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Creative PEC Response to the Culture, Media and Sport Committee's British Film and High-End Television Inquiry

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Executive Summary

In this submission, the Creative Industries Policy and Evidence Centre (Creative PEC) addresses several of the questions posed by the Culture, Media and Sport (CMS) Committee, drawing on our recent and forthcoming research. Our response highlights the important role the UK's Film and HETV sector plays in the UK economy, including its ability to attract significant foreign direct investment (FDI). However, its global standing cannot be taken for granted.

In particular, the Creative PEC's response highlights the following challenges, and outlines policy options for consideration by the committee. These include:

1) Strengthening the UK's R&D Tax Relief Offer to support the Screen sector.

The UK's screen sector is R&D intensive, however the full breadth of R&D activity the sector undertakes is under-supported by the UK's current R&D tax relief scheme. This is because they are more likely to undertake R&D in the arts, humanities and social sciences (AHSS) which are currently excluded from R&D tax relief.

We recommend that the UK Government amends its definition of R&D for tax relief purposes so that it is fully in line with the OECD's Frascati Manual for collecting and reporting data on R&D, which acknowledges the contribution of AHSS disciplines to R&D.

2) Improving the quality of evidence to support the sector to demonstrate its social and civic value.

There is a continued need to support UK cinema venues and the film exhibition and screen heritage sectors to make robust cases for investment in their venues. Research from the British Film Institute (BFI)¹ and Independent Cinema Office² highlights that some UK cinema, multiplexes and mixed arts venues are still struggling post-pandemic.

We recommend that the Committee, and the Government, continues to back the Department of Culture, Media and Sport's (DCMS) Culture and Heritage Capital Framework, to help assess where support is needed. We also recommend that this includes the continued production of resources and guidance materials for the sector on how to use these valuation methods in business cases and appraisals.

3) Tackling challenges to the UK film and HETV's talent pipeline across the education and skills system, including improving the quality of work in the sector

Access to the UK's skilled workforce is a major driver of FDI into the sector, however there are current significant skills shortages within the UK's screen sector. That these affect a wide range of roles in the sector highlights that change is needed at multiple points of our education and skills system.

¹ British Film Institute. (2023). *The UK Box Office: Full Year 2022*. London: BFI. Available from: [Official statistics release calendar | BFI](#)

² Independent Cinema Office. (2023). *The financial health of the independent theatrical film exhibition centre*. London: Independent Cinema Office. Available from: [The financial health of the independent cinema sector - Independent Cinema Office](#)

We highlight several recommendations for consideration by the Committee, drawing on findings from the Creative PEC's *Good Work Review*³ that seek to improve the responsiveness of the Film and TV skills system to industry needs; promote industry-led innovations; improve funding; and giving all workers in the sector, including freelancers, the opportunity to invest in their own CPD.

4) Addressing work quality challenges in the UK screen sector, including for freelancers

Despite areas of good practice, there remain challenges to work quality within some roles in the screen sector, including instances of extremely long working hours, and a high proportion of freelancers in the workforce who can face insecure work and lack of training opportunities. This further impacts on the talent pipeline and exacerbates diversity challenges facing the sector.

5) Increasing socio-economic diversity in the sector, including the representation of people from working class backgrounds.

The UK's screen sector continues to face challenges around diversity and inclusion, whether viewed in terms of race, gender, disability or social class. Our response draws on recent and forthcoming research by the Creative PEC that explores the challenges faced by workers in the screen sector from working class backgrounds, who are significantly under-represented in the sector.

We outline six strategic priorities for consideration to support people from working class backgrounds to get in and get on in the UK screen sector. These include ensuring that socio-economic background is considered in industry diversity initiatives, agreeing an industry-wide approach to measuring socio-economic background in the workforce, and enhancing investment in interventions that support career progression for people from working class backgrounds in the screen industries.

