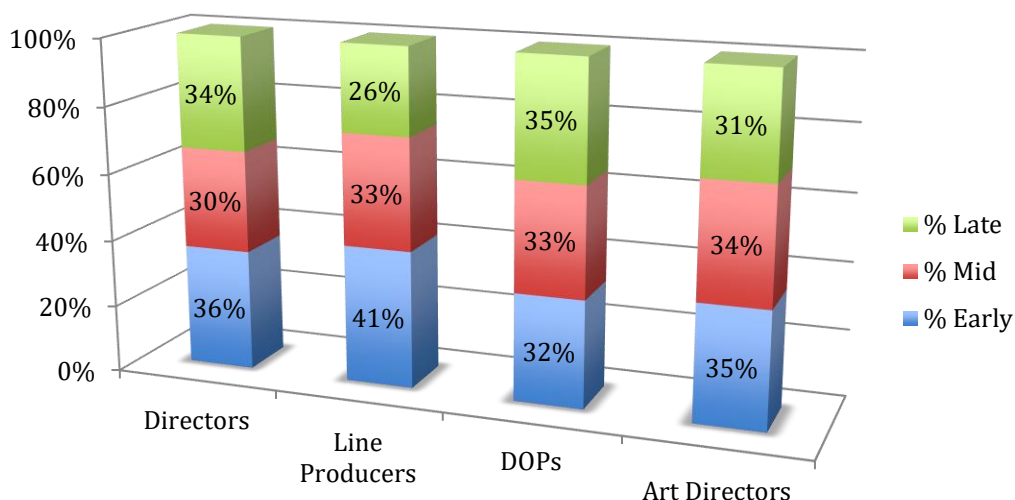
AP.I Figure 11. IBF Credits career timelines by occupation – HETV



AP.I Figure 12. IBF Credits career timelines by occupation – Inward Investment



AP.I Figure 13. IBF Credits career timelines by occupation – Combined results



In AP.I Figure 11 (HETVsample), all four categories evidence a steady but soft downward curve in IBF numbers over time, which is consistent with the trend in the HETV bar within the overall results' figure (AP.I Figure 10) above. The later career IBF drop is steepest amongst Line Producers and Directors. Cinematographers' credits have a more even spread across the timeline.

The timeline of IBF credits for those individuals on **2016 Inward productions** (AP.I Figure 12) presents quite strong variations between professional categories. The **Directors' category shows a strong increase in IBF credits in their later career, with nearly half (48%) of all IBF credits concentrated in that section.** The **Cinematographers' category also shows a sharp increase in later career IBFs** (42% compared to 28% in later career). By contrast, Line Producers' IBF credits are spread relatively evenly and Art Directors' have the largest number of IBFs in mid-career.

The above results seem consistent with some of the anecdotal trends that emerged from the qualitative interviews. For instance, the marked drop in IBF credits amongst the HETV sample group, particularly in later careers, appears to corroborate some interviewees' observations that their move into high-end TV production has often meant passing on new opportunities to work on independent feature films. Interviewees cited factors such as the greater predictability of employment patterns, the longer engagements and – in some cases – the more competitive pay rates.

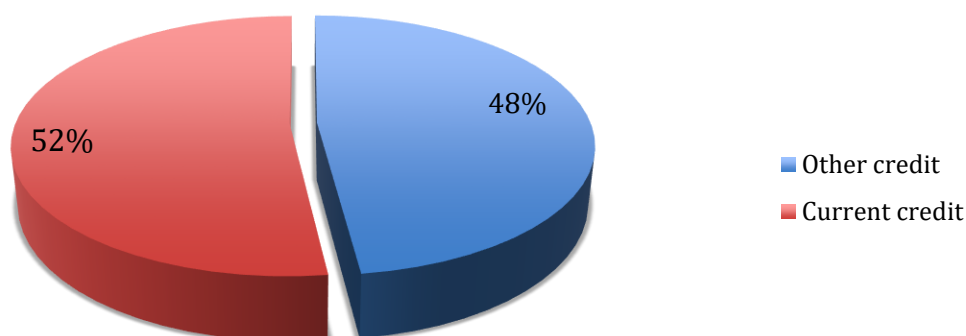
- **Appendix I.2.2.7. Typology of credits**

AP.I Figure 14, AP.I Figure 15 and AP.I Figure 16 show the distribution of IBF credits between the sample group's current job title and 'other' credits.

