Impact evaluation of The Bottle Yard Studios

Prepared for: Bristol City Council and West of England Mayoral Combined Authority

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Table of Abbreviations

Abbreviation	Explanation
BCC	Bristol City Council
BEC	Bristol Energy Co-op
BFO	Bristol Film Office
FBC	Full Business Case
IF	(West of England Mayoral Combined Authority's) Investment Fund
LEF	Local Evaluation Framework
LEV	Local Economic Value
MCA	West of England Mayoral Combined Authority (Bristol, South Gloucestershire, and Bath and North East Somerset)
MSMEs	Micro, Small and Medium-sized Enterprises
NEF	National Evaluation Framework
OBC	Outline Business Case
PV array	Photovoltaic array (i.e. solar panels)
SLEV	Social & Local Economic Value
SMEs	Small and Medium-sized Enterprises
SV	Social Value
TBY1	The Bottle Yard Studio at Whitchurch Lane (the original site)
TBY2	The Bottle Yard Studio at Hawkfield Business Park (the new site)
TBYS	The Bottle Yard Studios (refers to both sites or the business)
WDP	Workforce Development Programme
WoE	West of England (MCA and North Somerset)

Key Facts

- **Studio occupancy days at TBYS nearly doubled following the opening of TBY2**
  Studio occupancy days (including prep, principal photography and strike days) increased from a range of 561 to 598 in 2020-21 and 2021-22 to over 1,000 in both 2023-24 (1,126 days) and 2024-25 (1,075 days).
- **Film and TV production spending at TBYS more than tripled following the opening of TBY2**
  The annual value of local spending due to film and TV production at TBYS increased from £6.3 million in 2020-21 to £22.8 million in 2024-25.
- **TBYS has been an engine of job creation and GVA for the region's economy**
  The additional annual employment generated by filming at TBYS increased from 57.6 FTEs in 2020-21 to 173.9 FTEs in 2024-25. The annual GVA impact for the region increased from £4.2 million to £15.3m over that same period.
- **The opening of TBY2 has also helped boost location filming across the West of England**
  The annual value of local spending on location filming in Bristol rose £11.1 million in 2022-23 to a record £23.8 million in 2024-25.
- **Award-winning TBY2 expansion successfully established**
  The addition of the high-quality soundstages at TBY2 allowed the combined TBYS campus to host at least 15 HETV productions annually in 2023-24 and 2024-25.
- **Most sustainable film and TV studio in 2025-26**
  TBY2 was one of the first studios to be awarded BAFTA albert Studio Excellent accreditation and was acknowledged as the highest performing studio of the year (score of 97%) of all studios participating in BAFTA albert Studio Sustainability Standard 2025-26.
- **TBY1 upgraded**
  Improvements to infrastructure through essential upgrades and renewal works, ensures continued viability of this site's cost effective studio offering which has come to be relied upon by low-medium budget productions.
- **Twin hub for both foreign inbound and domestic production**
  TBYS now delivers a twin offer: TBY1 provides a much valued and now improved hub for domestic broadcaster scale productions; TBY2 provides an HETV offer that hitherto did not exist in the West of England or the wider South West.
- **Industry responsiveness coupled with local social impact**
  TBYS is managed by professionals with an industry background, even though it is a Local Authority initiative. As a result, TBYS management operates at the speed that the film and TV industry absolutely requires, whilst being able to use some levers that provide the opportunity for inclusive growth, across the West of England, particularly in South Bristol.
- **Exemplar skills development programme for WoE residents**
  The All Set West initiative based at TBYS provides bespoke education and training support to new entrants from diverse socio-economic backgrounds, ensuring that productions can access a 'set-ready' pool of talented local residents.

1. Introduction

The Bottle Yard Studios (**TBYS**) is a film and TV production facility wholly owned and managed by Bristol City Council (**BCC**). In existence since 2010, it is the largest dedicated film and TV studio facility in the south west of England and a cornerstone of Bristol's UNESCO City of Film status and the West of England (**WoE**) region's position as the third largest media hub in the country.[1]

The establishment of TBYS has provided a facility for predominantly fiction production in Bristol as well as acting as a creative hub hosting small and medium-sized enterprises (SMEs) offering production services on-site.[2] In partnership with BoomSatsuma TBYS has hosted post-16 Media Production Diploma of craft skills in film and TV production since 2017. It also hosts and co-delivers the All Set West initiative, which launched in 2025 following a yearlong pilot (Workplace Development Programme), to help people from underrepresented backgrounds across the WoE gain, skills, confidence and industry experience needed to build careers in film and television.

In 2021, TBY secured approximately £13.5 million of funding to further invest in the studios, with the objective of increasing Bristol's ability to meet the growing demand for production space and attract even more production activity to the city and wider WoE region.

BCC in partnership with the West of England Mayoral Combined Authority (**MCA**) commissioned an evaluation to assess the economic impact and benefits of the investment in TBYS and a wider situational evaluation of TBYS including skills development within the WoE region.

1.1. Context

At the time that this intervention was proposed (2021), the Bristol Film Office (BFO) and TBYS in the period 2010-2020 had assisted film and TV production worth more than £153.5 million of inward investment across the region – an average total of £15.4 million per year. BFO had also been working with Invest Bristol & Bath to attract further production companies and related businesses to the area.

At the time, film production spend in the UK had increased by 24% in the five years to 2021-22. However, the growth engine of the film and TV sector in the UK had been high-end television (HETV) production, rather than film. In the five years to 2021-22, HETV production in the UK had increased by a remarkable 93%. The last financial year prior to this intervention (2021-22) had seen an increase of £200 million in the annual value of HETV production in the UK in just 12 months – the highest of screen content production in the UK since records began. All indications were that this growth pattern was set to continue and that there would be a significant demand for crew to service these productions, both for studio and location filming.

[1] For the purposes of this report the West of England (WoE) region comprises the MCA jurisdiction of Bristol, Bath and North East Somerset, and South Gloucestershire, as well as North Somerset.

[2] As of September 2026, there are 19 SMEs on site other than TBYS itself.

Bristol is well situated as a base for production companies wishing to film both in a studio or location environment, with an extensive choice of locations available in the city and the wider WoE region. Any growth in production of HETV, both at TBYS and on-location would only increase exposure for the region, generating more income for local councils and businesses, and further raising the region's profile as a popular screen tourism destination.

The WoE region has built a strong reputation for its creative sector, particularly film and television, such that Channel 4 as part of its '4 All the UK' regional strategy, opened one of its two Creative Hubs in January 2020 in Bristol and Netflix as part its 'Grow Creative UK' flagship programme to support the careers and training of up to 1,000 people across the UK, committed to the WoE[3] [4] [5] And more recently, TBYS landed the WoE's first Apple TV+ production, *Down Cemetery Road*. It is the home of globally recognised leaders in natural history filmmaking and animation, with the BBC Natural History Unit and Aardman, respectively, at the heart of their respective value chains and around which their sub-sectors nucleate.

TBYS is the largest dedicated film and TV studio facility in the south west of England. Over the period, 2016 to 2020, it supported c. 90 full-time equivalent (FTE) jobs per annum. In 2019-20, TBYS facilitated c. £13 million in direct expenditure on film and TV production by organisations operating in the sector.[6]

Since the conception of the intervention, the UK domestic screen production sector first underwent a post-Covid-19 bounce-back in 2021 and 2022, which was followed by a period of increased financial discipline in line with the global film and TV industry. This was followed by the increase in interest rates in late 2022, and the Hollywood writers' and actors' strikes, running from spring to autumn 2023. In general, both of these wider macro factors had a negative effect on the overall demand for studio space in the UK in 2023 and 2024 to a lesser extent.

1.2. Rationale

TBYS is located in South Bristol, which has pockets of deep and longstanding deprivation, including 13 neighbourhoods which fall within the most disadvantaged 5% nationally in the Index of Multiple Deprivation 2019. The 10 most deprived neighbourhoods in Bristol are all in South Bristol, with income, employment, education, skills, training, health and disability being particular issues. Many of these issues are strongly linked to persistent unemployment.

To address some of that deprivation, the MCA had committed to the development of at least 1,400 new homes at Hengrove Park (also funded with Investment Funds). The existing TBYS site (TBY1) was situated adjacent to Hengrove Park. The lack of soundproofing in some of TBYS's older buildings would have meant that during the initial construction of the housing estate, four of TBY1's stages would have been rendered inoperable, and then a further two would have been inoperable later in the construction period. This would not only have reduced Bristol's ability to continue to attract economically beneficial

[3] Channel 4. *Channel 4 Creative Hub in Bristol opens for business*, 16January 2020.

[44] Netflix, *Netflix Launches New Training Programme to Develop Next Generation of UK Creatives*, 14 September 2021.

[5] Anna Mallett, *How Our Local Productions Are Supporting Creatives Across the South West of England*, Netflix, 4 November 2021.

[6] West of England, Full Business Case, Scheme: Bottle Yard Studios - Hawkfield Business Park

film and TV productions, but would have threatened the financial viability of the Council-owned TBYS business itself.

At the same time there was a recognition that there was a lack of specialised studio facilities and skills to meet the exponential growth in demand from film and television productions in the UK and that under the National Evaluation Framework (NEF) 4A for Investment Funds, there is a rationale for investing in affordable technically-specialised facilities to enable the growth of start-ups and scale-ups.

Therefore, the acquisition of the new site at Hawkfield Business Park (which later became known as TBY2) was proposed to address both the impact of housing construction at Hengrove Park and the need for specialised facilities. Furthermore, the original TBY1 site had (and continues to have) an ongoing need for remedial works to ensure that it could continue to offer a competitive facility, given the age of its buildings and the fact that it is not a purpose-built studio facility.[7]

The second site was expected to not only provide new capacity to mitigate the loss of stages at TBY1 during the housing construction, but would have also provided additional capacity but of a higher specification, for continued usage after the housebuilding period at Hengrove Park was complete. This would have led directly to an expansion of film and TV production space availability in Bristol and therefore offer the potential to increase jobs and gross value added (GVA) generated by film and TV production in the region.

However, certain assumptions were made:

- That the impact to TBYS of not completing this project would be significant;
- That there would be ongoing need for screen production space throughout the housebuilding period at Hengrove Park, and enough need for increased capacity subsequently; and
- The business case detailed that utilisation of TBYS was at approximately 70%, so a significant reduction in capacity would impact its ability to deliver current undertakings.

At that time, there was difficulty securing studio space in the UK, suggesting that if built the additional stage capacity would be taken up. Subsequently, the screen sector was nationally identified as a key growth area with a strong potential to significantly assist economic recovery from the COVID-19 pandemic. At TBYS, this was reflected in the significant post-COVID demand for stage space, with some production companies seeking to secure studio space for periods of up to five years in advance.

With the new government in 2024, the UK's creative industries, including the film and TV production sector, have remained a key element of the Modern Industrial Strategy. The latter included the Creative Industries Sector Plan supporting creative growth across the whole of the UK.

[7] TBY1 is a conversion, as its name implies, from a bottling factory.

This intervention was designed with the following objectives in mind.

1. Growth of screen production to support economic recovery for South Bristol within the Bristol One City Economic Renewal and Recovery Strategy.
2. Delivery of economic and social benefits to the residents and businesses in South Bristol.
3. Maximising the efficiency of employment land: i.e. intensify employment on the Hawkfield Business Park site, in line with its industrial- and warehouse-use designation in the Bristol local plan.
4. Support a targeted Workforce Development Programme (WDP) focused on HETV skills and targeting development of new talent as a pilot for future targeted skills development.

1.3. Intervention

The intervention sought to support employment and business growth through the delivery of additional film and TV studio space in the Hawkfield Business Park to support TBYS during the disruption caused by the Hengrove Park housing development and to subsequently provide additional stage space capacity in the longer term after the Hengrove Park development was finished. A full business case (FBC) was prepared. Both this intervention and that of the Hengrove Park housing development, were funded through the West of England Investment Fund (the "Investment Fund").

The intervention consisted of:

- the purchase of a site at Hawkfield Business Park;
- the conversion of the building on that site to film and TV studio spaces (referred to as TBY2 in this report); and
- a renewal and repair programme at the original TBYS site already in operation on Whitchurch Lane (referred to as TBY1 in this report), to maintain and grow existing screen production and income generation.

The Hawkfield Business Park site is half a mile from the main TBY1 site, both of which are located in a key regeneration area identified in Bristol's Local Plan: the South Bristol Regeneration Area (SBRA). The SBRA contains 22% of the total population of the City of Bristol or 8.8% of the total population of the WoE.

The conversion works at TBY2 consisted of the conversion of an existing building by sub dividing the internal space into three film and TV studio stages, including demolitions, new partitions, external access and new mechanical and electrical (M&E) services. The use of the site as a film studio was compliant with the existing planning use class.

The renewal works at TBY1 covered emergency lighting and drainage works, roofing works, new rigging infrastructure, building refurbishment projects, drainage infrastructure upgrades, access, security and fire safety, acoustic infrastructure upgrades, electrical upgrades, IT hardware upgrades and works to improve accessibility/inclusivity.

The timeline in the Monitoring and Evaluation Plan for the intervention indicated that the tendering process was due to start in April 2021 and conclude in June 2021 with the appointment of a contractor and a specification of works. Construction work at TBY2 was due to start in October 2021 and renewal works at TBY1 in 'autumn' 2021. The Local Evaluation Framework (LEF) indicated that the construction of TBY2 would be concluded by summer 2022 and be operational by the end of that year (November 2022).

The end date for the TBY1 renewal works was anticipated to be December 2022 at the LEF baseline stage. The conversion of the building at Hawkfield Business Park (TBY2) was started in December 2021 and was operational by October 2022. At the time of the **Mid-term Gateway Review**, TBY1 renewal works had been delayed but were expected to be completed by August 2024, however, they were completed in March 2025, a further seven months later than expected at the interim review (reasons for these delays are explored in section 4.3).

Over the course of the intervention there were **seven change requests that were accepted.** The key changes were associated with budget reprofiling that was allowed for under the value of the main contract entered for the works. An increase in MCA funding from the Investment Fund during the intervention was limited to an increase of £25,000 to extend the scope of the evaluation beyond the original monitoring and evaluation plan submitted at FBC stage for the intervention and after the LEF baseline.

BCC amended the match funding to reflect a contribution secured from an insurance claim and change in the match funding strategy for delivery of the planned rooftop solar array (PV array),, with investment and contribution from Bristol Energy Co-op (BEC) replacing funding originally allocated from the BCC's energy investment budget. This amendment to match funding came before the LEF baseline. The additional works from BEC provided alternative unanticipated match funding and resulted in an increase in the energy output from the planned solar array (PV array) such that TBYS becomes a net exporter of renewable energy.

In addition to the construction and renewal works, the FBC for the intervention included a targeted WDP for South Bristol that would support increasing the workforce to meet the additional production activity (and extra jobs) that would result from the expanded TBYS. The FBC articulated the rationale for such an intervention and the challenges that were in place, it even went as far as naming a number of potential partners for the proposed WDP, including University of the West of England (UWE), ScreenSkills, Knowle West Media Centre and City of Bristol College, and highlighting the reasons as to why they might be good partners.

The budget in the FBC indicated that the goal of the WDP was for a consultant to develop a strategy for such a programme and for the appointment of a Coordination and Outreach Officer to deliver the WDP. The FBC suggested the Coordination and Outreach Officer would initially link with existing training providers including Boomsatsuma, UWE, City of Bristol College and Knowle West Media Centre to establish how to coordinate an expansion of work experience and work placements at TBY and the within the screen sector.

At the time of the LEF, these objectives for the development of a workforce and skills strategy and the grant funding secured for the WDP were translated into three outputs:

i. the employment of an Outreach Coordinator,

ii. the provision of creative media trainee placements; and

iii. the development of key partnerships.

In regard to this last output, UWE, ScreenSkills, Knowle West Media Centre and City of Bristol College were again named as examples of potential partners but, at that stage, their inclusion remained speculative, as the Outreach Coordinator had yet-to-be-appointed. Once the appointment had been made, all were approached alongside others to discuss outreach and careers engagement. Ultimately, the key partners selected were Boomsatsuma, which was already an established industry-focused training organisation within the region, and Bristol Works, which already had established outreach into schools within the region.

At the time of the LEF, the funding was confirmed as £11.82 million from the Investment Fund and £1.73 million in match funding from BCC, a slight increase from the c. £1.6 million cited in the FBC. The position as of the April 2023 change request was the position outlined in the LEF. At the time of writing, TBY2 has been open for nearly three years and the TBY1 refurbishments had been fully completed by March 2025.

It should be noted that TBY1 only has tenants present on site; TBY2 was never intended to – and does not – host permanent tenant businesses.

1.4. Evaluation approach

The evaluation approach was intended to satisfy two different but related goals. A narrowly defined Gateway Review with a set of key evaluation questions for both the construction element of the intervention and the initial operational phase following construction. These evaluation questions were set out in the LEF and designed to satisfy the reporting requirements of the West of England Investment Fund. The Gateway Review was then subsumed within a wider evaluation commissioned by BCC of the operation of TBYS and its economic and non-economic impact, which included an evaluation of sustainability, equalities objectives, and an extended workforce development programme.