³ Carey, H., Giles, L. and O'Brien, D. (2023) *Job quality in the Creative Industries: The final report from the Creative PEC's Good Work Review*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcdn.com/production/assets/publications/PEC-GWR-Job-quality-in-the-Creative-Industries-v7.pdf>

Submission

1. How attractive is the UK as a global destination for the production of film and high-end television?

- 1.1. UK film and high-end television (HETV) productions are globally recognised, and the country's attractiveness as a global destination for production is reflected in high levels of inward investment. The BFI found that in 2022 combined total spend on film and HETV production in the UK was £6.27 billion⁴, with inward investment delivering £5.37bn, or 86% of combined production spend.
- 1.2. Research by the Creative PEC has demonstrated the significant role the screen sub-sector more broadly (encompassing Film, TV, Video, Radio and Photography) has played in attracting foreign direct investment (FDI). Between 2013 and 2020, it accounted for the third-largest proportion of FDI projects out of all creative industries sub-sectors as defined by DCMS⁵, the majority of which were in motion picture, video and TV production and post-production projects.
- 1.3. As we discuss in later sections, several factors contribute to the UK's global position. These include the competitiveness of the UK's Film and HETV related tax reliefs; public investment in relevant creative R&D initiatives such as UKRI's CoSTAR investment; and globally recognised UK creative talent and educational institutions.
- 1.4. However, whilst the screen sector attracts inward investment from around the globe, data from the Creative PEC shows that it predominantly comes from North America (61% of all FDI projects from 2013 to 2020) and Europe (27%). Only 4% of projects came from India, Japan, China and Singapore over the same time period.⁶ Opening new international markets and ensuring the UK retains its international competitiveness will be key to retaining the UK's global position as a destination for Film and HETV production.

1.a. What are the barriers to maintaining and increasing overseas investment in the sector?

- 1.5. Our response focuses on the types of FDI that have come into the UK screen sector and the motivations behind those investment decisions. This gives us an insight into what makes the UK an attractive place to invest, and by extension where this attractiveness might be at risk.

⁴ BFI. (2022) *Film and high-end television programme production in the UK: full-year 2022*. London: BFI. Available from: <https://www.bfi.org.uk/industry-data-insights/official-statistics-release-calendar>

⁵ Jones, J. and Fazio, G. (2022) *The Nature of Foreign Direct Investment in the Creative Industries*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcdn.com/production/assets/images/Nature-of-FDI-in-the-Creative-Industries-PEC-Discussion-Paper-July-2022.pdf>

⁶ Ibid. p.17.

- 1.6. Our recent report on the nature of FDI into the creative industries found that the majority of FDI projects in the screen subsector were in mergers and acquisitions (51% of 133 projects)⁷, demonstrating the high-value foreign investors place on UK screen sector IP and the quality of creative content generated in the country.
- 1.7. For other kinds of FDI (which includes new, expansion or co-location projects), we find that the following reasons motivate overseas investors to invest in UK screen sub-sector: 69% of projects were motivated by market potential (i.e. access to the size and growth of the UK's market and as a platform to export to other countries); 47% by a skilled UK workforce, and 9% by available government support⁸ (such as the current regime of film and HETV tax reliefs).
- 1.8. This data highlights the importance access to a highly skilled UK workforce and a competitive regime of government support plays in attracting FDI. However, as we discuss further in our response to questions 3 and 6, there are significant challenges facing the UK screen sectors skills pipeline, and reforms that could be undertaken to strengthen the UK's tax-relief offer.
- 1.9. In addition, Creative PEC research has highlighted the extent to which FDI investment in the screen sector is unevenly distributed across the country. London accounted for 70% of all FDI projects between 2013 and 2020.⁹ Despite this, regions outside of London such the North West (6%) and Wales (5%) are attracting significant FDI, and perform even better at attracting FDI relative to the size of their creative industries output compared with the capital.¹⁰

1.b. What are the benefits and challenges of overseas investment for the UK's film-making capacity?

- 1.10. There is a broad economics literature on the positive impact of FDI on host economies, in particular on productivity spillovers.¹¹ These spillovers might arise through backward/forward linkages or via the mobility of labour between foreign and domestic firms, for instance by introducing new technologies or skills to local firms.¹² Further, FDI can change the structure of the domestic economy through

⁷ Jones, J. and Maioli, S. (2023) *The Motives of Inbound Foreign Direct Investors in the UK Creative Industries*. London: Creative Industries Policy and Evidence Centre. P.12. Available from: <https://creative-pec.files.svdcdn.com/production/assets/publications/The-Motives-of-Inbound-Foreign-Direct-Investors-in-the-UK-Creative-Industries-PEC-Discussion-Paper-May-2023.pdf>

⁸ Ibid.

⁹ Jones, J. and Fazio, G. (2022) *The Nature of Foreign Direct Investment in the Creative Industries*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcdn.com/production/assets/images/Nature-of-FDI-in-the-Creative-Industries-PEC-Discussion-Paper-July-2022.pdf>

¹⁰ Ibid.