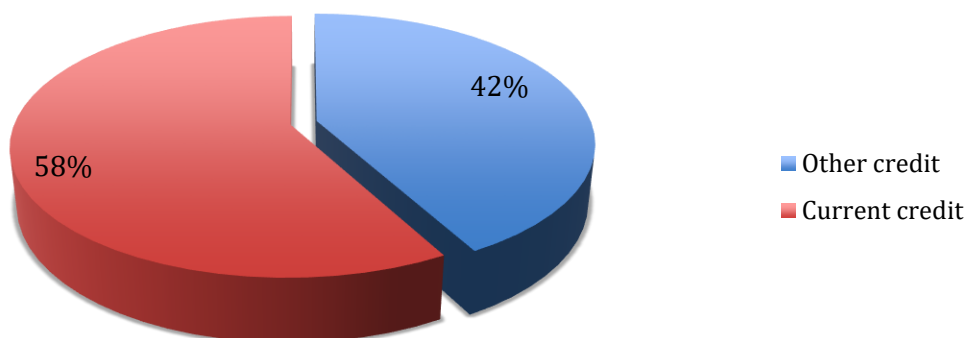
Note: In attributing credits into these two categories, we took into account the fact that the nomenclature of industry jobs is complex and variable, with alternative names sometimes used to describe those in our four categories (e.g. 'Line Producer' and 'Unit Production Manager' can sometimes be one and the same). We ensured therefore that we were led by job description, rather than just job title, to avoid errors.

The percentages relate to the number of IBF credits only, not all the credits in the study.

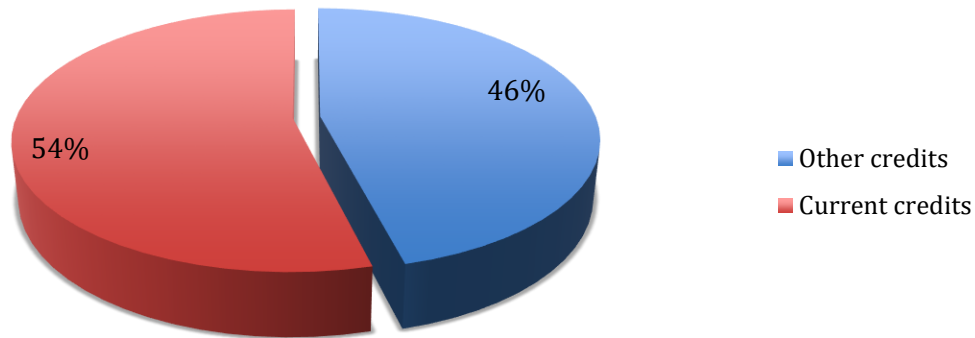
API Figure 14. Career credits - HETV survey