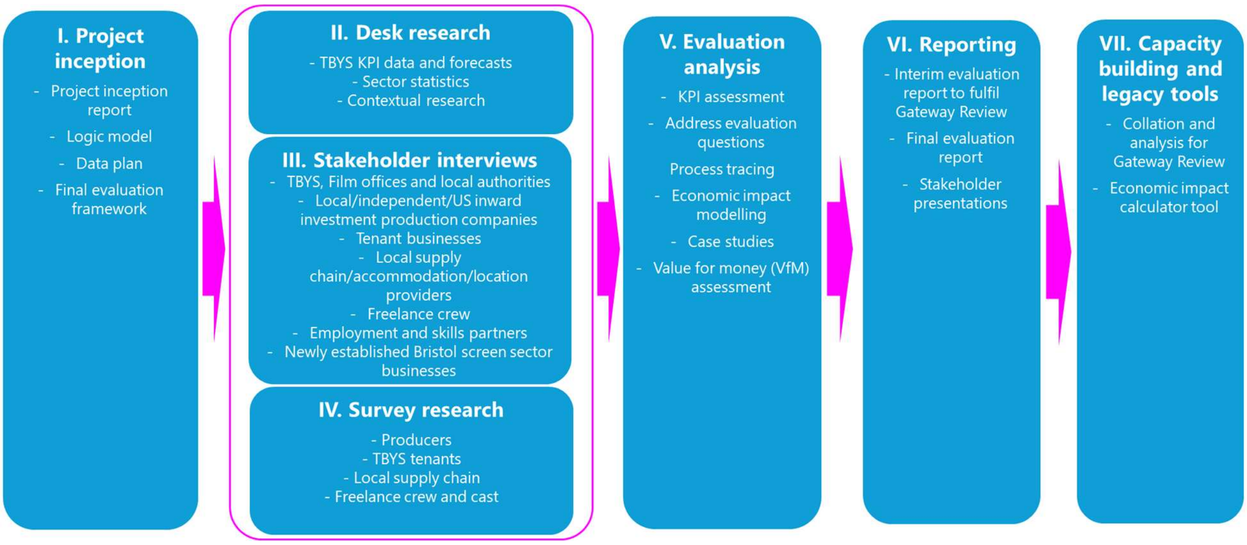
Based on the need for both a Gateway Review and a wider evaluation, the evaluation team developed a single methodology framework. The framework included a review of project monitoring data to address many of the key evaluation questions, alongside surveys of tenant businesses and stakeholders, as well as stakeholder interviews, case studies, and an economic impact assessment that was used to calculate indirect and induced jobs as well as the GVA.

The evaluation team used a combination of:

- Reviews of project monitoring data held by TBYS, BFO, BCC and the MCA. This also included various already-conducted evaluation studies relating to the intervention.
- Interviews across a wide range of stakeholders and interview groups.
- Three separate online surveys of TBYS tenants and suppliers; film and TV producers and production professionals; and crew cast.
- Economic modelling; and
- Case studies.

The interviews were also an opportunity to identify different aspects of TBYS's role in the WoE's screen production ecosystem as potential case studies or 'impact stories'.

Figure 1: TBYS Impact Evaluation Methodology Framework



1.5. Project expenditure

The total planned budget was £13.544 million (£11.817 million Investment Fund and £1.726 million BCC match funding). Actual total project spend was £13.57 million, £0.026 million (0.19%) higher than the planned total project spend. The actual spend included £11.842 million from the MCA Investment Fund (£0.025m or 0.17% higher than planned spend), £1.73 million from BCC (the same as planned spend). The project is due to close once the final evaluation is complete in September 2026..

Table 1: Project expenditure (£m)

Funding source	Planned spend by 31 March 2025*	Actual spend by 31 March 2025	Difference between planned & actual	% difference between planned & actual spend
Devolved funds: MCA Investment Fund	11.817	11.842	+0.025	+0.21%
Public match: BCC Funds	1.726	1.726[8]	0	0%
Total	13.544	13.57	+0.026	+0.19%

Source: Appendix 6 - Bottle Yard LEF 20-07-23 (003)
* Data at the time of the Mid-term Gateway Review.
Totals may not sum exactly due to rounding.
F CG Bottle Yard Studios – Hawkfield Business Park Highlight Report – March 2025

[8] Comprising BCC Capital, BCC Insurance Funds and additional funding from BEC as described in Table 1-2.

2. Methodology

2.1. Desk research

Regular monitoring of relevant metrics has taken place throughout the project by the evaluation team, including data on usage of the floor space, production activity, job creation, recruitment and more. As the site is council-owned (and the project is delivered by the same council, BCC), financial records, records of job creation and production activity, etc, were held as part of the project delivery and retained throughout the impact period.

A body of relevant literature was provided as appendices to the Invitation to Tender (ITT) for the evaluation, which were substantially augmented by additional project reporting documents during the inception phase of the evaluation, to which further documents were provided over the course of the evaluation and the evaluation write-up period. These were reviewed and where relevant were used to either contextualise this evaluation or as sources of evidence.

Nordicity's ongoing consulting work within the film and TV production sector in the WoE region and across the wider UK meant that the evaluation team was already well-sighted on major UK public reports pertaining to market trends and policy development in the film and TV production sector.

2.2. Stakeholder interviews

Up to 48 interviews were planned using a selection framework that had been developed covering 12 different groupings of internal stakeholders (at BCC and the MCA), TBYS clients (or potential clients) and local and national film and TV production industry stakeholders.

These interviews were designed to assess the impact of the new studio space (i.e. TBY2) and any improvement in the renewed older site (i.e. TBY1), as well as issues that were beyond the scope of the Gateway Review but within the scope of the wider evaluation.

The stakeholder interviews went beyond film and TV production companies that had used TBY2 and TBY1. The evaluation team also leveraged Saffery LLP's client network and interviewed UK and US production companies that have not previously used TBYS to understand their perceptions of its offer and changing competitiveness.

In alignment with the LEF, before coming to a decision about selection, the evaluation team spoke with the BFO to get their insight into the local potential consultees. The MCA and TBYS were also consulted to obtain their input before the evaluation team produced a typology (see Table 2) based upon their original proposal for the evaluation, the input from these parties and taking account of the film and TV industry in the WoE at the time of selection. The inclusion of TBYS and the MCA in the selection process was done to provide the best insight into the potential consultees before their selection.

The stakeholder interviews were a vital source of information for the qualitative aspects of the evaluation. The evaluation team were able to secure a total of 37 interviews. A further two consultees did not feel there was a need to conduct an interview but instead provided an email response. **In total there were 39 stakeholder 'engagements'** (see Appendix A: List of stakeholder consultees, for a full list). This provided a wide range of perspectives. The only category of stakeholder where there was minimal coverage were local supply chain companies – only one company was interviewed instead of the planned four.

Interviews were conducted online via Teams/Zoom or in-person, each lasting approximately 30-45 minutes. The evaluation team ensured a consistent approach to interviewing across different participants to maintain information quality. The interviews followed a common semi-structured interview guide with general questions for all groups and specific questions tailored to each interview group in order to ensure a consistent approach. Automated transcriptions and/or manual notes were taken with participants' consent, for detailed later analysis.

The evaluation team used thematic analysis to identify common themes and insights across all interviews, comparing experiences and perceptions among the different stakeholder groups to understand diverse perspectives. This enabled the evaluation team to identify key barriers and challenges for TBY2 and TBY1.

Table 2: Typology for the different interview groups

Interview group	Potential consultees/rationale	Target	Achieved
Film offices and local authorities	TBYS management Bristol Film Office (BFO) and Bath Film Office Bristol City Council (BCC) and West of England Mayoral Combined Authority (MCA)	6	7
Local production companies	Breadth of content producers e.g. drama, animation, natural history, feature film, factual, branded content	2-4	3
UK independent production companies	UK producers of tentpole streamer series plus other drama producers	4-6	5
US inward investment production companies	A mix: established users of TBYS, new user of TBYS, at least 2 non-users of TBYS	4-6	5
Tenant businesses	A mixture of different types of business: supplies, craft/technical, producer/digital content	1-2	2
Local supply chain companies	Services and supplies: equipment hire, office supplies, craft supplies, catering, post-production and VFX	4	1
Local accommodation provider	Harbour Hotel – a central city hotel with capacity to host production office space	1	1
Built location	Clifton College – a working school that has embraced out of term filming	1	1

Interview group	Potential consultees/rationale	Target	Achieved
Freelance production crew	A mix of roles: local location manager, prop master, local production manager, gaffer	4	3
Newly established Bristol screen sector businesses	A service company and a production company	2	2
Employment and skills partners	Touchpoints: FE, unemployed, production company with emphasis on trainees, and schools	4	3
Local and national support organisations	Support bodies like Royal Television Society, Invest Bristol & Bath, Production Guild of Great Britain	8	6
Total		41-48	39

2.3. Online surveys

The evaluation team conducted three online surveys:

1. Local crew and cast;
2. TBYS tenants and suppliers; and
3. Producers/production companies.

The surveys were designed to capture a range of data, both quantitative and qualitative. The quantitative questions were aimed at capturing economic data that could be used in the economic impact modelling and to evaluate success against key performance indicators (KPIs). These datapoints would go above and beyond what could reasonably be collected during stakeholder consultation, as well as allowing for a larger range of respondents.

Across all three surveys, respondents were also asked to rate their experience of using both TBY1 and TBY2 through Likert-scale questions across a range of criteria to quantify their qualitative experience.

The surveys also provided respondents with an opportunity to leave longer, written answers providing feedback on their experience of TBY, in order to capture qualitative responses from people and businesses who were not part of the consultation process. The questionnaires for all three surveys can be found in Appendix D: Online survey questionnaires).

The three surveys were designed by Nordicity in collaboration with the MCA, BFO and TBYS staff members. Due to poor response rates, extensions to the deadline were also made in order to keep the surveys in the field for long enough to gather sufficient responses.

Online survey of local crew and cast

TBYS shared the survey on social media platforms from their official accounts and erected posters with QR codes to the survey around the TBYS sites, as well as promoting the survey at TBYS industry events hosted at TBY1. The survey links were also provided to incumbent clients as well as permanent tenants so they could share with their crews.

This distribution approach was subject to fluctuations in the number of productions filming onsite throughout the survey window. The aforementioned delays to the release of the survey meant that production windows in late 2024 were missed, and with that a large onsite presence.

While efforts were made through the use of the TBYS crew database to distribute the survey to those cast and crew no longer regularly onsite, this was undoubtedly a missed opportunity. The survey was released at the start of 2025, to coincide with the reintroduction of filming to TBY1 and TBY2. The survey deadline was extended to attempt to take advantage of this busy filming period, when more crew were onsite and therefore exposed to the QR codes around the site.

During the survey window, there were 7 productions on site at the studios. Based on the distribution methods described, TBYS estimates that the survey could have reached approximately 600-700 crew and cast.

The survey was opened by 187 individuals, of which 65 completed responses and provided data-privacy consent. Based on this, roughly 28% of the 600-700 cast and crew that could have been exposed to the survey during the survey window opened the survey, with roughly 10% providing a full response and data-privacy consent.

The respondents worked across a range of film departments, and with varying levels of industry experience. The vast majority of respondents worked in high-end television (HETV) productions (88%), evenly spread across Budget Bands 1 to 4.

Online survey of tenants and suppliers

This survey was opened by 49 businesses, including tenant businesses (i.e. businesses based at TBY1) and other production services suppliers (based outside of TBY1), with 17 companies ultimately providing completed responses and data-privacy consent.

Six of the respondents were permanent tenants at TBY1, or 35% of the 17 permanent onsite tenants, all of whom had been included in the survey circulation and had been actively asked to participate through email, onsite posters and tenant meetings. This was weaker than expected.

The LEF aimed to secure at least 10-12 tenants in the research. Higher levels of engagement were expected due to the fact these businesses have very close working relationships with TBYS staff and there had been repeated attempts to engage them. The lower than expected response rate was to a small extent mitigated by the fact that an additional three tenants were engaged via the interviews.

The tenants of TBYS are suppliers or services that are all part of the supply chain for film and TV production and there are no two services that are the same. Suppliers vary from set supplies or office supplies to costume makers, to providers of grip equipment. Services vary from security or casting to post-production or special effects, consequently it is not possible to say to what extent the nine tenants that contributed to the survey and interviews were representative of the 17 total tenants.

11 respondents were suppliers, from a list of the 88 local suppliers listed in TBYS's Local Suppliers List of businesses that have provided production services at TBY1 or TBY2. 11 responses represents 12.5% of the total number of businesses contacted. This response rate was also weaker than expected, despite frequent follow ups being made, response rates remained low. As with the tenant survey, engagement was boosted by interviews with one supplier business who did not complete the survey.

The vast majority of respondents were based in either South Bristol or the wider WoE region, offering a variety of production goods and services.

Online survey of production companies

This survey was distributed by TBYS to 21 production companies that have filmed at TBY1 or TBY2. Those production companies that participated in the consultation interviews were also encouraged to participate, in an attempt to capitalise on their existing engagement in the study.

A total of eight UK-based independent production companies responded. Four of these had only filmed at TBY1, two only at TBY2 and two at both TBY1 and TBY2. As of June 2025, a total of 41 production companies had used TBYS since the intervention. Therefore, the survey only captured 20% of the total production companies who have filmed at TBYS since the intervention. This response rate was also weaker than expected even though these businesses also have very close working relationships with TBYS staff. There had been repeated attempts by TBYS staff to engage them, despite this, response rates remained low.

Half of the respondents were based in Bristol and the other half elsewhere in the UK, outside of the wider WoE region. The majority of respondents worked in HETV, but there were also companies that filmed feature films and one that shot commercials at TBYS.

2.4. Review of Bristol Film Office collected data

BFO collects and collates data on filming in Bristol on an ongoing basis. This data was used by the evaluation team to evidence whether key outputs and outcomes were achieved and to profile the nature of the screen content production in Bristol. Critically the filming activity data for location shooting and studio filming was used for the economic modelling.

2.5. Production spending and economic modelling

The estimates of film and TV production spending at TBYS were prepared by the evaluation team based on the filming days data and Filming in England's standard rate card for average daily local spending on film and TV production. This rate card is an industry standard. However, the overall estimate of local film and TV production is a function of the coding of each film and TV project to a type and budget band. The BFO provided this coding.

The modelling of the economic impact of this film and TV production spending was conducted by the evaluation team in accordance with previous research conducted for the British Film Commission (BFC) of the local economic impact of film and TV production in the Bristol cluster (i.e. at TBYS).

An additionality rate of 90% was used to convert estimates of gross GVA and full-time equivalents (FTEs) of employment to net GVA and FTEs. This additionality rate was based on the research conducted by Olsberg-SPI and found in the FBC. Olsberg-SPI concluded that the investment would not be subject to deadweight or displacement. And with respect to leakage, Olsberg-SPI concluded that rates of 20% of Bristol and 10% for the larger economy of the WoE would be commensurate with the findings of its case study research.

Nordicity has reviewed Olsberg-SPI's research in the FBC and finds no reason to vary from its conclusions with the regards to deadweight, displacement and leakage, and thereby, the rate of additionality.

2.6. Economic impact of construction

The modelling of the economic impact of the TBYS construction phase was conducted by an external consultant and incorporated an additionality rate of 60%. On a per 10,000 square foot basis, the evaluation team found that the rate of net job creation (25.5 FTEs) was approximately half that observed by the evaluation team in its own modelling of the construction impact at other larger studios (59.3 FTEs). However, the evaluation team considers these two analyses consistent, given that the latter was for new build construction, whereas the former was for the refurbishment of an existing building. Therefore, the evaluation team's own analyses validate the external consultants' analysis of the economic impact of TBYS construction.

3. Construction outputs and benefits

During the course of the project, BCC amended the match funding to reflect a contribution secured from an insurance claim and a change in the match funding strategy for delivery of the PV solar array, with investment from BEC replacing funding originally allocated from the BCC's energy investment budget. This provided additional and unanticipated match funding by BEC with a new specification of works that increased the energy output from the planned solar array (PV array) to the extent that TBYS became a net exporter of energy.

3.1. Construction of TBY2 (including social value)

The construction phase of TBY2 was completed on time and on budget. TBY2 was handed over to the TBYS Management Team in October 2022 and all operational resourcing and management arrangements were in place by the opening in November 2022. A total of 8,477 m^2 of B1 workspace was converted into a film and TV studio space.

The original FBC forecast that the construction phase of the investment would generate 108 net jobs at TBY2.

The BCC Economic Development Team provided an assessment of the economic impact of the construction phase (see Appendix B: Construction Phase economic impact assessment calculations). According to that assessment, the construction phase generated 130 net jobs.

- Direct construction jobs were calculated, which the Economic Development Team based on the 'Homes and Communities Agency Best Practice Note on Calculating Cost Per Job'.
- Total jobs (including indirect and induced jobs) were calculated using a multiplier of 1.97, which was sourced from the Type 1 UK Employment Multipliers and Effects (ONS, 2015).
- The additionality rate of 90% was drawn from the additionality analysis conducted by Olsberg-SPI for film and TV production for the FBC.

Under this approach, the construction of TBY2 is estimated to have generated 111.08 net jobs – just exceeding the outcome target of 108 net jobs (Table 3).

Table 3: Construction phase net jobs impact at TBY2, assessment by BCC Economic Development Team

Site	Expenditure	Jobs calculations
Hawkfield (TBY2)	Main contract: £5,602,014 Fit-out works: £254,398 Fees: £408,751 Total: £6,265,163	Direct jobs: £6.265m x 10 jobs = 62.65 direct jobs Add indirect/induced jobs: 62.65 jobs x 1.97 = 123.42 total gross jobs Calculate net jobs (deduct deadweight, displacement and leakage (DDispL)): 123.42 x 90% = 111.08 net jobs

Source: BCC and FBC

The evaluation team notes that the estimates of the net jobs impact linked to the construction phase expenditures is aligned with the HCA guidance; however, in three respects the methodology may not provide a representative portrayal of the net economic impact.

i. Use of ONS Type 1 multiplier

The ONS Type 1 multiplier of 1.97 only captures indirect job creation and not induced impact job creation. This could only be estimated using a Type 2 multiplier. For that reason, the total jobs impact may be 15% to 20% understated. Given the small geographic jurisdiction under analysis, a 10% uplift for the Type 2 ratio would be reasonable.

ii. Use of film and TV industry research

The BCC Economic Development team has elected to apply the additionality rate derived by Olsberg-SPI for film and TV expenditure. However, that research reflected a different market and industry than the WoE's construction sector. Indeed, film and TV production is arguably much more WoE. At a minimum, Nordicity would suggest that a displacement rate of 25% should be added to the leakage rate of 10%. A displacement rate of 25% would reflect a market situation where new construction jobs drew workers from other sectors of the Bristol economy, before then resorting to in-migration of labour to fill construction vacancies.