¹¹ Newman, C., Rand, J., Talbot, T. & Tarp, F. (2015) 'Technology transfers, foreign investment and productivity spillovers', *European economic review*, 76pp. 168–187. [Technology transfers, foreign investment and productivity spillovers \(sciencedirectassets.com\)](https://www.sciencedirectassets.com)

¹² Stojčić, N. and Orlić, E., 2020. Spatial dependence, foreign investment and productivity spillovers in new EU member states. *Regional Studies*, 54(8), pp.1057-1068.

competition effects and generate new jobs or firms from the increased demand for particular goods and services.¹³

- 1.11. The benefits from FDI may however be offset by negative spillovers, arising for example in vertical relationships when foreign firms have greater bargaining power in contract negotiations with domestic firms or through competitive pressures and the crowding-out of domestic firms.¹⁴ Moreover, an over-reliance on FDI can lead to vulnerability from external factors, such as the slowing of UK productions seen earlier this year due to the impacts of the WGA and SAG-AFTRA strikes in the USA. They can also increase competition for talent, exacerbating skills shortages.
- 1.12. As mentioned above, FDI is also contingent on the availability of a skilled workforce. Creative PEC research has shown that the creative industries are currently experiencing shortages in key skills, with the UK labour market failing to match current employer demands.¹⁵ This is partly a supply side issue of education and training, but it is also due to a lack of take up among learners (see our response to question 6).

2. What more can be done to incentivise film and high-end television production in the UK?

2.a. Are the current funding routes, tax credits and governance for the industry fit for purpose?

- 2.1 Film and HETV tax reliefs have provided a significant boost to the sector, with the BFI estimating that the 5 AV tax reliefs contributed £13.48bn in GVA to the UK economy in 2019. Having a competitive tax relief system is central to the UK's international competitiveness for UK film and HETV production and overseas investment.
- 2.2 The UK's screen industries are R&D intensive, however the full breadth of R&D activity the sector undertakes is under-supported by the UK's current R&D tax relief scheme. Research from the Creative PEC found that whilst R&D investment in Film, TV and Radio sub-sectors in 2018 accounted for 2.2 percent of total business expenditure in R&D, the same sub-sector only accounted for 0.3% of R&D expenditure that qualified for R&D tax relief.¹⁶

¹³ Barrios, S., Görg, H. and Strobl, E. (2005), 'Foreign Direct Investment, Competition and Industrial Development in the Host Country', *European Economic Review*, 49.7, pp.1761-84. Available from: [*doi:10.1016/j.euroecorev.2004.05.005 \(sciencedirectassets.com\)](https://doi.org/10.1016/j.euroecorev.2004.05.005)

¹⁴ Newman, C., Rand, J., Talbot, T. and Tarp, F., 2015. Technology transfers, foreign investment and productivity spillovers. *European Economic Review*, 76, pp.168-187.

¹⁵ Carey, H, Giles, L and O'Brien, D. (2023). *Job quality in the Creative Industries*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcdn.com/production/assets/publications/PEC-GWR-Job-quality-in-the-Creative-Industries-v7.pdf>

¹⁶ Bakhshi, H. (2022) *The Art of R&D*. London: Creative Industries Policy and Evidence Centre. P.6 Available from: [The Art of R&D \(svdcn.com\)](https://theartofrd.com/)

- 2.3 Research suggests that the wider creative industries, which include Film and HETV, are not currently able to invest and innovate in R&D to the same extent as other major industries because they are more likely to undertake R&D in the arts, humanities and social sciences (AHSS). We recommend that the Government amends its definition of R&D for tax relief purposes so that it is fully in line with the OECD's Frascati Manual for collecting and reporting data on R&D, which acknowledges the contribution of AHSS disciplines to R&D.
- 2.4 Any change to the definition of R&D in tax relief should be accompanied by supporting policies to ensure that the system remains robust and credible:
- Providing targeted advice to firms with specific guidance, supported by case studies, as to what does and does not constitute qualifying expenditure for R&D within the creative industries, with specific guidance for sub-sectors including in film, television and radio.
 - Targeted training should be given to HMRC tax inspectors on how to distinguish between qualifying and non-qualifying expenditure in the case of R&D relating to film and television, as well as the wider creative industries. To address any concerns regarding fraudulent claims for AHSS R&D tax relief, the government should work closely with the ONS to improve Business Enterprise Research and Development (BERD) data collection.
 - HMRC should also make available R&D tax relief data for the creative industries (and screen industries).