API Figure 15. Career credits:- Inward Investment survey



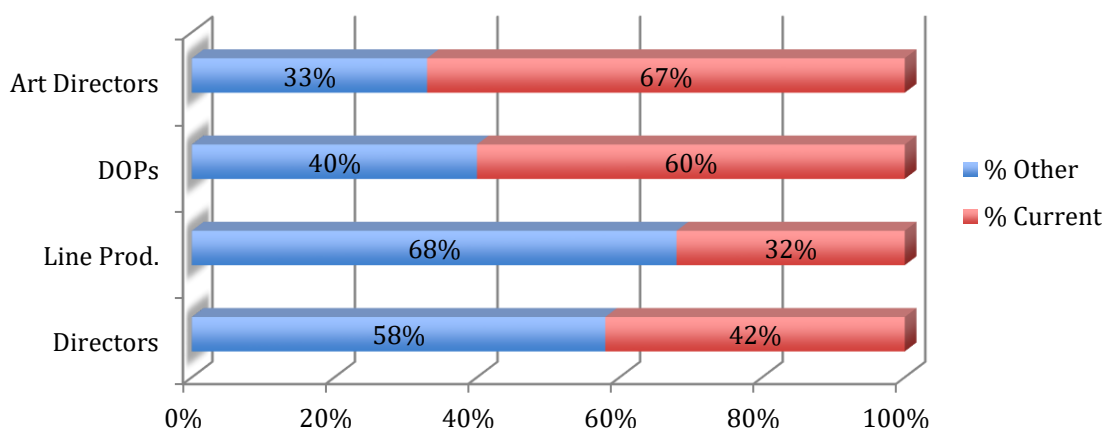
API Figure 16. Credits: Career credits – combined results



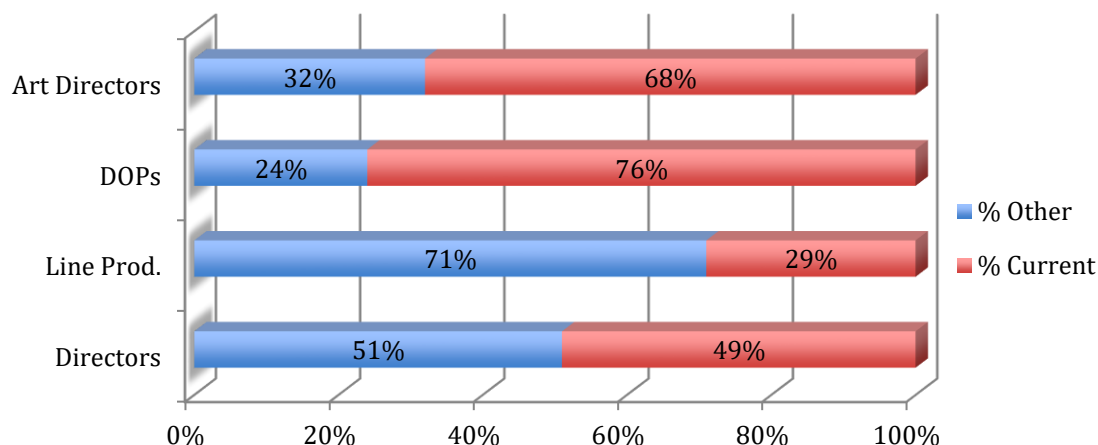
AP.I Figure 16 (above) shows only a very slight majority (54%) of current credits in combined results. 46% of overall career credits are other than the individuals' 2016 job titles. This reflects the findings of the qualitative interviews results (Section II.2. of the Study) which provided evidence of long on-the-job apprenticeship and hierarchical progression patterns, even for those individuals who had strong pre-existing skills prior to entering the industry.

AP.I Figure 17 and **AP.I Figure 18** (below) show the differences in current/other credits' distribution between each occupation in the sample group.

API Figure 17. Career credits by occupation - HETV



API Figure 18. Career credits by occupation - Inward Investment



Cinematographers and Art Directors have the highest percentages of credits under their current grades – 60% and 67% respectively in the HETV study; 76% and 68% in the Inward Investment study – whilst **Line Producers have the lowest** (32% and 29% respectively). This finding is also consistent with the qualitative interviews. Although pathways to Line Producing tend to be very varied (and often informal), interviewees attested to the complexity and range of responsibilities inherent to this job and many had a long apprenticeship through Location Management, Production Coordination, etc.

The proportion of current credits for Directors is also substantially lower than DOPs' and Art Directors', at 42% for those who directed an HETV production in 2016, and 49% for those who directed an Inward Investment film.