In Table 4, Nordicity has recast the calculations of the net jobs impact of the construction phase (amendments indicated in **bold**). With these amended economic impact assumptions, the net jobs impact of TBY2's construction phase is 91.64 net jobs – falling short of the target of 108 net jobs.

Table 4: Construction phase net jobs impact at TBY2, revised by Nordicity

Site	Net jobs
Hawkfield (TBY2)	Direct jobs: £6.265m x 10 jobs = 62.65 direct jobs Add indirect/induced jobs: 62.65 jobs x 1.97 x. 1.10 = **135.76** total gross jobs Calculate net jobs (deduct DDispL): 135.76 x (1 -25% Disp.) x (1 - 10% L) = 91.64 net jobs

Source: Nordicity calculations based on data from BCC, FBC and ONS

iii. Calculation of net GVA

The original FBC projected a net GVA impact of just under £6 million for TBY2 construction phase (Table 5). The updated assessment by the BCC Economic Development Team (see Appendix B: Construction Phase economic impact assessment calculations) placed this net GVA impact at £7.1 million for TBY2 (Table 6). In both cases, the net GVA was estimated by multiplying the net jobs impact by the average GVA per filled job in the UK construction sector of £63,885, for 2022, which was sourced from ONS Labour Productivity Tables.

Table 5: Construction phase projected net GVA at TBY2, original FBC

Site	Net GVA
Hawkfield (TBY2)	£5,996,160

Source: BCC

Table 6: Construction phase net GVA impact at TBY2, assessment by BCC Economic Development Team

Site	Expenditure	GVA calculations
Hawkfield (TBY2)	Main contract: £5,602,014 Fit-out works: £254,398 Fees: £408,751 Total: £6,265,163	Total GVA (12 months works) 111.08 x £63,885 = £7,096,346

Source: BCC and FBC

Nordicity's own review of the ONS Labour Productivity Tables points to a rate of £65,135 GVA per job for 2022. Under this approach, a more accurate estimate of the net GVA impact could be arrived at by multiplying indirect and induced impact jobs by the whole economy rate of labour productivity of £60,124 in 2022. When these productivity rates are combined with the amended estimate of the net jobs impact of the TBY2 construction phase, the resulting net GVA impact is £5.7 million for TBY2, or 95% of the £6 million target (Table 7).

Table 7: Construction phase net GVA impact at TBY2, revised by Nordicity

Site	GVA calculations
Hawkfield (TBY2)	Total GVA (12 months works) 42.29 x £65,135 = £2,754,559 49.35 x £60,124 = £2,967,119 **91.64 → £5,721,678**

Source: Nordicity calculations based on data from BCC, FBC and ONS

BCC procured ISG (the Contractor) using a two-stage design and build tender process requiring social value targets to be included within stage one bids though no such targets were set in the FBC. This meant that prior to completing the design and appointing the supply chain that would support social value delivery through their sub-contracts, targets were put forward as estimates of what might be delivered.

During delivery, the challenges associated with some targets meant that they were not delivered in full. This included targets around employing long term unemployed people and providing work experience, which could not be realised in full despite significant engagement with the Department for Work and Pensions.

Key challenges were that many candidates did not hold the basic CSCS (Construction Skills Certification Scheme) Cards required for health and safety purposes to work on site. Some of the selected candidates did not turn up to work, or dropped out quickly. That being said, there were three supporting case studies of those who were engaged and retained that identify successes in developing new skills and greater confidence as a pathway to further work opportunities and career progression after the completion of the project. Where targets were not fully met, alternative measures were delivered, including additional apprenticeship hours and additional hours of career support (see Table 8).

Table 8: Additional social value output targets added after start of project (to Quarter 4, 2024-25)

	Additional output targets by end of project	Actual outputs by March 25	Percentage change
Apprenticeships	42 weeks	72 weeks (29/07/21 to 21/11/22)	171%
Number of trainees, college and university students, and school pupils taking part in careers talks, tours and work experience activities led by TBYS.	392	392	100%

Source: Social Value Report by ISG

A key area of additionality was the £3,060,172 spent through contracts with local *micro, small and medium enterprises* (MSMEs) from BS1-BS16 postcodes, achieved through prioritising the local supply chain in sub-contractor tendering, which had a quantified social value of £2,699,071. The social value outcomes were independently verified by the Social Value Portal Ltd on behalf of BCC. It should be noted that no specific targets were set in the Monitoring and Evaluation Plan as a baseline for this outcome to be measured against. The baseline therefore was the tender offer from the contractor. Where tendered social value targets were not achievable due to challenges faced, alternative measures were agreed with the contractor and as identified the quantitative social value offer significantly exceeded that originally tendered.

The Hawkfield Studios Social Value Report prepared by ISG for BCC in November 2022 provides a comprehensive documentation and quantification of the social value generated by the project during the construction phase. ISG demonstrated the project's social value through several case studies of how the project engaged with the local community and education and training sector during the construction phase. It also highlighted how the project had a positive impact on three local residents looking for work and career opportunities who gained valuable experience through the project.

The ISG report also assessed the project's social value by tracking its performance against several social KPIs using the Social Value Portal, including:

- No. of apprenticeships (72 weeks)
- Community support (e.g. investing in local projects)
- Delivery of educational (11 hours) and career support sessions (171 hours)
- Local employment and local spend
- Staff support (136 hours)
- Training opportunities (24 weeks)

The overall monetary value of the project's social impact initiatives is summarised in Table 9. It shows that the project exceeded its original social value and local economic value (LEV) targets by November 2022.

ISG's development and use of social KPIs as well as its estimation of the monetary value of its social value and LEV adheres to well-established approach in economic analysis and evaluation and provides a very effective framework for assessing initiatives such as the TBYS investment, particularly on an ongoing or replicable basis.

Table 9: Summary of social value outputs for TBY2

	Planned outcomes by March 2023	Actual outcomes 29/07/21 to 21/11/22
Construction phase social value outcomes (Social Value (SV) and Local Economic Value (LEV))	Total Value (SLEV) = £230,589 SV = £142,389 LEV = £88,200	Total Value (SLEV) = £3,153,615 SV = £2,780,674 LEV = £372,941.34

Source: Social Value Report by ISG

3.2. Renewal and repair of TBY1

Renewal and repair works at TBY1 were conducted over the period 2021 to 2025. The commencement date was as per milestone but the delivery timeline was extended when the cost of the original procurement of roof works was found to be unaffordable, and so a scaled-back version of works had to be reprocured. The remaining budget was delivered over an extended period to reflect team delivery resource and to best target renewal and repair investment to support activities and opportunities at TBY1, taking works up to March 2025. The TBYS project team reported that the deferment of the residual renewal and repair works had not created any impact to the ongoing use of the TBY1 site and infrastructure.

Part of the rationale for this intervention was the anticipated closure of parts of TBY1 as a result of the Hengrove Park housing development. However, the housing development was delayed and the renewal works at TBY1 were completed.

When the housing development does come to start it is likely that the impact on TBY1 will be less than prior to this intervention, as the works are not anticipated to be as noisy or disruptive as previously assumed. However, the precise impact will not be known until the work starts but given that the development is Council-led and there is now experience from other recent developments nearby of how to mitigate vibration, it is hoped that accommodations can be found that will ameliorate any noise or vibration impacts from the Hengrove Park development.

The original FBC forecasted that the construction phase of the investment would generate 27 net jobs at TBY1.

The BCC Economic Development Team provided an assessment of the economic impact of the construction phase (see Appendix B: Construction Phase economic impact assessment calculations). According to that assessment, the construction phase of TBY1 generated 18.95 net jobs.

- Direct construction jobs were calculated, which the BCC Economic Development Team based on the HCA Best Practice Note on Calculating Cost Per Job.
- Total jobs (including indirect and induced jobs) were calculated using a multiplier of 1.97, which was sourced from the Type 1 UK Employment Multipliers and Effects (ONS, 2015).
- The additionality rate of 90% was drawn from the additionality analysis conducted by Olsberg-SPI for film and TV production for the FBC.

Under this approach, the construction work at TBY1 is estimated to have generated 18.95 net jobs – below the outcome target of 27 net jobs (Table 10).

Table 10: Construction phase net jobs impact at TBY1, assessment by BCC Economic Development Team

Site	Expenditure	Jobs calculations
Bottle Yard Studios (TBY1)	£1,069,290	Direct jobs: £1.069m x 10 jobs = 10.69 direct jobs Add indirect/induced jobs: 10.69 jobs x 1.97 = 21.06 total gross jobs Calculate net jobs (deduct DDispL): 21.06 x 90% = 18.95 net jobs

Source: BCC and FBC

It should be noted that the estimates of the net jobs impact linked to the construction phase expenditures is aligned with the HCA guidance. However – as with the estimation of the economic impacts of the TBY2 construction phase – the methodology used by the BCC Economic Development Team to estimate the net economic impact of the TBY1 construction phase may not provide a representative portrayal in three respects.

i. Use of ONS Type 1 multiplier

The ONS Type 1 multiplier of 1.97 only captures indirect job creation and not induced impact job creation. This could only be estimated using a Type 2 multiplier. For that reason, the total jobs impact may be 15% to 20% understated. Given the small geographic jurisdiction under analysis, a 10% uplift for the Type 2 ratio would be reasonable.

ii. Use of film and TV industry research

The BCC Economic Development has elected to apply the additionality rate derived by Olsberg-SPI for film and TV expenditure. However, that research reflected a different market and industry than the WoE's construction sector. Indeed, film and TV production is arguably much more 'additional' and less prone to deadweight and displacement than construction in the WoE. At a minimum, Nordicity would suggest that a displacement rate of 25% should be added to the leakage rate of 10%. A displacement rate of 25% would reflect a market situation where new construction jobs drew workers from other sectors of the Bristol economy, before then resorting to in-migration of labour to fill construction vacancies.

In Table 11, Nordicity has recast the calculations of the net jobs impact of the construction phase (amendments indicated in bold). With these amended economic impact assumptions, the net jobs impact of TBY1's construction phase is 15.64 net jobs – falling short of the target of 27 net jobs.

Table 11: Construction phase net jobs impact at TBY1, revised by Nordicity

Site	Calculations
Bottle Yard Studios (TBY1)	Direct jobs: £1.069m x 10 jobs = 10.69 direct jobs Add indirect/induced jobs: 10.69 jobs x 1.97 x 1.10 = 23.17 total gross jobs Calculate net jobs (deduct DDispL): 23.17 x (1 -25% Disp.) x (1 - 10% L) = 15.64 net jobs

Source: Nordicity calculations based on data from BCC, FBC and ONS

iii. Calculation of net GVA

The original FBC projected a net GVA impact of just under £1.5 million for TBY1 construction phase (Table 12). The updated assessment by the BCC Economic Development Team (see Appendix B: Construction Phase economic impact assessment calculations) placed this net GVA impact at £1.2 million for TBY2 (Table 13). In both cases, the net GVA was estimated by multiplying the net jobs impact by the average GVA per filled job in the UK construction sector of £63,885, for 2022, which was sourced from ONS Labour Productivity Tables.

Table 12: Construction phase projected net GVA at TBY1, original FBC

Site	Net GVA
Bottle Yard Studios (TBY1)	£1,499,040

Source: BCC

Table 13: Construction phase net GVA at TBY1, assessment by BCC Economic Development Team

Site	Expenditure	GVA calculations
Bottle Yard Studios (TBY1)	£1,069,290	Total GVA (12 months works) 18.95 x £63,885 = £1,210,621

Source: BCC and FBC

Nordicity's own review of the ONS Labour Productivity Tables points to a rate of £65,135 GVA per job for 2022. Under this approach, a more accurate estimate of the net GVA impact could be arrived at by multiplying indirect and induced impact jobs by the whole economy rate of labour productivity of £60,124 in 2022. When these productivity rates are combined with the amended estimate of the net jobs impact of the TBY1 construction phase, the resulting net GVA impact is £977,000 for TBY1, or one-third below the target of £1,499,040 (Table 14).

Table 14: Construction phase net GVA at TBY1, revised by Nordicity

Site	GVA calculations
Bottle Yard Studios (TBY1)	Total GVA (12 months works) 7.22 x £65,135 = £470,274 8.42 x £60,124 = £506,244 **15.64 → £976,518**

Source: Nordicity calculations based on data from BCC, FBC and ONS

3.3. Environmental sustainability

As part of the £13.5m investment in TBYS, environmental sustainability was an important additional dimension to the intervention and was built into the project from the outset. This dimension aligned with the Clean Growth theme from the WoE Local Industrial Strategy by ensuring that investment in this infrastructure reduced energy demand and carbon emissions whilst being resilient to the impacts of climate change. To this end, a number of activities or behaviours were incorporated into the project.

- A Construction Management Plan was developed by the project contractor to identify appropriate environmental management measures to minimise waste and the impacts of construction traffic.
- The project delivery was designed to consider opportunities to reduce embodied carbon in the materials used for construction.
- A Travel Plan was considered to encourage and maximise the use of public transport and active travel for occupiers and visitors.

The project considered opportunities to reduce carbon emissions through measures for the installation of natural ventilation to studios and upgrading of lighting with low energy LED lights and installation of solar panels.

Formally there were two targets related to improving environmental sustainability during the construction phase – both of which were far exceeded (Table 15).

Some additional works were also part of the intervention, such as the solar array (or PV array) that was intended to provide 283 kW of energy. The procurement process secured BEC to build and operate a PV array. They brought additional financing and were able to exceed BCC’s Energy Service’s capital plan by maximising the use of roof space and increasing energy output by 3.5 times that envisaged in the FBC. This resulted in an increase from 283 kW in the FBC to 1,000 kW of renewable energy, making it a net exporter of energy, while also being the largest solar array in Bristol.

Table 15: Non-LEF project outputs to Quarter 4, 2024-25

	Additional output targets by end of project	Actual outputs by March 25	Percentage change
Reduction in carbon emissions[9]	45%	110%	262%
Generation of electricity through solar panels.	285Kw peak	999.6Kw peak	351%

Source: BSH/CEN/Hawkfield Studios, Social Value Report: ISG

Although sustainability outcomes were outside the scope of the LEF, the End of Project Delivery Report does point to many industry awards and accreditations that were secured following the construction of TBY2 (Table 16).

Table 16: Summary of environmental sustainability awards and accreditation for TBYS

Type	Outcome	Name/Description
Awards	Winner	City of Film Award at Screen International’s Global Production Awards 2024 (‘Bristol’ was category winner at these Awards which are focused on sustainable film production. Evidence of TBYS skills programme and TBY2's solar energy project were a major contributor to the win.)
		Sustainable Initiative Award at Screen International’s Global Production Awards 2023 (for TBY2 solar energy project)
		Innovation in low carbon technology award, Future Leap Sustainable Business Awards 2023
		Special Mention at the Constructing Excellence South West Awards 2023
	Finalist	Sustainability Award at The Makers & Shakers Awards 2023
		Project of the Year at the Constructing Excellence South West Awards 2023
Accreditations	Outstanding status	BAFTA albert Studio Sustainability Standard 2025/26 (for TBY2): BAFTA albert, the leading authority on environmental sustainability in the screen industries, TBY2 is officially the highest performing studio of the 2025/26 Studio Sustainability Standard, rated Outstanding with an overall score of 97% – ranking it as the most sustainable film and TV studio across all participating global studios. (TBY1 was also accredited, rated Excellent.)
		BAFTA albert Studio Sustainability Standard 2024 for TBY2. TBY1 was also accredited, rated Very Good.)
	Very good status	BAFTA albert Studio Sustainability Standard 2023 for TBY2.

Source: TBYS and BCC

[9] Appendix 9 - Carbon Emissions Reductions Technical Note of the TBY2 – Post Occupancy Evaluation Report provides an explanation of how the reduction in carbon emissions is calculated.

4. Operational outputs and benefits

4.1. Production activity at TBYS

In the following section, we assess the levels of production activity at TBYS.