3. What are the issues facing the UK's film exhibition sector?

- 3.1 Our response focuses on the continued need to support UK cinema venues to make robust cases for investment in their venues. UK cinemas bring significant added value to people, places and communities which are not fully captured in market prices. For instance, they act as important community hubs, contribute to pride-in-place, and increase access to culture.¹⁷
- 3.2 The importance of these measures was brought into stark relief during the lockdowns of COVID-19, when hard decisions had to be made about which cultural assets would receive emergency funding. [Data from the BFI shows that in 2022 audience and box office revenues remained below 2019's pre-pandemic levels, by -33% and -26% respectively.](#) Moreover, a [recent survey \(September 2023\) of 157 independent cinema venues by the Independent Cinema Office](#) found that 45% of respondents forecast they would be operating at a loss by the end of the financial year. There is thus a continued need for policymakers and the sector to be able to robustly make the case for support.
- 3.3 Previous Creative PEC research has shown the way in which the Department for Digital, Culture, Media and Sport's (DCMS) [Culture and Heritage Capital \(CHC\) Framework](#) can support how public investment in the UK's culture and heritage capital can be placed on a more sustainable footing. Launched in 2021, it uses cost-benefit analysis techniques endorsed by HM Treasury in its 'Green Book' to

¹⁷ Lawton, R. McSwiney, S. Byrne, A. et al. Measuring the Economic Value of Cinema Venues. London: BFI & Creative Industries Policy and Evidence Centre: Forthcoming

capture the wider social and civic value of cultural and heritage assets beyond what is reflected in traditional measures such as Gross Value Added (GVA).

- 3.4 A forthcoming report co-commissioned by the BFI and Creative PEC provides new valuations of the wider value of UK cinema venues¹⁸, consistent with DCMS's CHC Framework. The report highlights the additional value people ascribe to UK cinema venues and can be used to support policymakers and UK cinema venues in preparing business cases and in appraisals.
- 3.5 The BFI-Creative PEC study focuses on cinema venues programming mainstream film offers. Separate research is needed to capture the range of values that independent and cultural cinema venues bring. For instance, independent venues and distributors can help bring new releases to market that would otherwise not be available to the public, as was the case with [Film Hub South West's support of a regional campaign around the film *Bait* by Cornish filmmaker Mark Jenkin](#). Cross-artform cinema venues like [Watershed in Bristol](#) and [FACT in Liverpool](#) adopt a creative ecology approach, supporting innovation by acting as a creative hub and by supporting R&D programmes with a screen-sector focus.
- 3.6 We recommend that this Committee, and the Government, continues to back the DCMS's CHC Framework, including the continued production of resources and guidance materials for UK cinema venues (including independents), festivals and other forms of film exhibition. In addition, the Government should consider ways of encouraging use of the techniques in business cases and appraisals with the film exhibition sector.

4. What more can be done to protect and promote the UK's screen heritage?

- 4.1 As in our previous response, there is a need for more robust valuation techniques to capture the non-market value of the UK's screen heritage, which spans physical and digital film archives, UK Directors' collections, and archives containing the materials used for UK film production. We highlight two studies that could be built upon.
- 4.2 Previous research by the BFI has applied contingent valuation techniques (asking people to quantify the value they place on a good or service being present, even if they have not themselves accessed it) to their *Britain on Film Project*.¹⁹ The project involved digitising 10,000 pieces of film from the BFI's archive which depicted areas in the UK. Between 2015 and 2021 there had been 81 million views.
- 4.3 [A recent report from Simetrica Jacobs and the Creative PEC](#)²⁰ has also shown that contingent valuation techniques, consistent with the DCMS CHC Framework and HM Treasury Green Book, could also be applied to the digital offers of museums

¹⁸ Ibid.

¹⁹ Fujiwara, D., Lawton, R., and Mourato, S. et al (2021) *A case study on the public value of online public access to film heritage*. London: BFI. Available from: <https://www.bfi.org.uk/industry-data-insights/reports/britain-film-impact-study>

²⁰ Simetrica Jacobs and Creative Industries Policy and Evidence Centre (2023). *Measuring the economic value of museums and galleries digital offers: an exploratory use of contingent valuation techniques*. Available from: [Measuring the economic value of museums and galleries digital offers: an exploratory use of contingent valuation techniques - GOV.UK \(www.gov.uk\)](#)

and galleries, including digital streaming. It has also shown that similar techniques could be applied to digital structure and streaming.