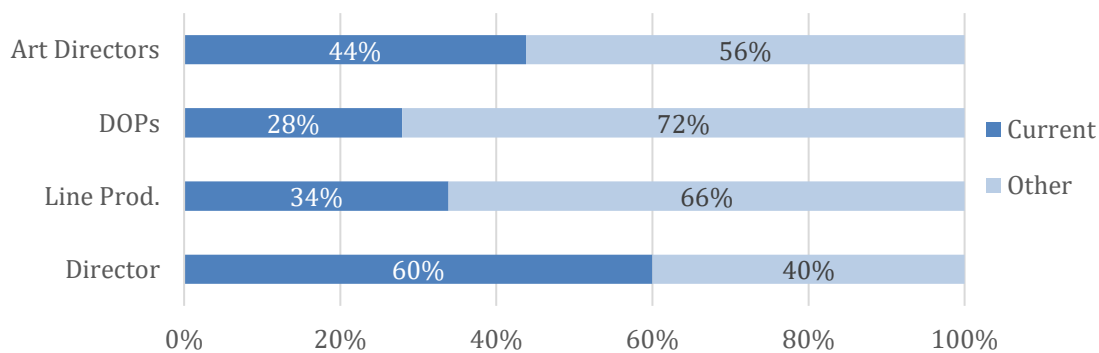
As the data results in **AP.I Figure 17** and **AP.I Figure 18** relate to IBF credits only, the Figures show the sample groups having spent between one third and one half of their employment experiences on IBFs in intermediate posts, in the lead up to their current job titles. This result demonstrates the professional training and career development effects of IBFs, which are assessed further in the next section, through the qualitative interviews.

Appendix II: Career credits in current role vs other roles: Additional figures

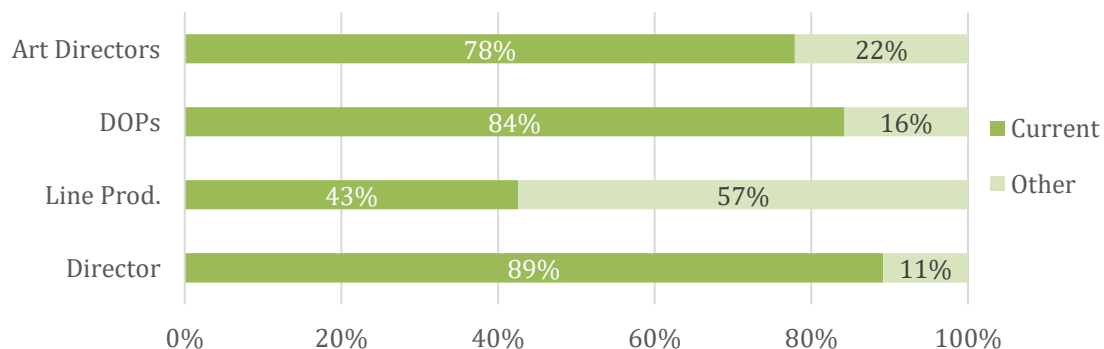
The following figures render the split between the ‘current’ credits of the film workers in our study, i.e. those they held on the HETV and Inward Investment productions they worked on in 2016 (Director, Line Producer, Cinematographer/DOP, Art Director), and ‘other’ credits, that is earlier career credits below their 2016 grade: for example, a Line Producer may have transited through lower grades such as Location Scout and Location Manager in the course of their career.

The tables track these splits for each category of works. So, for instance, **AP.II Figure 3** tracks the ‘current/other’ credits’ split for all credits attached to the category of ‘UK Single TV Films’.