Number of projects

Data for the number and type of film and TV projects hosted at TBY1 and TBY2 between 2020-21 and 2024-25 was sourced from TBYS. Projects were coded by TBYS and BFO in accordance with the Filming in England rate card.[10] In total, across the five-year period, 2020-21 to 2024-25, TBYS hosted the production of 115 audiovisual projects (Figure 2). This included:

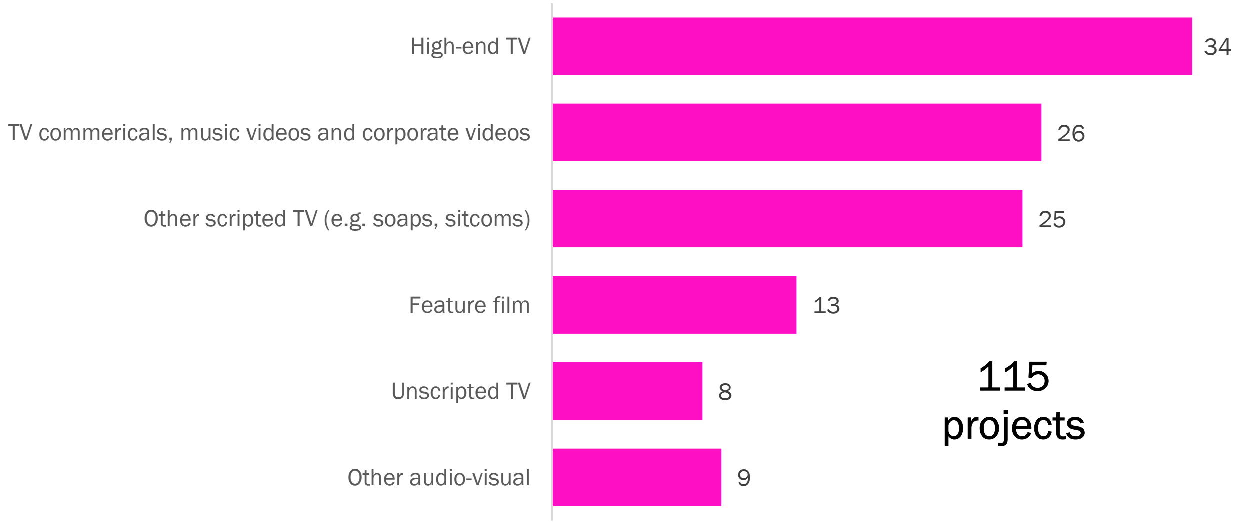
- 34 high-end TV (HETV) projects (with budgets exceeding £1 million per hour)
- 26 TV commercials, music videos and corporate videos
- 25 other scripted TV projects
- 13 feature films (including 8 micro-budget films)
- 8 unscripted TV projects (i.e. light entertainment, reality, TV documentary)
- 9 other audiovisual projects

The annual number of film and TV projects produced at TBY1 and TBY2 tripled from a total of 10 in 2020-21 to a total of 30 in 2023-24 and 2024-25. TBYS experienced year-to-year increases in the number of productions in 2021-22, 2022-23 and 2023-24, before staying at the 30-projects level in 2024-25.

What is notable about the year-to-year trend is the shift from a production slate consisting scripted TV production (under £1 million per hour), TV commercials, music videos and corporate videos to one where the predominant client type was HETV productions (with budgets of £1 million or higher), following the opening of TBY2 in 2022-23. So whilst the annual increase in the number of hosted audio-visual projects rose by only five in 2023-24 – and did not increase at all in 2024-25 – the production spending associated with those 30 projects undoubtedly increased.

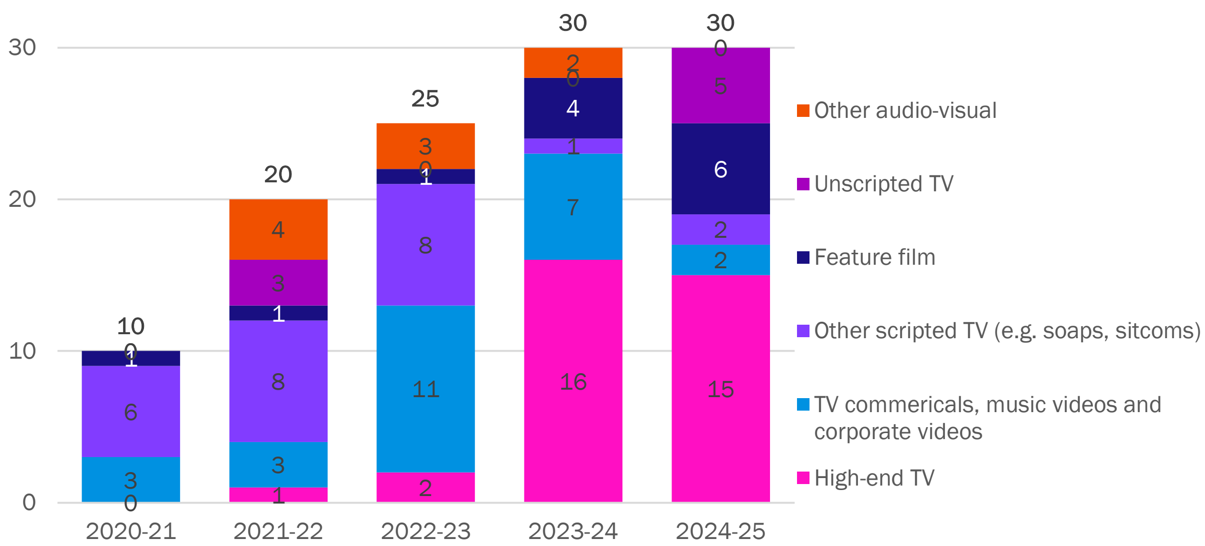
[10] The rate card provides estimates of the average daily local spend for each type of audiovisual production and therefore permitted us to convert the statistics for the number of projects into estimate of local production spending.

Figure 2: Number of projects filmed at TBYS, 2020-21 to 2024-25



Source: Nordicity/Saffery tabulation based on data from TBYS

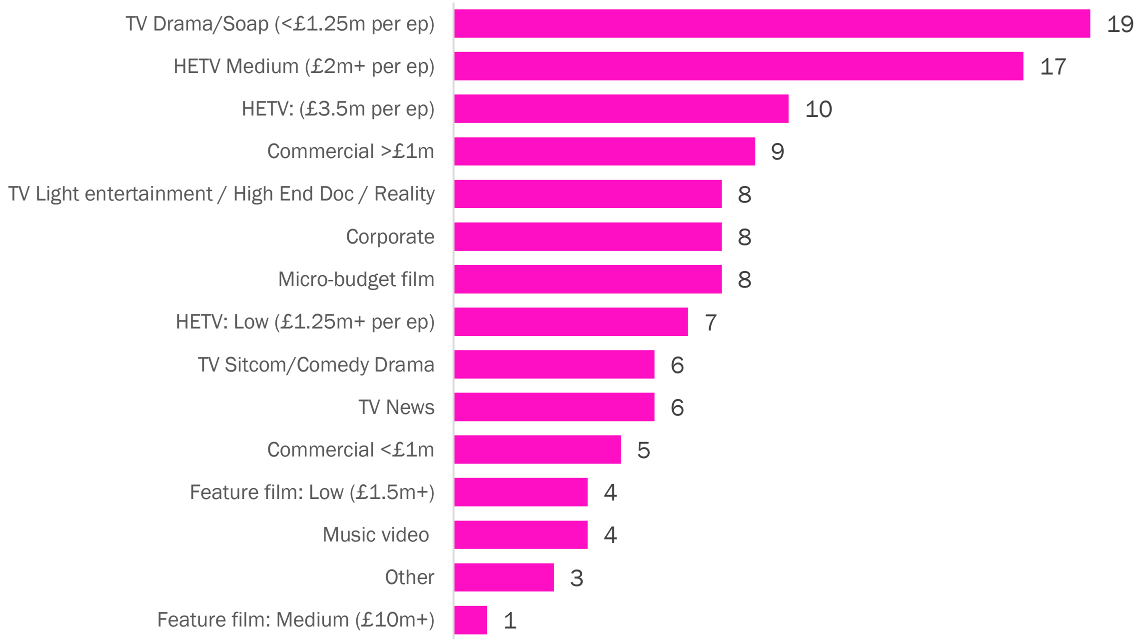
Figure 3: Annual number of audio-visual projects filmed at TBYS, 2020-21 to 2024-25



Source: Nordicity/Saffery tabulation based on data from TBYS

Figure 4 provides a granular summary of the number of projects filmed at TBYS between 2020-21 and 2024-25, in terms of each project's Filming in England rate card category. The results show that scripted TV, and to a lesser extent unscripted TV, were significant components of the TBYS slate. This was in contrast to the production of feature films including micro-budget films. Table 17 provides a year-to-year breakdown of the production slate in terms of the rate card categories.

Figure 4: Total number of Audio-visual projects filmed at TBYS, 2020-21 to 2024-25, all rate card categories



Source: Nordicity/Saffery tabulation based on data from TBYS

Table 17: Number of TBYS projects by type

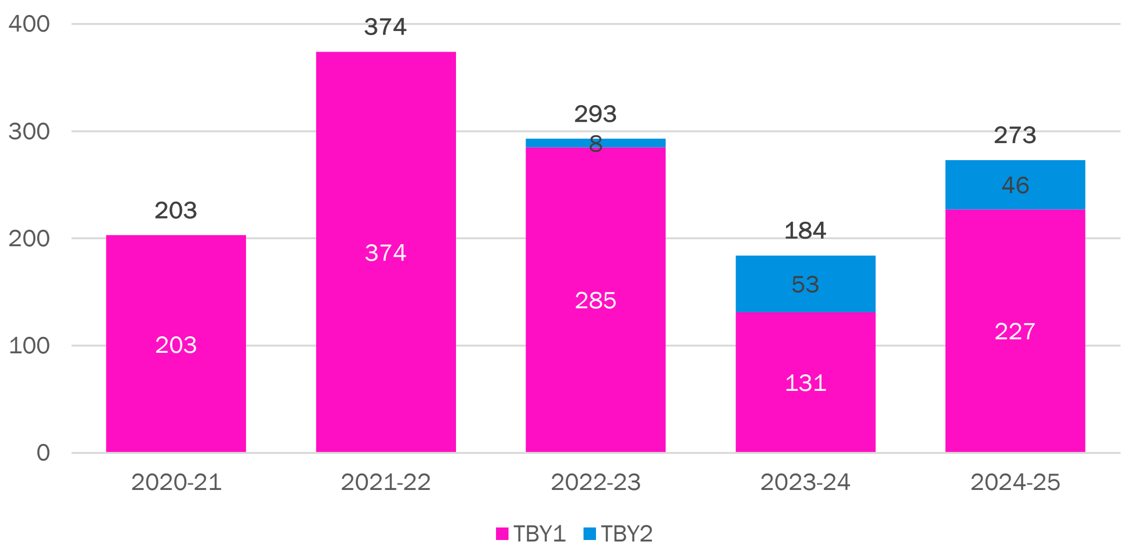
Rate card group	Type	Estimated daily local spend (£)	2020-21	2021-22	2022-23	2023-24	2024-25	5-year total
B	Feature film: Medium (£10m+)	£90,000	0	0	1	0	0	1
C	Feature film: Low (£1.5m+)	£13,000	0	0	0	3	1	4
D	HETV: (3.5m per ep)	£80,000	0	0	0	5	5	10
E	HETV Medium (£2m+ per ep)	£61,000	0	1	2	8	6	17
F	HETV: Low (£1.25m+ per ep)	£46,000	0	0	0	3	4	7
G	TV Drama/Soap (<£1.25m per ep)	£20,000	6	6	6	1	0	19
H	TV Sitcom/Comedy Drama	£12,000	0	2	2	0	2	6
I	TV Light entertainment / High End Doc / Reality	£4,000	0	3	0	0	5	8
J	TV News	£500	0	3	1	2	0	6
K	Commercial >£1m	£25,000	2	1	4	2	0	9
L	Commercial <£1m	£15,000	0	2	1	1	1	5
M	Music video	£2,500	0	0	2	1	1	4
N	Corporate	£1,250	1	0	4	3	0	8
O	Micro-budget film	£1,000	1	1	0	1	5	8
P*	Other	£1,250	0	1	0	0	0	1
T*	Other	£1,250	0	0	2	0	0	2
Total		–	10	20	25	30	30	115

Source: Nordicity/Saffery tabulations based on data from TBYS, BFO and Filming in England
* Type and average daily spend not available from Filming in England rate card, so have been imputed by Nordicity

Filming days

The number of filming days at TBYS actually peaked in 2021-22 at 374 (Figure 5).[11] The number of filming days dropped year-over-year in 2022-23 and 2023-24, before climbing to 273 days in 2024-25. As with the number of projects, the trends for the raw number of filming days across TBY1 and TBY2 do not fully reflect the scope of the production activity and therefore the economic benefits of that production activity. In particular, as noted above, the shift over time in the TBYS slate to HETV production invariably means that a single day of filming will generate higher production spending and economic benefits than most other types of film and TV production.

Figure 5: Number of filming days at TBYS



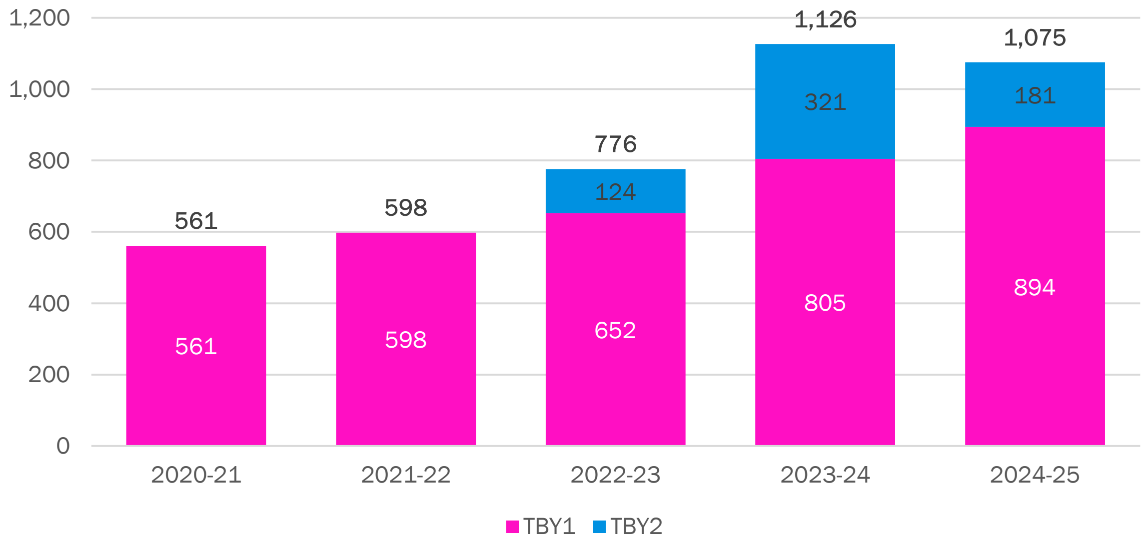
Source: TBYS

Occupancy days provide a wider metric of TBYS's engagement with the film and TV production sector. In contrast to simply 'filming days', occupancy days include the prep and strike days that characterise film and TV production – and arguably would be higher for more complex film and TV projects such as HETV productions. The number of occupancy days at TBYS rose from 561 in 2020-21 to 1,126 in 2023-24. Occupancy days at TBY1 rose from 561 to 850 in 2023-24 (Figure 6). TBY2 added a further 321 occupancy days in 2023-24. There was a slightly dip in occupancy days in 2024-25 (4.5%).

The TBYS occupancy statistics clearly reveal how TBY2 enabled TBYS to increase its capacity by up to 320 days annually. Of note, the occupancy statistics also reveal how the repair improvements at TBY1 in addition to the opening of TBY2 contributed to a steady year-over-year increase in TBY1's occupancy – from 561 in 2021-22 to 894 days in 2024-25.

[11] The annual number of filming days can exceed 365 days, as filming days are counted for each project. So two projects filming on the same day is counted as two filming days.

Figure 6: Number of occupancy days* at TBYS



Source: TBYS
*Includes days of principal photography, prep and strike

Table 18: Filming days at TBY1 and TBY2

	Total filming days (B)	Total prep days (A)	Total strike days (C)	Total occupancy (A + B + C)	Number of productions
TBY1					
2020-21	203	325	33	561	10
2021-22	374	94	130	598	20
2022-23	285	367		652	23
2023-24	131	699	69	899	23
2024-25	227	566	101	894	28
TBY2					
2020-21	n/a	n/a	n/a	n/a	n/a
2021-22	n/a	n/a	n/a	n/a	n/a
2022-23	8	116		124	2
2023-24	53	15	237	305	7
2024-25	46	26	109	181	2
TBY1+TBY2					
2020-21	203	325	33	561	10
2021-22	374	94	130	598	20
2022-23	293	483		776	25
2023-24	184	858	84	1126	30
2024-25	273	675	127	1075	30

Source: TBYS

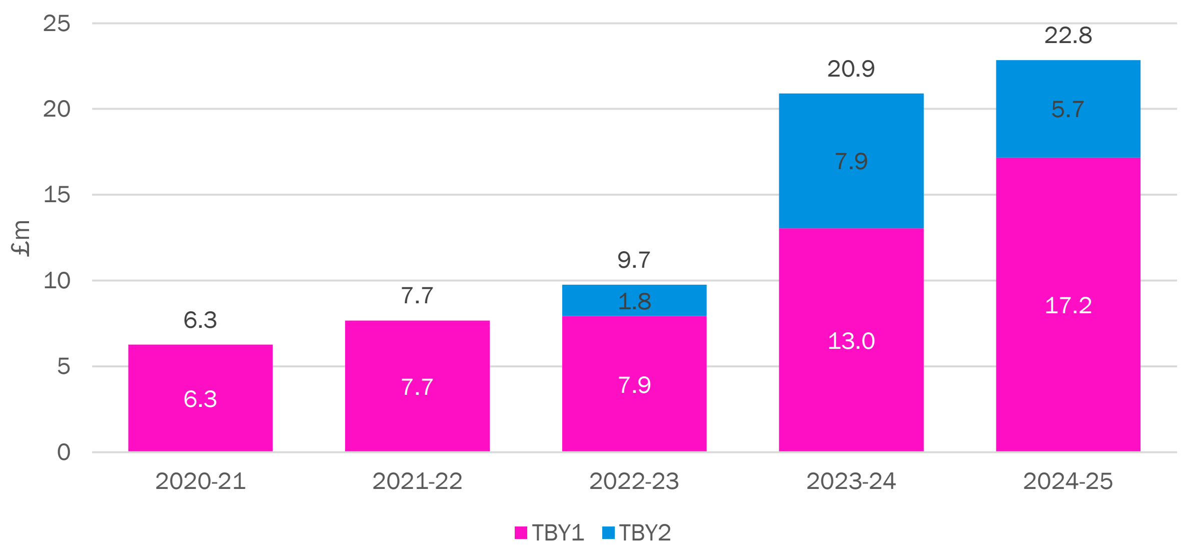
Production expenditures

TBYS and BFO also provided the number of filming days for each project (broken down by prep, principal photography and strike days). In accordance with the Filming in England Rate Card guidance, the daily spend rates for prep and strike days were set at 50% of the standard daily spend rate for principal photography. Filming days were multiplied by the rate card to derive estimates of the annual levels of local production spending at TBY1 and TBY2.