- 4.4 We recommend that the Committee, and the UK Government, support the production of further guidance and materials to support UK screen heritage assets and initiatives to adopt valuation techniques consistent with the DCMS Cultural Heritage Capital Framework, and HM Treasury Green Book.

5. What can the industry and Government do to ensure British film and high-end television can adapt for the future?

5.a. What should be prioritised to ensure a strong skills pipeline and retention in the film and high-end TV industry?

- 5.1 There are currently skills shortages in the UK screen sector, which encompasses film, HETV, other scripted TV, unscripted TV, children's TV and animation, as well as VFX and post-production. The ScreenSkills Assessment 2021 shows that 38% of employers in the Film sector and 36% in HETV are struggling to recruit staff.²¹ The jobs that are reportedly hard to recruit encompass everything from producers and camera operators to costume designers and hair and make-up artists.²² This demonstrates that there is no single education or skills training "fix", but rather that workers need to be supported from formal education and throughout the rest of their careers in order to meet the demands of industry.
- 5.2 Creative PEC's *Good Work Review*²³ emphasises the need to improve the responsiveness of creative industries skills to wider ongoing developments, such as digitisation, the green transition, and demographic changes. Boosting responsiveness is contingent on access to good data, and so one of the key recommendations is to develop a common Labour Market Information (LMI) framework to understand skill gaps and enable credible horizon scanning of trends. This is only possible if the UK government works closely with the devolved governments, educators and industry—encompassing film and TV—to set priorities.
- 5.3 It is important to continue to develop and nurture "traditional" academic and vocational education pathways. Higher education remains an important pipeline for creative talent, with 77% of Film and TV workers falling within the "highly skilled" category.²⁴ Despite this, evidence from the Durham Commission on Creativity and Education showed that between 2015 and 2019 there had been a decline in pupils

²¹ BFI, The National Lottery and ScreenSkills (2021) *ScreenSkills Assessment 2021*. Available: <https://www.screenskills.com/media/4587/2021-06-08-screenskills-assessment-2021.pdf>

²² As above.

²³ Carey, H., Giles, L. and O'Brien, D. (2023) *Job quality in the Creative Industries: The final report from the Creative PEC's Good Work Review*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcdn.com/production/assets/publications/PEC-GWR-Job-quality-in-the-Creative-Industries-v7.pdf>

²⁴ Giles, L. (2021) *How to design a creative higher education system that supports economic needs*. Multiple: Creative Industries Policy and Evidence Centre and Work Advance. Available from: <https://www.pec.ac.uk/policy-briefings/how-to-design-a-creative-higher-education-system-that-supports-economic-need>

in England taking creative GCSEs and A-Levels, including Media/Film/TV studies, which will inevitably affect the pipeline of young people who go on to pursue relevant degrees or further education.²⁵ This will potentially exacerbate existing skills shortages employers are experiencing.

- 5.4 Embedding a lifelong approach to learning and training is vital if both the creative industries and workers are to thrive. Providing personalised support to freelancers—[who make up 36% of the Film and TV workforce](#)—is essential. In particular, workers need financial support in order access the professional development opportunities they need. The [Screen Scotland Development Fund](#) and the [Northern Ireland Screen Skills Fund](#) are good examples of the sorts of schemes that can support film and TV professionals to cover training costs. The *Good Work Review* also gives evidence that professional bodies and trade unions can be effectively leveraged to provide training, pointing to schemes like TUC's [Union Learn Fund](#) (which continues in Wales, Scotland and Northern Ireland) and the [Federation of Entertainment Union Freelancer training](#).
- 5.5 The opportunity to use and develop one's skills for personal growth and career advancement is a key part of meaningful work. However, there is significant evidence that investment in skills and opportunities for professional development in the screen sector falls well below the UK industry average on key metrics. [The Good Work Review](#) found that only 30% of employers in the screen industry have training plans for employees, compared to a 48% UK industry average. Only 48% of screen industry employers provided on or off-job training, again well-below a 61% UK industry average.²⁶
- 5.6 We recommend that the Committee, and the UK government, consider the following policy options outlined in full within Creative PEC's *Good Work Review*²⁷:
- **Improve the responsiveness of the Film and TV skills system by ensuring that learning is future proofed.** This might include: developing a common Labour Market Framework for identifying skills gaps as committed to in the Creative Industries Sector Vision²⁸, increasing funding for employers and educators to work together on curriculum design, and promoting flexible learning.