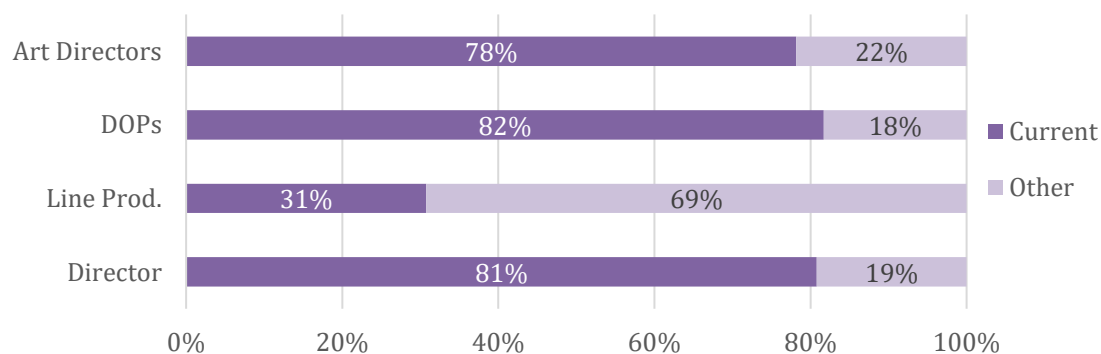
AP.II Figure 1. Inward Investment: Current role vs other roles



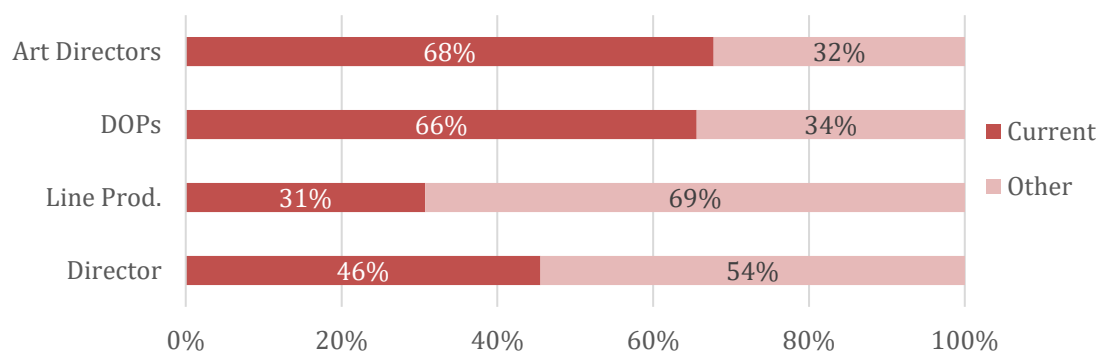
AP.II Figure 2. HETV: Current roles/Other Credits - Combined Results



AP.II Figure 3. UK TV Movies: Current/Other Credits - Combined Results



AP.II Figure 4. IBF: Current/Other Credits - Combined Results



Appendix III: Qualitative Study: Methodology

The quantitative study provided us with a first insight into the place of independent British features in the career arcs of the sample group. However useful such an instrument may prove in measuring sheer aggregates (including career percentages), it fell short of yielding a finer reading of factors such as individual motivation for career choices and the subjective appraisal by the professionals themselves as to the value of the experience they'd gained from working on independent British features specifically, as opposed to other kinds of projects.

We addressed this gap by conducting interviews with selected members of the overall sample. On the basis of the available resources for this project, we have thus far confined ourselves to **32 interviews across all 4 professional categories (8 in each). These were in-depth interviews, lasting anything between 60 to 90 minutes and over. The interviews focused principally on three research questions: 1) how had interviewees entered the business at career outset; 2) what had been the individuals' career trajectories and what motivations had been involved in each of them making certain choices at certain times; and 3) interviewees' own assessment of the impact of having worked on independent UK features.**

Every single member of the **sample group** whose careers we analysed **ended up working in a senior grade (as HOD or Director) on one (or more) high-cost UK film or TV drama production in 2016.** How they got there, and the extent to which their passage on the sets of local independent films helped them get there are, in essence, the two questions this study will have begun to answer.