This approach indicates that the value of local film and TV production spending at TBYS more than tripled between 2020-21 and 2024-24 – from £6.3 million to £22.8 million (Figure 7). This trend corroborates the hypothesis mentioned earlier in the section that raw filming days statistics – and even occupancy days – alone do not reflect the economic scope of production activity at TBYS.

The production spending statistics show that TBY2 was additive to TBY1, particularly in 2023-24 and 2024-25, when it accounted for £7.9 million and £5.7 million in production spending, respectively. However, the production spending statistics also reveal how TBY1 has experienced a steady increase in the value of production spending that it hosts. Once again, this is partly due to the repairs and improvements at TBY1, but also due to the positive 'spillover effect' of TBY2.

Figure 7: Film and TV production spending at TBY1 and TBY2



Source: Nordicity estimates based on data from TBYS, BFO and Filming in England

4.2. Production activity across the wider region

In the following section, we assess the levels of production activity across the wider WoE region, on account of the expansion of TBYS, with the opening of TBY2 and renewal and repairs at TBY1 in recent years.

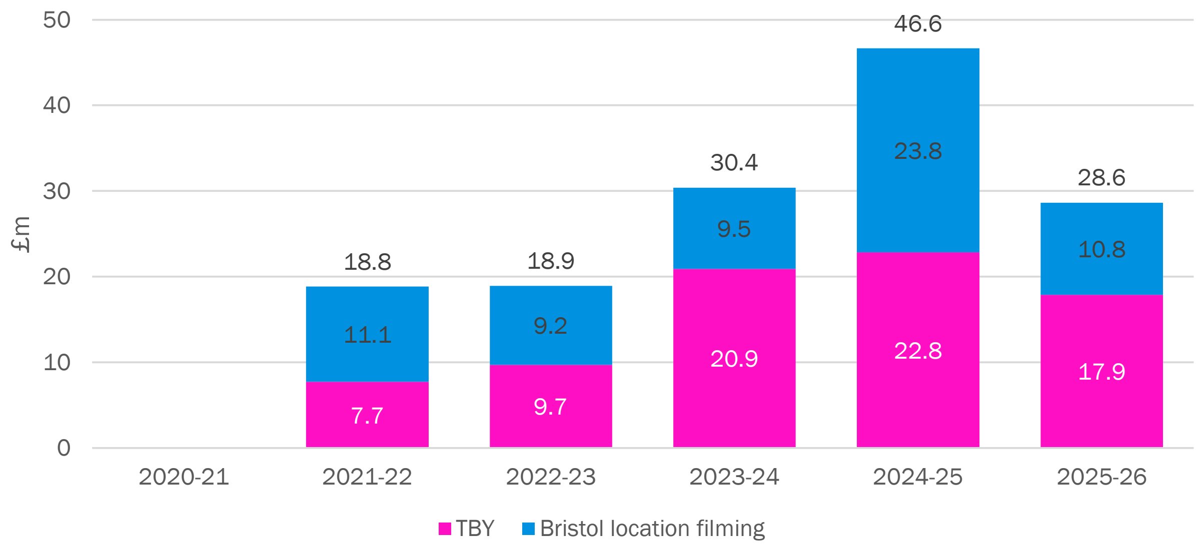
Filming in Bristol

The positive impact that TBYS has had on Bristol's wider film and TV production sector is evident from BFO's economic impact statistics.

Following the opening of TBY2 in 2022-23 and the ongoing renewal of TBY1, not only did local production spending at TBYS increase from £7.7 million to £22.8 million in 2024-25, before dipping in 2025-26, but importantly, location filming in Bristol expanded (Figure 8). In 2024-25, the value of location filming more than doubled to £23.8 million. **TBY2 has enabled the region to attract larger scale HETV productions that not only occupy the studio, but also generating location filming opportunities.**

In total, the value of film and TV production spending in Bristol jumped from £18.8 million in 2022-23 (the year of TBY2's opening) to £30 million in 2023-24, reaching a record £46.6 million in 2024-25. In 2025-26, film and TV production spending in Bristol did drop to £28.6 million; however, this was still well above the annual average of £18.9 million recorded in the years before TBY2 (i.e. 2021-22 and 2022-23).

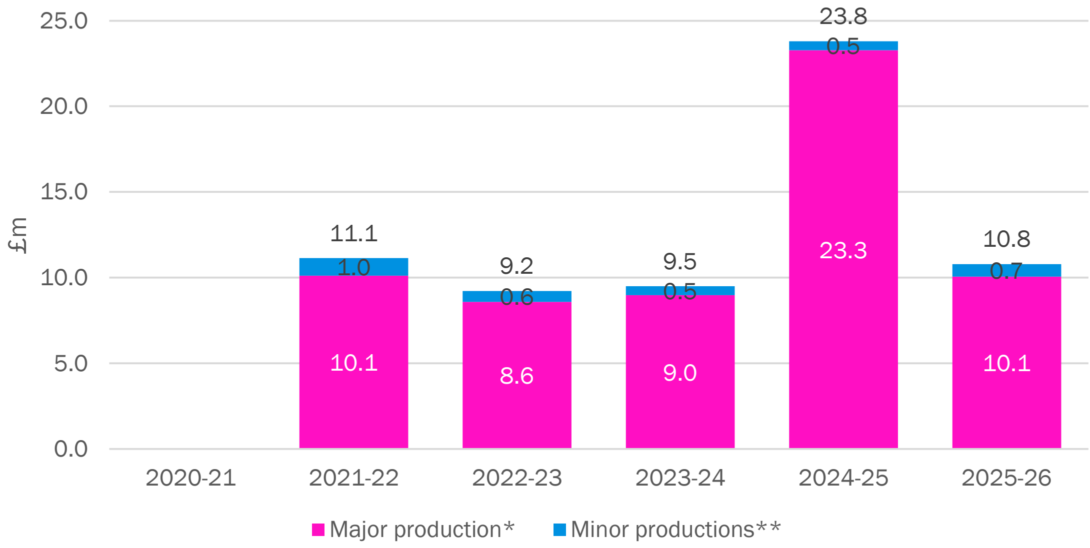
Figure 8: Local film and TV production spending in Bristol



Source: Nordicity estimates based on data from TBYS, BFO and Filming in England

A more detailed breakdown of Bristol's location filming statistics also indicates that the increase in location filming in Bristol in 2024-25 was linked to the types of major HETV titles (namely Disney+'s *Rivals*) and feature films that also film at TBYS or use it as a base for production in the region.

Figure 9: Local production spending generated by location filming in Bristol, by type of production



Source: Nordicity estimates based on data from TBYS, BFO and Filming in England
* Includes HETV or feature films
** Includes lower-budget audiovisual production

Filming in WoE

The wider economic benefits of TBYS do not stop at the boundaries of City of Bristol. The other regions of WoE, including South Gloucestershire, Bath and North East Somerset have also hosted location filming associated with TBYS-based productions.

4.3. Local production cluster benefits

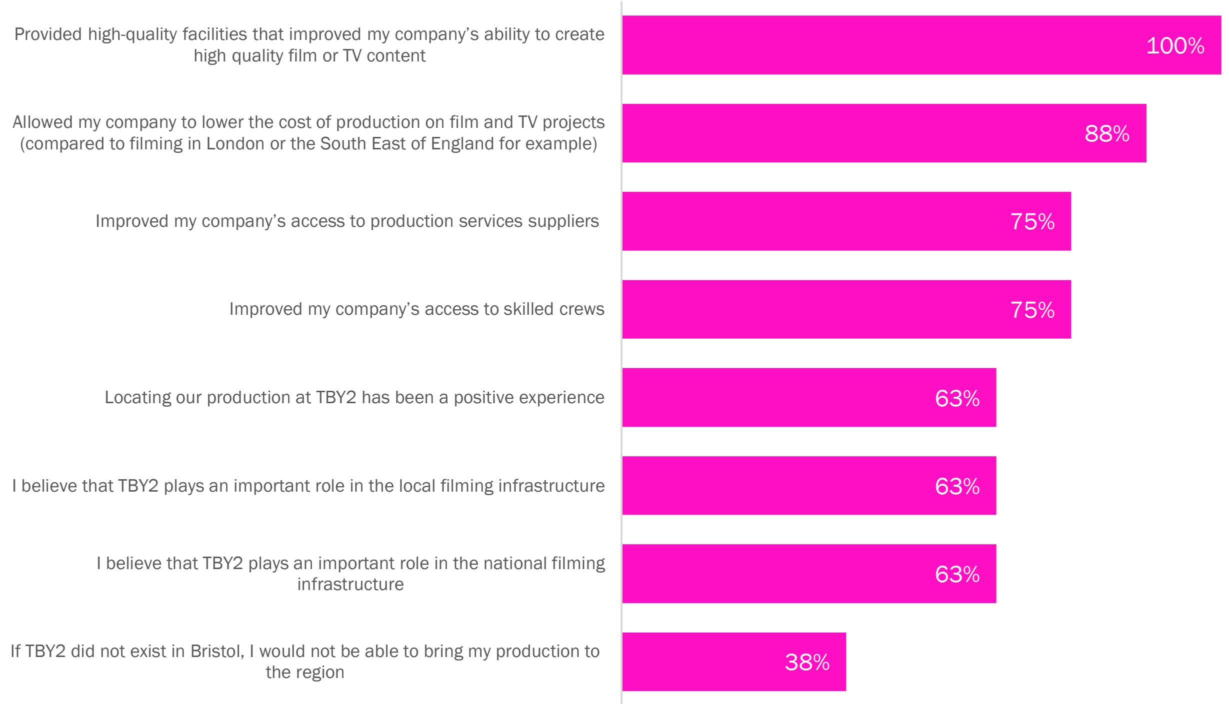
The filming activity and production expenditures statistics presented in sub-section 4.1 and 4.2 demonstrate the economic benefits of TBYS. However, in addition to attracting more and bigger productions to the region, TBYS has been instrumental in promoting the 'development of the local production cluster.

Production ecosystem

Producers and production companies provide a valuable lens through to which assess the WoE's production ecosystem and the role that TBYS has played in contributing to this development.

Figure 10: Production company perceptions of TBYS

Percentage of production company respondents that 'strongly agree' or 'agree' that working on projects at TBYS has...



Source: Nordicity online survey of production companies
Note: Results are taken from a sample of 8 production companies

Local crew benefits (South Bristol and West of England)

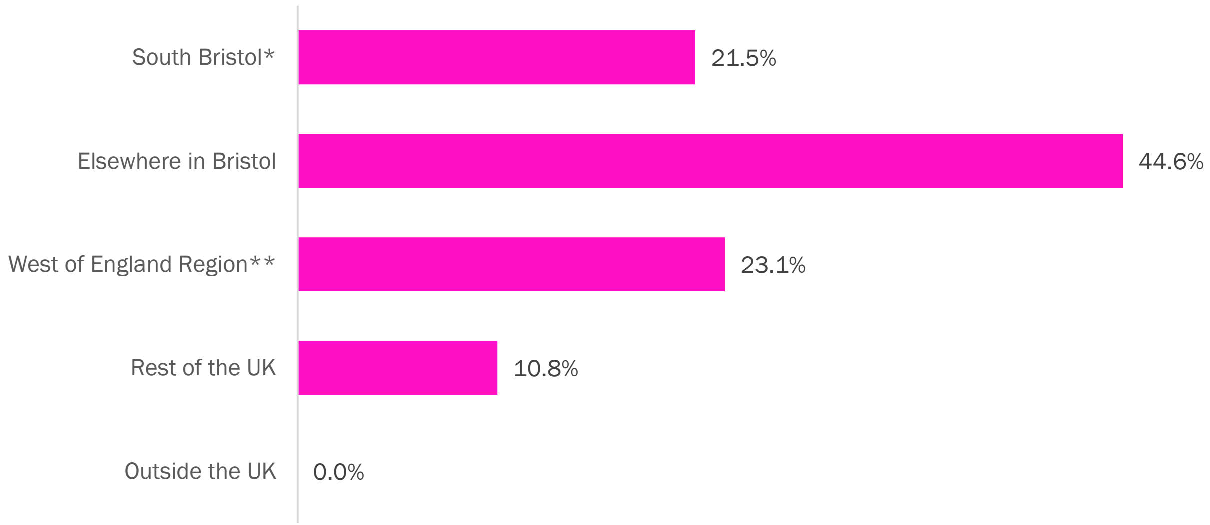
According to the survey of crew and cast working on film and productions at TBYS, 21.5% of crew and cast lived in South Bristol.[12] This broadly matches the proportion of the City of Bristol that lives in the South Bristol Regeneration Area (SBRA), which is 22%. Knowing that i) the creative industries are poorly representative of people from lower socio-economic groups; (ii) that 13 neighbourhoods in South Bristol fall within the most disadvantaged 5% nationally in the Index of Multiple Deprivation 2019; and (iii) that the 10 most deprived neighbourhoods in Bristol are all in South Bristol, it reflects well on the endeavours of the Outreach Coordinator, TBYS and BCC that such parity has been achieved within four years to ensure that the growth from TBYS is inclusive.

This suggests that the skills development programmes at TBYS have been having some success in reaching groups whose presence is typically underrepresented in the film and TV industry. The learnings that the Outreach Coordinator had from the first-year trial of the WDP, the subsequent delivery of the WDP from other sources of funding, and its current iteration as the All Set West initiative means that, in

[12] Bedminster, Southville, Windmill Hill, Knowle, Filwood, Bishopsworth, Hartcliffe & Withywood, Hengrove & Whitchurch Park, Stockwood, and Brislington

due course, it is likely to continue to have a positive impact on South Bristol residents ability to join the film and TV production workforce.

Figure 11: TBYS crew and cast location of residency

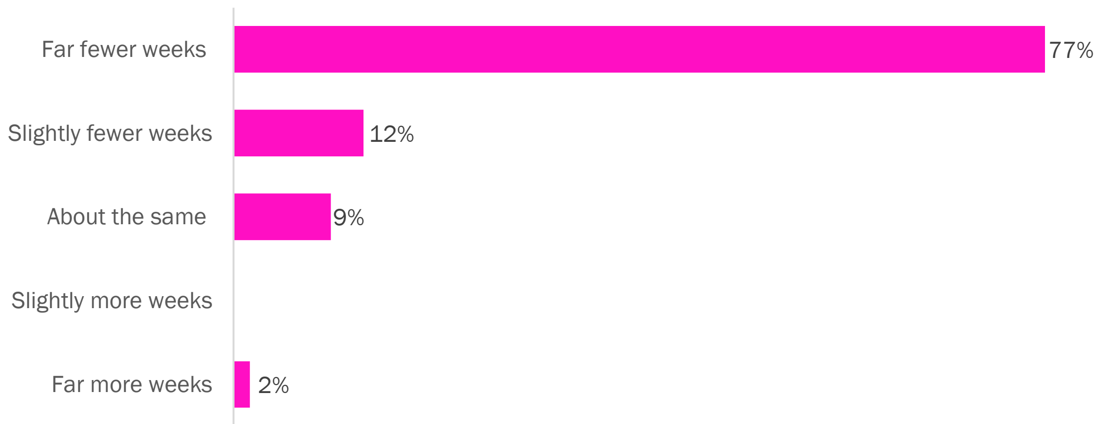


Source: Nordicity online survey of local cast and crew
* Bedminster, Southville, Windmill Hill, Knowle, Filwood, Bishopsworth, Hartcliffe & Withywood, Hengrove & Whitchurch Park, Stockwood, and Brislington

It is clear from the following four exhibits (i.e. Figure 12, Figure 13, Table 19 and Table 20) that (i) TBY1 is critical to cast and crew employment; (ii) TBY2 has, within only a few years, also become an important source of employment, and (iii) together, the expanded TBYS provides more employment and income stability. Employment at TBY2 also connotes a higher level of skills, as the productions at TBY2 require more experienced crew given the higher budgets and technical need.

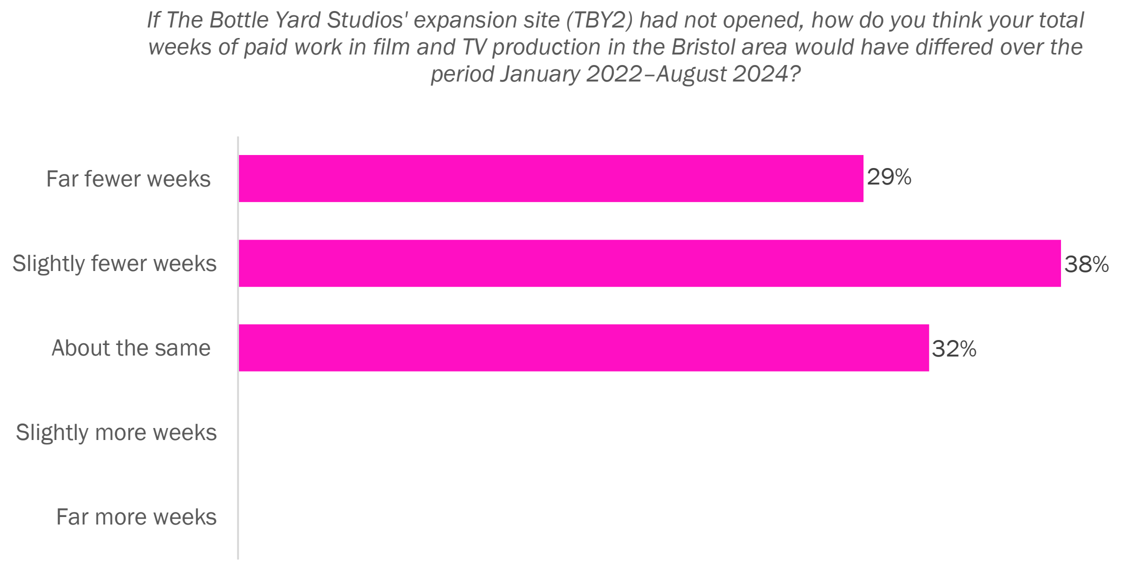
Figure 12: Impact of TBY1 on cast and crew employment in film and TV production

If The Bottle Yard Studios did not exist, how do you think your total weeks of paid work in film and TV production in the Bristol area would have differed over the period January 2022–August 2024?