²⁵ Arts Council England and Durham University (2020) *Durham Commission on Creativity and Education*. Available at: <https://www.artscouncil.org.uk/durham-commission-creativity-and-education>

²⁶ Carey, H., Giles, L. and O'Brien, D. (2023) *Job quality in the Creative Industries: The final report from the Creative PEC's Good Work Review*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcn.com/production/assets/publications/PEC-GWR-Job-quality-in-the-Creative-Industries-v7.pdf> (pp. 80 – 81)

²⁷ Ibid.

²⁸ Department of Culture, Media and Sport (2023). *Creative industries sector vision: a joint plan to drive growth, build talent and develop skills*. Available from: <https://www.gov.uk/government/publications/creative-industries-sector-vision>

- **Promote industry-led innovations in learning and skills to meet the demands of the sector.** This might include: developing transferable micro-credential schemes (perhaps via digital badging) and expanding the range of accredited schemes. Stakeholders should also work to reverse the decline in creative subjects through a joined-up strategy that encompasses educators, industry and academia.
- **Leverage funding for skills development by using industry collective funds using skill levies and sector training funds.** This might include: granting further flexibilities in use of Apprenticeship Levy Funds or scaling up Flexi-Apprenticeship pilots. Attaching contingencies to tax reliefs to incentivise investment in skills and training could also be explored as a policy option.
- **Give all creative workers, including freelancers, the opportunity to invest in their own learning and professional development.** This might include: providing holistic and personalised support for freelancers, expanding flexible professional development funds based on models in devolved nations, and working with the DfE to ensure Lifelong Learning Accounts and Entitlements benefit the sector.

5.c. What needs to change to ensure the industry is supporting inclusivity and sustainability?

Inclusivity

The UK screen industries continue to face a challenge around diversity and inclusion, whether viewed in terms of race, gender, disability or social class. Research shows, for example, that in 2019 only 29% of people working in occupational codes relevant to Film and TV were women, and 91% were White (compared to 87% in the UK workforce as a whole).²⁹ The Creative PEC's response focuses on the particular challenges faced by workers in the screen sectors from working class backgrounds.

5.7 Analysis by the Creative PEC of the Labour Force Survey in 2020³⁰ found that only one in four people working in the screen industries were from working-class backgrounds, compared to 38% of all workers across the UK economy. Class imbalances were found to be even more pronounced amongst creative roles such as 'Art officers, producers and directors', where 61% were from managerial and professional backgrounds (compared to 38% in the rest of the economy).

5.8 There are a range of industry-specific factors that were found to influence the chance of someone from a working-class background entering and progressing

²⁹ Orian Brook, Dave O'Brien, and Mark Taylor (2020) *Culture is Bad for You*. Manchester: Manchester University Press, pp. 60-61.

³⁰ Carey, H., O'Brien, D., and Gable, O. (2021) *Screened out: Tackling class inequality in the UK Screen Industries*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcdn.com/production/assets/publications/PEC-Screened-Out-Summary.pdf>

within the screen workforce. These include: the geography of opportunity, with the majority of roles based in London and the South East; existing demographics of the sector, and industry practices which can include low-pay and insecure work for some roles.³¹ For instance, working hours in the Screen Industries are some of the highest in the creative industries, and far higher than the UK average, with 31% of workers reporting in 2019 that they worked over 50 hours per week.³²