This study focuses on film/TV employment careers. It is only one of several potential indicators of the contribution of the independent feature production sector to the UK's competitive strength. Other fertile investigative tracks may be considered in future, to help gain a finer understanding of the broader impact of local, British independent film production. They could include measuring the inflow of private investment relating to Independent British Films, an analysis of the sector's impact on the strength of the post-production industry, or a fresh look at the impact of UK independent films' box office hits on aspects of UK tourism. A detailed inventory of potential further research areas initially considered can be found in **Appendix IV.**

This study does not provide a snapshot of the current weight of the UK independent film production sector. Rather, it casts a historical perspective on its role and impact. Tracking the career pathways of a highly experienced workforce from their very start meant in many cases going back well over 30 years; **the study spans the decades roughly from the early 1980s to the present day. The results are influenced therefore by market trends that**

shaped the early and middle careers of experienced, older professionals; many of these trends may no longer be extant in the independent film sector today. For example, undoubtedly the 1990s saw a surge of locally and internationally financed films made with – and by – UK talent, offering a generation of fledgling film workers a range of opportunities that have in part dried out in the economic duress of the past decade, the long range impact of the 2008 market crash and rising competition from HETV.

A historical study has its place in driving strategic thinking about this industry. It is a reminder that specific policies introduced at specific times (e.g. tax incentives) deliver some of their effects decades after they have been introduced.

‘Independent British Film’ is a broad category, encompassing a range of films that are very different in genre, budgets, modes of production and workplace cultures. It is difficult therefore to capture such a wide-ranging reality into a single conceptual framework. However, we observe that as a general rule, an ‘Independent British Film’ possesses features that distinguishes it clearly enough from our other research categories: in comparison to HETV, its mode of production and market destination tends to be distinctive, with longer pre-production and post-production schedules, different aesthetics and hierarchies; in comparison to Inward Investment films, the size of the Budget and scale of production values form the obvious demarcation (though of course, not in 100% of cases). The authors carried out a detailed back-check with the BFI’s Research and Statistics Unit in order to harmonise methodological criteria and minimise inputting errors.

Appendix IV: Potential Areas for further Research

This BSAC research project consists in taking a fresh look at the British independent feature film production sector. The aim is not so much to assess its intrinsic value but to focus instead on how this sector directly and indirectly supports the growth of the wider UK Audiovisual economy and the extent to which it contributes to its competitive advantages.

In an earlier paper outlining the project concept and goals, BSAC drew up a detailed inventory of the data sets and areas of research which would ideally need to be dealt with (we have abbreviated the expression ‘Independent British Films’ into ‘IBF’):

- ✓ Evidence of multiplier factor in the public/private calculus of IBF financing (ratio of private investment for each £1 of public sector underwriting), including foreign direct investment.
- ✓ Evidence of direct production employment accounted for by independent British features (‘IBF’ thereafter) – including qualifying co-productions other than studio-controlled projects (both payroll and self-employed, service companies, etc.).
- ✓ Evidence of contributions to training/apprenticeship volumes accounted for by IBF output in a reference period (2012-2016) – breakdown by skillsets and areas of production.
- ✓ Evidence of studio and facilities rental/occupancy accounted for by IBF in reference period.
- ✓ Evidence of impact of IBF demand on the competitiveness of the post-production and VFX/SFX sub-sector.
- ✓ Evidence of innovative breakthroughs in VFX technology/visual advances accounted for by IBF (e.g. *Monsters* [2010], *Ex Machina* [2015]).
- ✓ Evidence of professional and cultural cross-fertilisation with UK HETV output (e.g. professional provenance/iteration of Screenwriters, Directors, Leads, Principal HODs).
- ✓ Fresh evidence of the impact of IBF international crossover hits on UK tourism and ‘set jetting’ (partial update of the 2006 Olsberg•SPI study for UKFC).

We have established that there are significant current gaps in statistical and research coverage. However, current initiatives are under way by the likes of BFI, Skillset, UK Screen Alliance and NESTA, as well as other institutions and private sector organisations. These are expected to yield very useful additional data that could be processed and re-purposed by BSAC or by other bodies, individually or in concert.

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