Source: Nordicity online survey of local cast and crew
Note: Results are taken from a sample of 65 crew

Figure 13: Impact of TBY2 on cast and crew employment in film and TV production



Source: Nordicity online survey of local cast and crew
Note: Results are taken from a sample of 65 crew

Table 19: Crew perception of work stability impact

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know / NA
Working on film or TV productions at The Bottle Yard Studios has...						
Increased the certainty, predictability and stability of my employment and income in film and TV production	38	16	8	1	0	2

Source: Nordicity online survey of local cast and crew
Note: Results are taken from a sample of 65 crew

Table 20: Crew perception of income stability

Which are the most important benefits you've experienced from working at The Bottle Yard Studios? Please rank in order of importance, where 1 = 'most important' and 8 = 'least important'

	1 (most important)	2	3	4	5	6	7	8 (least important)
Job opportunities and improved income stability	30	11	4	3	3	4	5	5

Source: Nordicity online survey of local cast and crew
Note: Results are taken from a sample of 65 crew

Supply chain benefits (South Bristol and West of England)

Using data from the tenant/supplier survey, Filming in England and previous analysis of the economic impact of film and television production in the WoE conducted by Olsberg-SPI, Nordicity estimated the total number of supply chain FTEs (i.e. indirect FTEs) generated between 2021 and 2024 (and attributable to TBYS), and the portion of those FTEs at suppliers based in South Bristol. According to the supplementary survey of tenants/suppliers, the share of FTEs employed at tenants/suppliers and residing in South Bristol increased from 16% in 2021 (i.e. before the opening of TBY2) to 23% in 2024.

Table 21: Estimated share of indirect jobs recruited from South Bristol residents

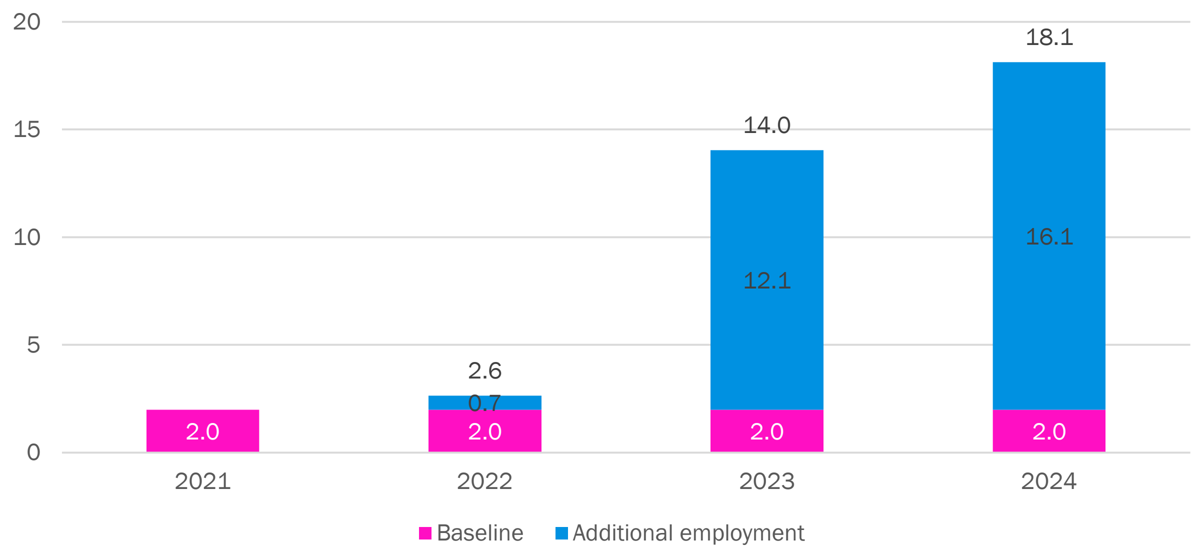
	2021	2022	2023	2024
Share of FTEs from South Bristol	16%	17%	22%	23%

Source: Tenant/supplier supplementary survey

The economic analysis of film and TV production spending, based on the Filming in England rate card and the previous economic modelling conducted by Olsberg-SPI indicates that across TBY1 and TBY2, supply chain employment (i.e. indirect employment) on a gross basis increased from 21 FTEs in 2021 to 63.5 FTEs in 2024. This is the gross employment linked to film and TV production spending at TBYS. After taking into account 75% additionality, net employment increased from 15.8 FTEs in 2021 to 47.6 FTEs in 2024.

According to the survey of suppliers/tenants, employees residing in South Bristol accounted for 2.0 net FTEs in 2021 (i.e. baseline level), increasing to 18.1 net FTEs in 2024 – an increase of 16.1 net FTEs. In other words, across all suppliers and tenants, 16.1 net FTEs were recruited from South Bristol since 2021 (i.e. immediately before the opening of TBY2 in late 2022).

Figure 14: Increased supply chain employment of South Bristol residents

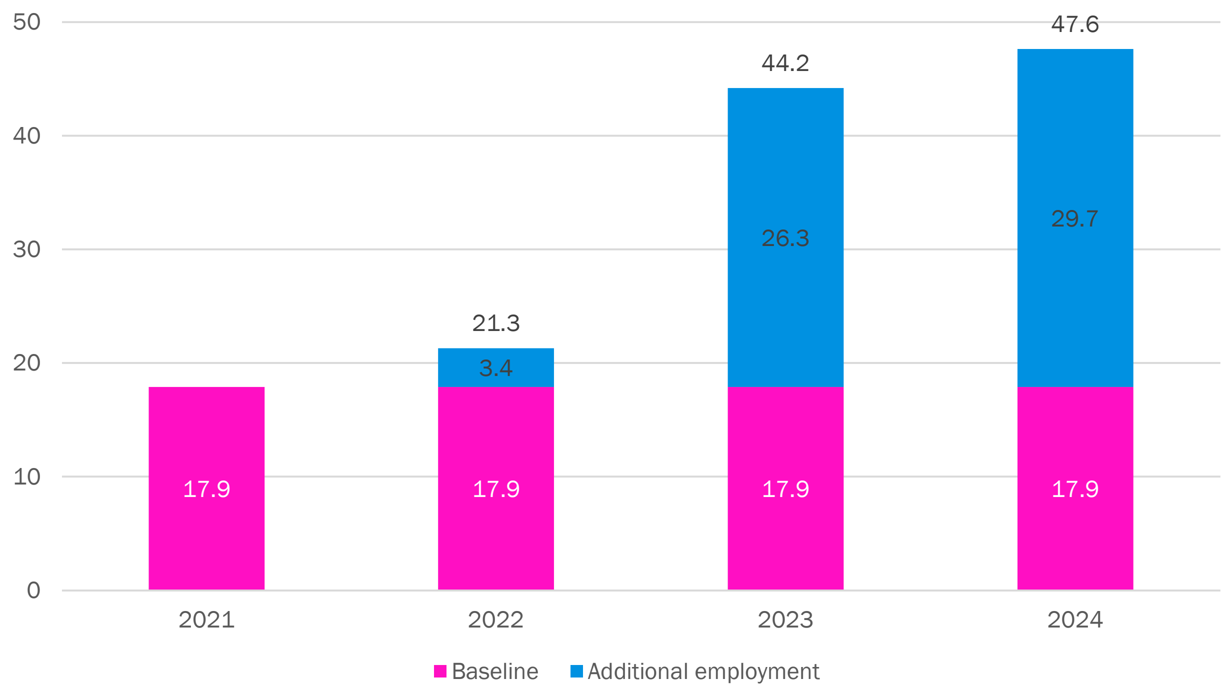


Source: Nordicity estimates based on data from tenant/supplier survey, BFO, TBYS, Filming in England, and Olsberg-SPI

Should the trend in South Bristol residents' increasing share of total supply chain employment continue to 2027, it should rise to 30%.

The tenant/supplier survey data and economic modelling indicate that between 2021 and 2024, 29.7 net FTEs of employment were created in the supply chain on account of work from TBYS productions. – i.e. supply chain employment increased from a baseline of 17.9 net FTEs in 2021 to 47.6 net FTEs.

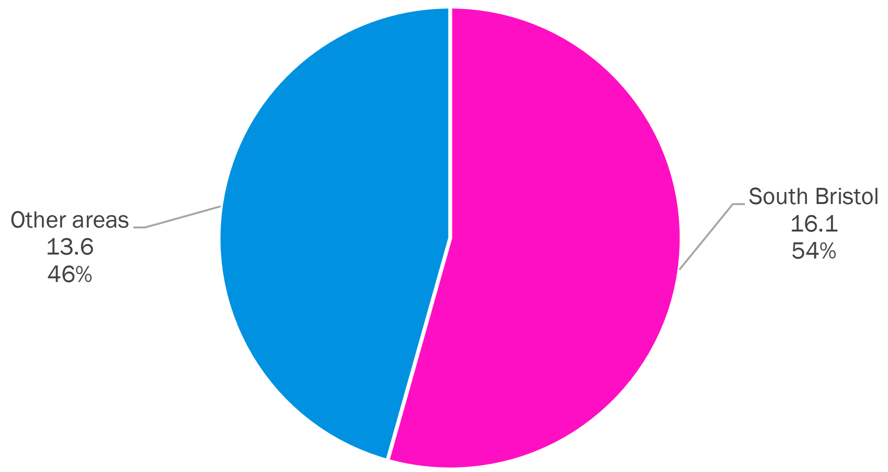
Figure 15: Total supply chain employment attributable to TBYS



Source: Nordicity estimates based on data from tenant/supplier survey, BFO, TBYS, Filming in England, and Olsberg-SPI

As noted above, 16.1 new net FTEs in the supply chain were filled by South Bristol residents. This translates into 54% of the 29.7 net FTEs created in the supply chain between 2021 and 2024 (Figure 16).

Figure 16: Share of supply chain recruitment by suppliers based in South Bristol, 2021-2024

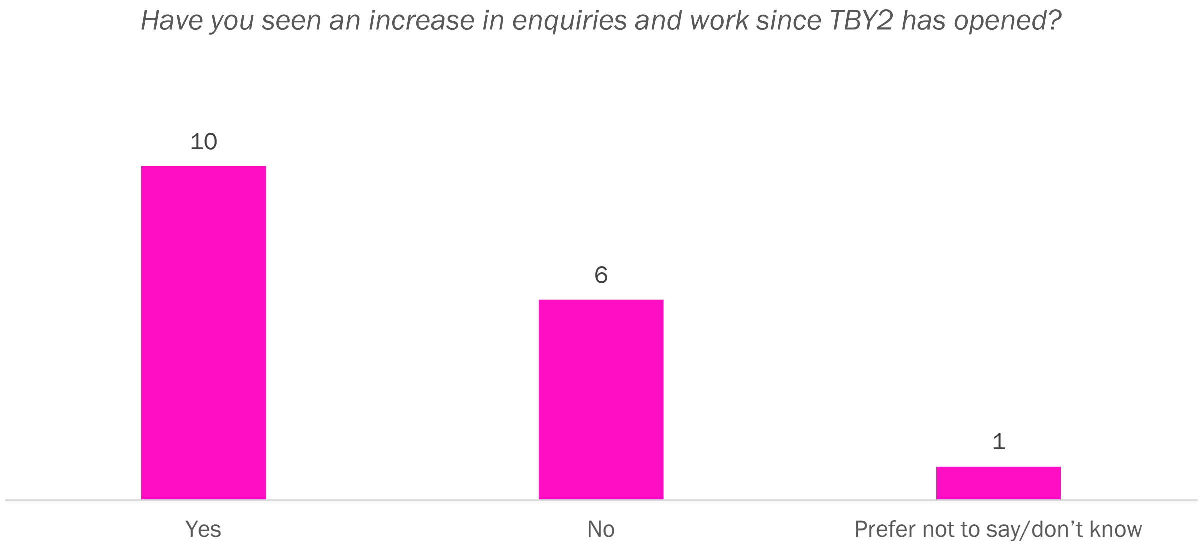


Source: Nordicity estimates based on data from tenant/supplier survey, BFO, TBYS, Filming in England, and Olsberg-SPI

Approximately 59% of production services tenants and suppliers reported that since the opening of TBY2 they had seen an increase in enquiries for their business.

Figure 17: Increase in supplier enquiries

Have you seen an increase in enquiries and work since TBY2 has opened?



Source: Nordicity online survey of tenants and suppliers
Note: Results are taken from a sample of 6 tenants of TBY1 and 11 suppliers

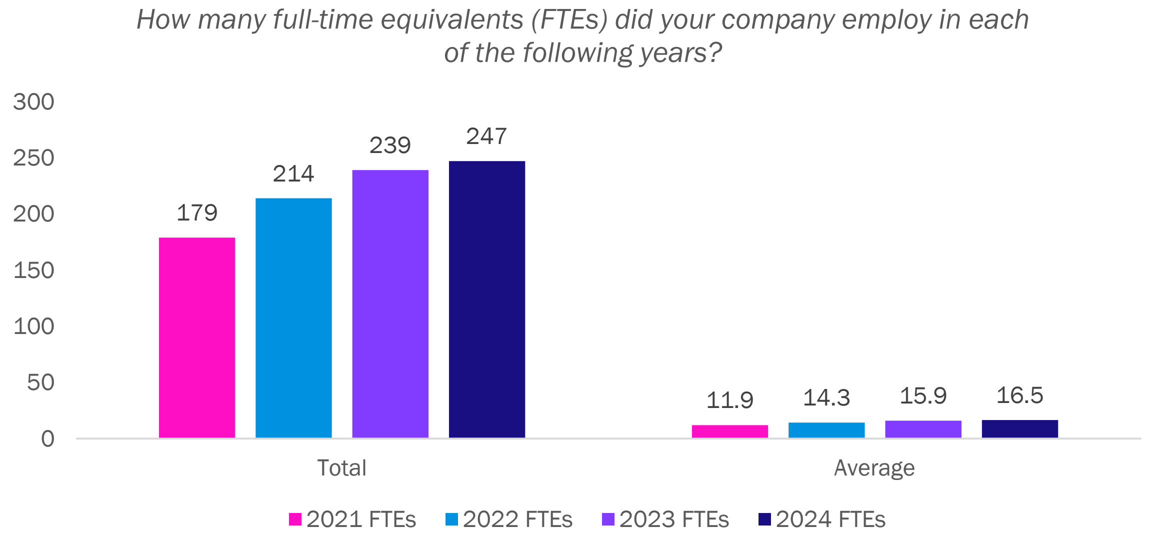
These increased enquiries appear to have translated into higher levels of business – and thereby income – for tenant companies, as evidenced by their steady growth in employment between 2021 and 2024, and after 2022 in particular.

Total employment, number of FTE jobs, across surveyed tenants and suppliers increased by 38%, from 179 in 2021 to 247 in 2024. Employment grew by 15% between 2022 and 2024. The average number of staff for each company also rose steadily between 2021 and 2024.

While the total and the average number of employees grew before the opening of TBY2, the data show that approximately half of the overall growth between 2021 and 2024 occurred after the opening of TBY2 in 2022. Furthermore, the fact that that fastest percentage growth occurred in 2022 is an indication that suppliers were already expanding their capacity under the knowledge that the opening of TBY2 was necessarily going to lead to increased business opportunities.

That being said, 2022 was a peak year for film and HETV production in the UK and displayed 10% year-over-year growth, so one cannot rule out the effect of overall demand for UK production services. However, the growth beyond 2022 ran counter to the wider sector that was experiencing declining levels of film and HETV production. From that, it is reasonable to conclude that the intervention helped local suppliers to buck the wider UK trend between 2022 and 2024.