- 5.9 Despite many jobs in the UK's screen sector offering 'good' work, there is still a need to improve the quality of some jobs across the sector. For instance, forthcoming research co-commissioned by Mission 44 and the Creative PEC has highlighted challenges associated with the high propensity of contract work in the sector, which can include fluctuating incomes and financial insecurity, and long working hours at times required by production schedules.³³
- 5.10 The same report outlines recommendations for increasing access into the screen sector for young people from disadvantages backgrounds, including 16-24 year olds from low-income backgrounds. These include:
- Enhancing the current landscape of support, for instance through better sign-posting existing programmes in the screen sector to young people and extending successful place-based diversity initiatives to other regions and cities.
 - Driving systemic change in the way the sector supports underserved young people, for instance investing in programmes that offer career support across all life-stages.
 - Advancing new research to extend our collective understanding, and in particular improving the quality of evaluation within new programmes designed to address the sector's diversity challenges.
- 5.11 Whilst work is already being done by industry and government to address this, including through a range of programmes and interventions aimed at enhancing diversity in the sector, our analysis found fewer programmes that specifically seek to support the in-work advancement and progress of people from working-class backgrounds in the screen sector.³⁴ It further recommends six strategic priorities for increasing socio-economic diversity in the screen sector in a significant and sustained way. These include:
- **Take a holistic and intersectional view of diversity and inclusion** by ensuring that consideration of socio-economic background is considered in

³¹ Ibid.

³² [Good Work Review Job quality in the Creative Industries \(svdcdn.com\)](https://svdcdn.com) (p.29)

³³ Carey, H., Giles, L., Wilks, D., and Collins, A. (2023). *Improving young people's access and progression in work in Film, TV and Games*. Multiple: Creative Industries Policy and Evidence Centre and Work Advance. Forthcoming.

³⁴ Carey, H., O'Brien, D., and Gable, O. (2021) *Screened out: Tackling class inequality in the UK Screen Industries*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcdn.com/production/assets/publications/PEC-Screened-Out-Summary.pdf>

industry initiatives, particularly where gender, race, disability and class intersect, and tailor support to meet need.

- **Agree an industry-wide approach to measuring socio-economic background** and embed this within existing industry diversity monitoring diversity systems alongside ambitious but attainable targets.
- **Catalyse and enable industry leadership on social mobility**, including by providing additional information and resources to support business leaders to increase access and inclusion.
- **Take a pro-active approach to the targeting of careers and inspiration activities by targeting social-mobility 'cold-spots'** and embedding socio-economic diversity within higher education institutions widening participation activities.
- **Enhance investment in interventions that support career progression and advancement** for people from working class backgrounds in the screen industries.
- **Embed diversity and inclusion within the creative cluster growth agenda**, for instance the Phase 2 of the Creative Industries Cluster programme.

Sustainability

5.12 The Creative PEC's response to this question focuses on potential support measures to help the Film and HETV sector to reduce their environmental impact. There is a small but growing evidence base showing the scale of the carbon footprint of film and television production. For instance, the BFI, BAFTA albert and Arup found that the average film production in 2020 with a budget over £50 million generated an estimated 2,840 tonnes of CO₂. It also highlighted the types of activities that had the largest carbon footprint: with travel accounting for over 50% of total emissions and electricity use a further 34 percent.³⁵

5.13 [Research commissioned by the Creative PEC highlights a number of industry-led initiatives being undertaken to address the environmental footprint of film and TV production.](#)³⁶ These include BAFTA albert's online carbon calculation tool, and the requirement for mandatory carbon reporting from funders such as the BFI and Creative Wales.

5.14 We recommend that further support for the Film and HETV sector to reduce its environmental footprint should, where possible, build on existing industry initiatives. Areas where government support could play a role include: supporting

³⁵ BFI. (2020). *A Screen New Deal: a route map to sustainable production*. London: BFI. p.12. Available from: [Sustainability | BFI](#)

³⁶ Bop Consulting & Julie's Bicycle (2020) *The Creative Industries and the Climate Emergency: The Path to Net Zero*. London: Creative Industries Policy and Evidence Centre. Available from: <https://creative-pec.files.svdcn.com/production/assets/publications/PEC-Creative-Industries-and-the-Climate-Emergency-The-Path-to-Net-Zero-PEC-Research-Report.pdf>

the development of standardised carbon measurement frameworks and guidelines on best practice, working with industry; developing improved guidance and incentives to support the re-use of production materials and sets; exploring

how existing industry-led training initiatives can be up-scaled, for instance through co-hosting on government and industry platforms like the Climate Business Hub.

About Creative PEC

The Creative Industries Policy and Evidence Centre (Creative PEC) supports the growth of the creative industries in the UK and internationally through the provision of authoritative research and policy advice. Funded by the Arts and Humanities Research Council, and hosted by Newcastle University with the Royal Society of Arts, Creative PEC works with policymakers and industry to enable a thriving sector that plays a central role in generating growth and innovation. Our research is led by consortium partners at Newcastle University, the University of Sheffield, the University of Sussex, and Work Advance.

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