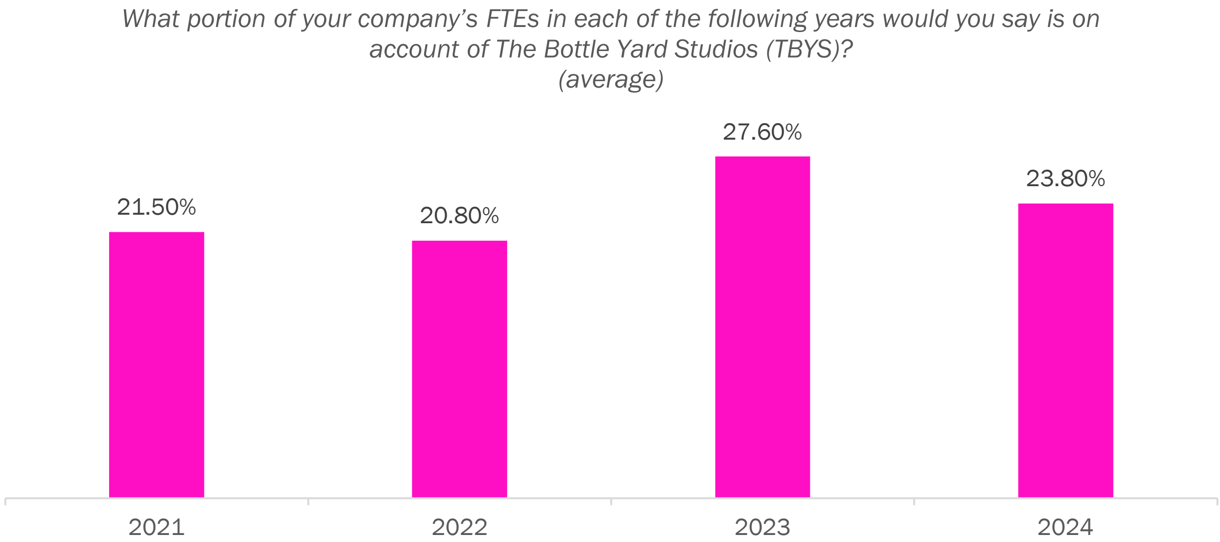
Figure 18: Employment at suppliers



Source: Nordicity online survey of tenants and suppliers
Note: Results are taken from a sample of 6 tenants of TBY1 and 11 suppliers

Production services suppliers reported that their work at TBYS accounted for between 20.8% and 27.6% of their total workforce. Combining the data for production services businesses' total workforce and the share attributable to TBYS suggests that these companies' employment increased from 45 in 2022 to 66 in 2023 – a 47% increase following the opening of TBY2. Across the UK's wider film and HETV production sector, the level of production actually fell year-over-year, although domestic UK film and HETV production increased. Either way, the intervention looks to have helped local suppliers grow at a rate that outpaced the overall market.

Figure 19: Supplier employment attributable to TBYS

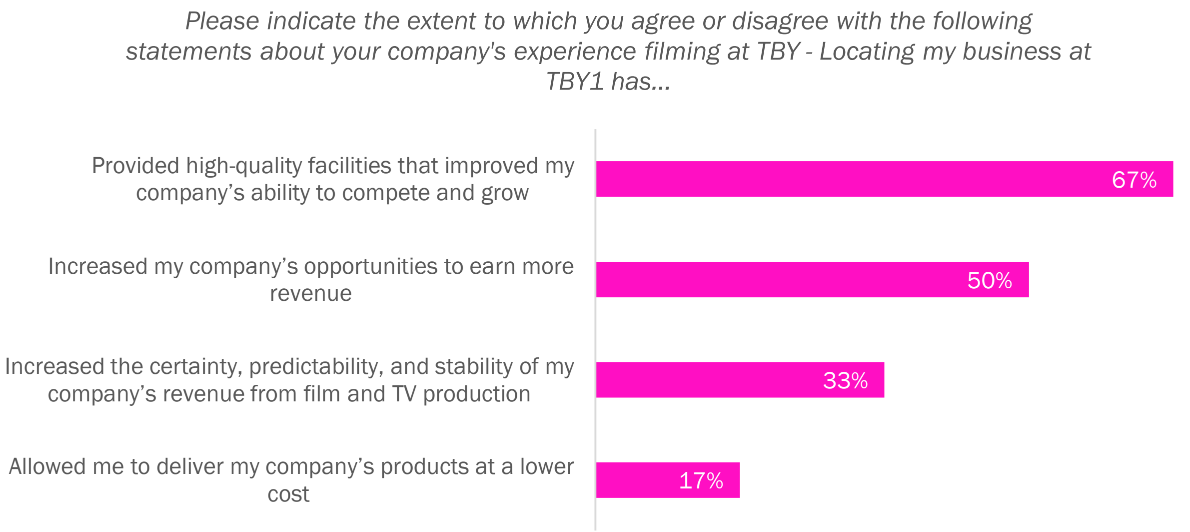


Source: Nordicity Survey of Tenants and Suppliers
Note: Results are taken from a sample of 6 tenants of TBY1 and 11 suppliers

The business benefits for tenants located at TBY1 were further borne out by those businesses' own perceptions. A majority of tenant businesses, 'strongly agreed' or 'agreed' that locating at TBY1 enabled their businesses to compete and grow (67%, 4), and half 'strongly agreed' or 'agreed' that it increased their opportunities to earn more revenue (50%, 3). TBYS has played a much lower role in increasing business certainty, predictability and stability for tenant businesses (33%, 2) and had only allowed one tenant to deliver cost-savings (17%, 1)

As well as these results, tenant businesses also reported that their company's turnover between 2022 and 2024 inclusive had been, on average, 17.5% higher than it would have been if they had not been based at TBY1.

Figure 20: Impact of TBY1 on tenant businesses



Source: Nordicity online survey of tenants and suppliers, tenants who 'strongly agreed' or 'agreed' with the statements.
Note: Results are taken from a small sample of only 6 tenants of TBY1, however, the results were generally aligned with remarks from interviewed tenants.

Similarly, the majority of supplier businesses based outside of TBY1 also reported that their supplying of film and TV projects filming at TBYS increased their opportunities to earn more revenue (91%, 10) and to even supply more projects filming outside of TBYS (64%, 7). However, once again, TBYS appears to have done less to increase business certainty for suppliers (36%, 4). When asked to quantify this impact on turnover if TBY did not exist, TBY tenants and suppliers reported on average, that their turnover would have been 19.5% lower over the past three years.

> **"The impact of The Bottleyard [sic] is imperative to the economic growth of the creative industries in the city and the wider South West region."**
>
> **- Tenant and supplier**

Figure 21: Impact of TBY1 on supplier businesses

Source: Nordicity online survey of tenants and suppliers, suppliers who 'strongly agreed' or 'agreed' with the statements.
Note: Results are taken from a small sample of only 11 supplier businesses.

Overall, production services businesses reported an uptick in the share of their annual turnover (i.e. income) attributable to TBYS, after the opening of TBY2. Their TBYS share of turnover increased from 21.8% in 2022 to 25% in 2023, and 26.8% in 2024. As well as this, across the surveyed sample of tenants and suppliers, the average reported increase in company turnover on account of the opening of TBY2 was 5.5%.

Table 22: Increase in turnover due to TBYS

Approximately what portion of your annual turnover in each of the past three years was earned from projects filming at TBY1 or TBY2?

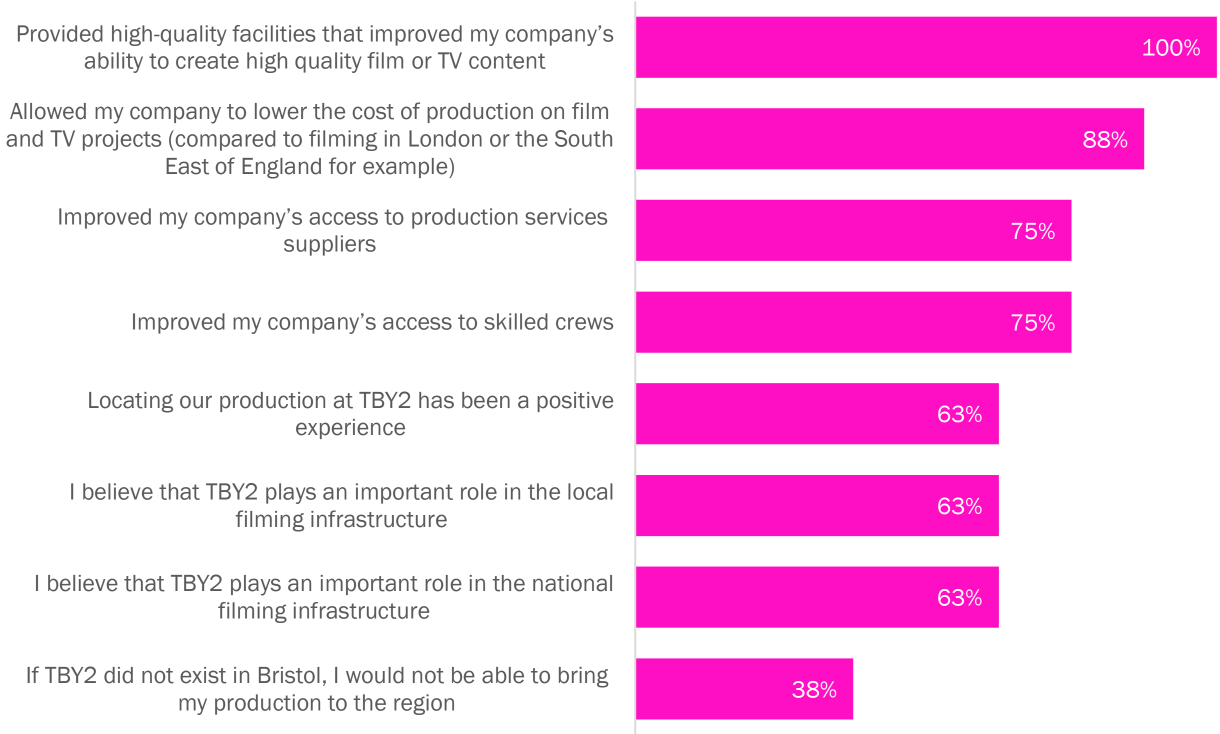
	2022	2023	2024
Average	21.8%	25.0%	26.8%

Source: Nordicity online survey of tenants and suppliers, % of annual turnover attributable to TBYS
Note: Results are taken from a small sample of only 6 tenants of TBY1 and 11 suppliers and results are only 'approximate' rather than actual figures.

While seven businesses said that their company's turnover was not higher on account of the opening of TBY2, 10 responded that it was higher on account of the opening of TBY2 – reporting increases of up to 50% higher. The 10 businesses providing support services who reported that their company's turnover was higher, on average reported that it was 8% higher on account of the opening of TBY2.

From the perspective of production companies filming at TBYS, 75% of those surveyed agreed that TBYS had improved their company's access to production service suppliers.

Figure 22: Production company perceptions of TBYS



Source: Nordicity online survey of production companies
Note: Results are taken from a sample of 8 production companies

4.4. Economic benefits (additional)

Employment

To estimate the gross number of direct, indirect and induced FTEs generated by this local production spending, Nordicity adopted the employment multipliers implied by the analysis found in the report, *The Bottle Yard Studios – Impact of Screen Expenditure on Bristol*, prepared by Olsberg-SPI for BBC in August 2020.

Table 23: Employment multipliers derived by Olsberg-SPI

	2015-16	2016-17	2017-18	2018-19	2019-20
TBYS					
Production spending (£)	--	13,776,750	11,573,500	12,800,000	12,948,000
FTEs					
Direct		99.2	82.4	90	90
Indirect		64.8	53.8	58.8	58.7
Induced		40.9	33.9	37.1	37.1
FTEs per £1m					
Direct		7.2	7.1	7.0	7.0
Indirect		3.5	3.5	3.7	3.4
Induced		2.2	2.2	2.3	2.2
Total		12.9	12.9	13.0	12.6

Source: Olsberg-SPI, *The Bottle Yard Studios – Impact of Screen Expenditure on Bristol*, August 2020

Nordicity applied a deflator index based on annual changes in the consumer price index (CPI) to extend the FTE multipliers from 2019-20 to 2024-25.

Table 24: FTE multipliers (FTEs per £1 million production spending)

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Direct	7.0	6.8	6.3	5.9	5.7	5.6
Indirect	3.4	3.4	3.1	2.9	2.8	2.8
Induced	2.2	2.1	2.0	1.8	1.8	1.8
Total	12.6	12.3	11.4	10.6	10.3	10.1
CPI index	108.9	111.6	120.5	128.6	132.9	138.2

Source: Nordicity estimates based on data from Olsberg-SPI and ONS

These FTE multipliers were multiplied by the estimated annual levels of production spending at TBY1 and TBY2 to estimate gross FTEs for direct, indirect and induced impacts.

Table 25: Estimated number of net FTEs generated by film and TV production at TBY1 and TBY2

	2020-21	2021-22	2022-23	2023-24	2024-25
TBY1					
Direct	42.5	48.2	46.6	74.3	96.4
Indirect	21.0	23.9	23.1	36.8	47.7
Induced	13.3	15.1	14.6	23.3	30.2
Total	**76.8**	**87.1**	**84.3**	**134.3**	**174.3**
TBY2					
Direct	--	--	10.7	44.7	31.8
Indirect	--	--	5.3	22.1	15.7
Induced	--	--	3.4	14.0	10.0
Total	**0.0**	**0.0**	**19.4**	**80.8**	**57.5**
TBY1 + TBY2					
Direct	42.5	48.2	57.4	119.0	128.2
Indirect	21.0	23.9	28.4	58.9	63.5
Induced	13.3	15.1	18.0	37.2	40.1
Total	**76.8**	**87.1**	**103.8**	**215.2**	**231.8**

Source: Nordicity estimates based on data from TBYS, BFO, Filming in England, Olsberg-SPI and ONS

The 75% additionality rate was applied to arrive at estimates of the net direct, indirect (i.e. supply chain) and induced impact employment generated by each studio facility and overall.

In total, Nordicity estimates that filming at TBYS generated 173.8 additional FTEs of employment for the WoE economy in 2024-25. This included 96.1 FTEs of employment directly within the region's film and TV production sector (i.e. crew and below-the-line cast employment) (Table 26).

Table 26: Estimated number of net FTEs generated by film and TV production at TBY1 and TBY2

	2020-21	2021-22	2022-23	2023-24	2024-25
TBY1					
Direct	31.9	36.2	35.0	55.7	72.3
Indirect	15.8	17.9	17.3	27.6	35.8
Induced	10.0	11.3	10.9	17.4	22.6
Total	**57.6**	**65.4**	**63.2**	**100.8**	**130.7**
TBY2					
Direct	--	--	8.1	33.5	23.9
Indirect	--	--	4.0	16.6	11.8
Induced	--	--	2.5	10.5	7.5
Total	**0.0**	**0.0**	**14.6**	**60.6**	**43.1**
TBY1 + TBY2					
Direct	31.9	36.2	43.0	89.3	96.1
Indirect	15.8	17.9	21.3	44.2	47.6
Induced	10.0	11.3	13.5	27.9	30.1
Total	**57.6**	**65.4**	**77.8**	**161.4**	**173.8**

Source: Nordicity estimates based on data from TBYS, BFO, Filming in England, Olsberg-SPI and ONS

Gross value added

To estimate the GVA generated by film and TV production at TBYS, Nordicity drew upon previous (unpublished) analysis of the economic impact of TBYS and the Bristol film and TV production cluster prepared for the British Film Commission (BFC). That research used multipliers for average spending per square foot of stage space and an input-output model of the UK economy (adapted to provide region- and local-level estimates).

The research and economic modelling for the BFC found that for every £1 million of film and TV production spending in Bristol, £890,000 of gross GVA is generated for the local economy, including

- £510,000 in direct GVA,
- £280,000 in indirect GVA and
- £90,000 in induced GVA.

These GVA multipliers were multiplied by the estimated annual levels of production spending at TBY1 and TBY2 – along with the 75% additionality rate – to arrive at estimates of the net direct, indirect (i.e. supply chain) and induced impact GVA generated by each studio facility and overall.

Based on this approach, Nordicity estimates that the filming at TBYS generated an additional 15.3 million in GVA for the region's economy in 2024-25 (Table 27).

Table 27: Estimated net GVA generated by film and TV production at TBY1 and TBY2 (£m)

	2020-21	2021-22	2022-23	2023-24	2024-25
TBY1					
Direct	2.4	3.0	3.0	5.0	6.6
Indirect	1.3	1.6	1.7	2.8	3.6
Induced	0.4	0.5	0.6	0.9	1.2
Total	**4.2**	**5.1**	**5.3**	**8.7**	**11.5**
TBY2					
Direct	--	--	0.7	3.0	2.2
Indirect	--	--	0.4	1.7	1.2
Induced	--	--	0.1	0.6	0.4
Total	**0.0**	**0.0**	**1.2**	**5.2**	**3.8**
TBY1 + TBY2					
Direct	2.4	3.0	3.8	8.0	8.8
Indirect	1.3	1.6	2.1	4.4	4.8
Induced	0.4	0.5	0.7	1.5	1.6
Total	**4.2**	**5.1**	**6.5**	**14.0**	**15.3**

Source: Nordicity estimates based on data from TBYS, BFO, Filming in England, Nordicity-BFC and ONS

4.5. Workforce Development

As part of the TBYS expansion at TBY2 and upgrading of TBY1, it was recognised that in order to increase the local impact, a workforce and skills strategy would be needed for the WoE to increase the number of the indigenous film and TV workers to fill the jobs created by the additional production activity. Moreover, there was a policy goal that the skills development particularly targeted underrepresented groups and residents of South Bristol.

The WDP was developed by external consultants as a one-year pilot that would then inform a subsequent continuation of the programme. There were two major aspects to this strategy: outreach to schools and colleges creating the aspirations to join the industry; and industry placements to provide the experience needed for entry into the industry.

Investment Fund and the West of England MCA's Mayoral Priority Skills Fund were used to provide industry access and pathways to people from backgrounds underrepresented in the film and TV industry, particularly from areas of deprivation in South Bristol. Funding was used to appoint an Outreach Coordinator, who identified relevant partners to deliver the WDP:

- TBYS partnered with Bristol Works, who already had established outreach channels into schools, to deliver workshops, career days and taster sessions to pre-16 students from disadvantaged backgrounds;
- TBYS partnered with Boomsatsuma, who already were established as an industry-focused training organisation and film school, operating at both further education (FE) and higher education (HE) levels, to offer training, bootcamps and work placements on productions filming at TBYS, particularly for people typically under-represented in the media sector;
- these developments opportunities provided access but were unpaid.

The WDP pilot that ran through 2024, provided three important learnings.

1. Training opportunities being unpaid resulted in a financial barrier to participation by young people in South Bristol, particularly those from lower income or financially insecure backgrounds.
2. There was a resistance by production companies to taking on work placement trainees who had had no training; and
3. Production companies had a lack of effective insurance and safeguarding policies which acted as a barrier to delivering work placements, for both the production companies and the parents of children, in delivering work placements, especially to under-18s.

For the placements that did occur, producers warned that some sort of effective preparation was needed to ensure work placements were set-ready for the fast-pace of the industry. These learnings were subsequently used to design All Set West – the skills development programme for new entrants that followed the WDP pilot.

All Set West is a skills package for the WoE region designed to support emerging talent to access opportunities in scripted film and television production. The programme was funded by the BFI National Lottery Places Fund and delivered by Bristol City Council's Film Services (i.e. The Bottle Yard Studios alongside Bristol UNESCO City of Film and Bristol Film Office) in partnership with the West of England Mayoral Combined Authority.

Expanding on the 2024 pilot, two cohorts benefitted from All Set West's 'set-ready' training in 2025, delivered in conjunction with local delivery partners. Training covered life skills and industry preparation to equip potential new entrants for the world of work, focusing on confidence-building, set etiquette, work-readiness, communication skills, teamwork, wellbeing and resilience, as well as the digital and financial literacy skills needed to be a freelancer. Participants also received 'green skills' training from experts on how to be sustainable in the film and TV industry. The updated programme was intended for cohorts of 30 residents from WoE's under-represented communities.

All Set West's package of support consists of the following and supports different stages of a pathway into the film and TV industry:

- **All Set West Outreach**: the All Set West team visit schools, colleges and employment events to increase awareness of the different careers available in scripted production.
- **All Set West Training**: a free 5-week training programme delivered at The Bottle Yard Studios and designed to give trainees the knowledge and skills to be 'set-ready' for work on scripted production.
- **All Set West Hub**: an online platform that provides signposting and information about employment opportunities, networking events, masterclasses, workshops and other helpful resources across the region. Provides ongoing peer to peer support to beneficiaries who are unlikely to have existing support networks.

All Set West's training was intended to provide recruiters with reliable industry-ready workers. Entry level industry skills were taught through workshops, panel talks and one-to-one sessions, and technical training was achieved by placements with local active productions. As many of these trainees came from different backgrounds that are typically underrepresented in the screen sectors, supporting them to succeed and stay in industry employment was an important focus.

All Set West training includes financial and digital literacy, as well as pastoral support via one-to-one wraparound guidance and signposting to resources that improve wellbeing and resilience of trainees. The All Set West Hub enables a sense of community and subsequent support after training is concluded.

As its intended beneficiaries may face multiple barriers to accessing the programme, All Set West has been designed with a ring-fenced Access Fund to help overcome such barriers. The fund is flexible and supports trainees with for example costs for travel, childcare, BSL/translation, support workers, IT equipment, mobile data, and clothing.

All Set West is highly praised and frequently cited as a best-in-class programme for new entrants. It offers clear expectations, pastoral support – often with a very high degree of industry buy in. The 5-week training programme goes well beyond technical skills and offers trainees help with confidence building; set etiquette and work-readiness; communication skills and teamwork; wellbeing and resilience; financial literacy; freelancer preparation. Beyond training, it also supports tangible work placements on local productions, helping over three quarters of trainees across successive programme iterations to secure employment in film and TV roles.

Table 28: Skills development outputs

	Additional output targets by end of project	Actual outputs by March 25	Percentage change
Number of trainees, college and university students, and school pupils taking part in careers talks, tours and work experience activities led by TBYS.	392	392	100%
Apprenticeships*	42 weeks	72 weeks (29/07/21 to 21/11/22)	171%

* These outputs were not part of the WDP but additional to it.

Given the pivotal role the Outreach Coordinator played in facilitating delivery of the WDP and All Set West, as well as their general outreach role (when some producers have their own training schemes or need trainees for various departments on a new production) producers have commented on how they have been able to draw upon the Coordinator's knowledge and experience. It was also commented that the Coordinator was viewed as a partner in helping the production develop and deliver on any training or skills goals they had.

4.6. Operational performance of TBYS

Facilities

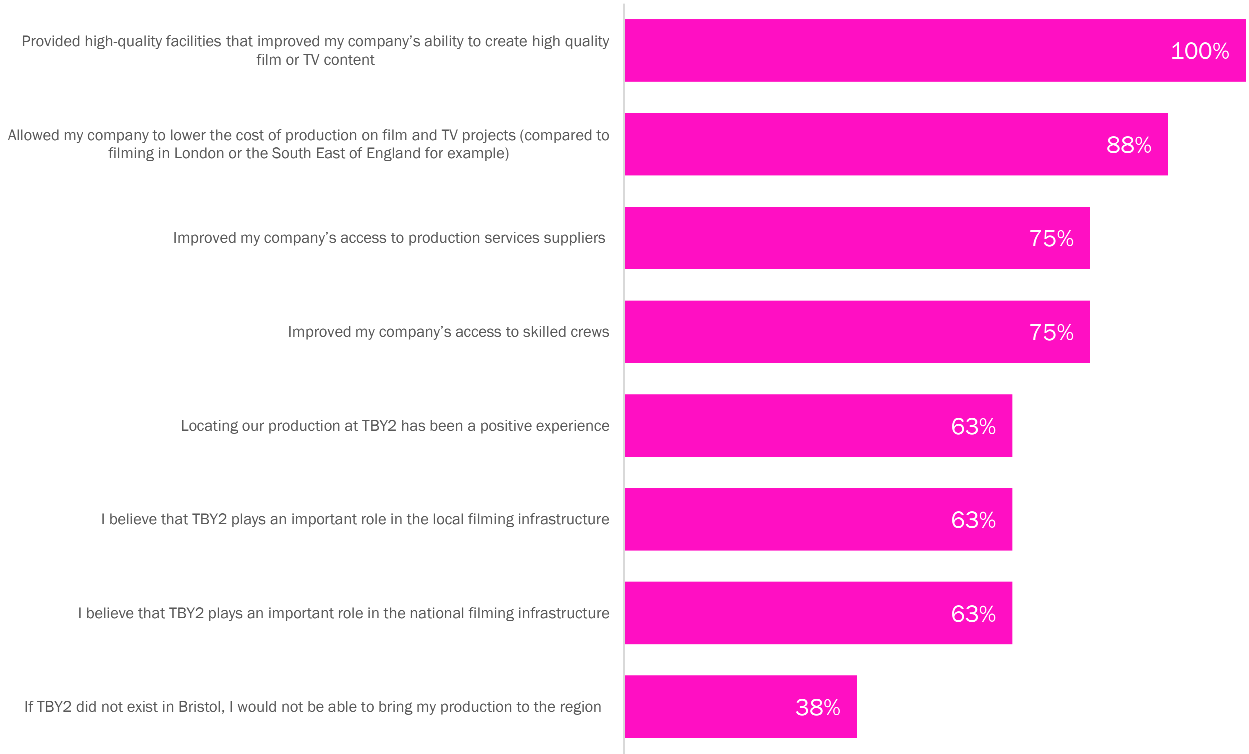
Several stakeholders acknowledged that the refurbished TBY1 had been improved, especially in terms of usability and support from staff. However, despite the renewal improvements, roof leaks, poor soundproofing, limited heating and parking remained issues in places at the TBY1 site. Nonetheless, overall, according to producers and other stakeholders, TBY1 offers an important budget-friendly option for domestic film and TV producers.

Figure 23: Producers' rating of TBY1 facilities

Source: Producer Nordicity online survey of production companies
n=4
1= Poor, 2=Fair, 3 = Good, 4 = Very good, 5=Excellent

Overall, 100% of the production companies surveyed agreed with the statement that TBYS provided high quality facilities that improved their company's ability to create high quality film or TV content. 88% of companies agreed that TBYS had allowed their company to lower the cost of film and TV projects, compared to filming in London or the South East of England for example.

Figure 24: Production company perceptions of TBYS

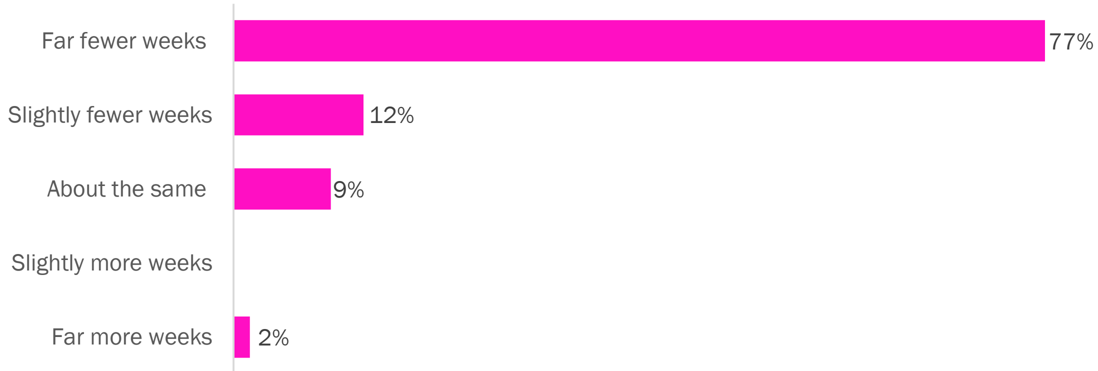


Source: Nordicity online survey of production companies
Note: Results are taken from a sample of 8 production companies

From the perspectives of cast and crew working on productions at TBY1, the vast majority (89%) of those surveyed believed that were it not for TBY1, they would have had fewer weeks of paid work in film and TV production in the Bristol area between January 2022 and August 2024, highlighting the role TBY1 has in supporting production employment in the area.

Figure 25: Impact of TBY1 on cast and crew employment in film and TV production

If The Bottle Yard Studios did not exist, how do you think your total weeks of paid work in film and TV production in the Bristol area would have differed over the period January 2022–August 2024?



Source: Nordicity online survey of local cast and crew
Note: Results are taken from a sample of 65 crew

Management and governance

Stakeholders were very positive about the management team at TBYS, who were viewed as responsive, flexible and solution-oriented. Stakeholders highlighted TBYS management team's collaborative and supportive approach, and how they work closely with film and TV productions to accommodate their scheduling and filming needs – TBYS were seen as partners. These findings are supported by the survey results, where 63% of production companies, 76% of tenants and suppliers and 80% of cast and crew 'agreed' or 'strongly agreed' with the statement that engaging with TBYS staff had been a positive experience.

Stakeholders also noted the high ethical standards and transparency of the TBYS management team. Specifically, the team is viewed as fair in their approach to pricing, which is a major draw for budget-sensitive independent producers.

TBYS can now operate as a twin hub for major HETV production and domestic broadcaster production – the former has been enabled by the opening of TBY2 and TBY1 is still viewed as critical by many domestic producers for the latter, as the improved facilities still fall within the budgets of their UK broadcast commissions.

In regard to production services, TBYS operates a non-exclusive supplier model, whereas, many large film studios near London insist that producers only use co-located production services suppliers, which invariably fosters monopolistic practices. In contrast, TBYS allows producers to use any production services suppliers, producers value this flexibility and it contributes to the affordability of TBY1, and therefore, their production getting made.

Despite, the non-exclusive supplier model, TBYS is highly cognisant of trying to retain as much of the economic activity stimulated by screen production within the WoE. Consequently, it maintains a detailed suppliers list, some of which are present on site or in Bristol and the wider region. Production companies have commented that TBYS will work closely with their productions to maximise the local sourcing of goods and services. Consequently, the non-exclusive supplier model and focus on local suppliers results in a competitive environment for suppliers within the WoE versus suppliers from further afield. This minimises inflationary monopolistic practices and enhances Bristol and the WoE region's competitive position in comparison to London and other regions and nations. Seven of production companies who responded to the producer survey (i.e. 88%) 'strongly agreed' or 'agreed' that TBYS allowed their company to lower the cost of production on film and TV projects. A further 75% (6) 'strongly agreed' or 'agreed' that TBYS improved their access to production service suppliers, and 75% (6) 'strongly agreed' or 'agreed' that TBYS improved their access to skilled crews.

The establishment of TBY2 has also resulted in increased tenure at TBY1.[13] Real SFX– a multi-BAFTA- and Emmy Award-winning special effects company based in South Wales – specifically chose to open a second branch at TBY1 due to the opening of TBY2 in anticipation of future high quality HETV productions coming to Bristol. Also, Boomsatsuma – an independent education provider based in Bristol and the South West across television and filmmaking, photography, game design, digital media and sports media – had doubled its footprint at TBY1 from 2023 to 2024. Both of these suggest a measure of success for TBYS as a result of the expansion to TBY2 and ongoing workforce development opportunities.

[13] TBYS only hosts tenants (services, suppliers and production companies) at the TBY1 site not TBY2.

Investment Fund financing has not only allowed investment in an affordable technically specialised facility (TBY2) that can support the growth of start-ups and scale-ups in keeping with one of the rationales present in the Fund NEF but it has also provided investment that has not only maintained TBYS' market position but also widened it. By providing such investment, it has enabled BCC to continue its public ownership of TBYS without having to resort to private investment, which may have diminished the local impact and local workforce focus that the council brings, which a private enterprise would not necessarily. Stakeholders similarly noted that BCC ownership meant that TBYS was in a better position to maintain affordable pricing (commensurate with the specification of facilities), support workforce development initiatives and ensure there was community engagement.

Environmental performance

Productions and on-site productions services companies noted an unrelenting commitment to environmental sustainability across both TBY1 and TBY2. This is an increasingly important for different areas of the industry, from independent producers to global media companies. Even for cost-sensitive producers, the actions that TBYS has taken in the field of sustainability has helped them achieve BAFTA albert accreditation for their productions.

TBYS encourages productions to use local suppliers and promotes a circular economy that minimises resources being brought from further afield than is necessary. TBYS achieves this through a detailed suppliers list and encouraging productions to engage with of locally based Heads of Department, who in turn, tend to recruit local teams.

BAFTA albert is the lead UK organisation that aims to 'support the film and TV industry to reduce the environmental impacts of production and to create content that supports a vision for a sustainable future'. It offers various online tools, training, events and practical guidance, as well as thought leadership. 'BAFTA albert certification' is the industry standard for sustainable production in film and television.

To attain the certification (and therefore to be able to include the logo in screen credits), productions must submit a Carbon Footprint (which measures their environmental impact) and a Carbon Action Plan (which evidences how each production will take steps to minimise their environmental impacts). As a result of the work that TBYS has undertaken, productions (especially small ones) filmed at TBYS are able to observe and record good, sustainable environmental practice. This learning can then be carried forward by the production company to future productions, even if they are not filmed at TBYS.

Table 16 lists the environmental awards and accreditations that TBYS has achieved. These are important for both global streamers, which look for operational commitments to environmental sustainability when commissioning productions and domestic producers, which are required to achieve BAFTA albert certification.

The ethos of TBYS's management team and clear commitment to sustainability and green credentials, has been another factor in attracting production services companies such as Real SFX – a multi-BAFTA- and Emmy Award-winning special effects company based in South Wales – to locate a second branch at TBY1.

Wider Impact and added value

According to stakeholders, the opening of TBY2 has elevated Bristol and the WoE's credibility and reputation as a regional production hub. TBY2 has allowed the region to attract the types of higher-budget HETV dramas typically commissioned or co-commissioned by global streamers such as Disney+, Amazon and Netflix. Prior to TBY2, these types of productions would stay in London, or use studio facilities in Cardiff, the North West, Scotland or Northern Ireland.

The filming of these types of higher-budget scripted TV programmes at TBY2 brings a significantly higher level of local economic benefits, through larger crews and increased use of production supplies and services, which are often locally sourced.

At the same time, the repair and renewal works at TBY1 are also seen as important to Bristol's attractiveness as a production hub, as they have helped to maintain a studio facility that the production industry views as well-suited to budget-sensitive production, often made by independent producers, and in many cases, for the BBC or other public service broadcasters. In this regard, TBY1 continues to make a positive and increasingly critical contribution to industry by offering quality space at an appealing price point.

In both respects, TBY2 and TBY1 are not only furthering the economic and cultural policy goals of the WoE, but also contributing to central government's ongoing policy of diversifying film and TV production away from London to other regions and nations of the UK.

4.7. Performance against the Full Business Case

Performance against the Full Business Case is captured here with the output results and a summary assessment of the outcome targets.[14]

The output targets were largely met.

Table 29: Project outputs to Quarter 4, 2024-25 (end of March 2025)

	Planned outputs by end of intervention	Actual outputs by end of March 2025	Percentage change
B1 workspace converted to film & TV studio at Hawkfield Business Park (TBY2)	7,600 m^2	8,477 m^2	112%
Renewal and repair works at existing Bottle Yard Studios site near Hengrove Park (TBY1) (Main Warehouse)	18,500 m^2	22,440 m^2 (additional Export Warehouse and Energy Centre) The various elements of renewal and repair were delivered at four delivery points: 2021, June 2023, June 2023, and July 2023[15]	121%
Development of a Workforce and Skills Strategy	Outreach co-ordinator role employed	Outreach co-ordinator role was employed	n/a
	Key partnerships developed (e.g. UWE, Knowle West Media Centre, City of Bristol College, ScreenSkills	Key partnerships were developed with Boomsatsuma and Bristol Works	n/a
	Pilot programme	A pilot programme was run and has led to the All Set West skills development programme	n/a
	Provision of creative media trainee placements:[16]: Total 45 placement 21/22 (6 months) – 20 placements 22/23 (6 months) – 25 placements	45 placements	100%
	Total 1665 hours: 21/22 (6 months) – 740 hours 22/23 (6 months) – 925 hours	*585 hours*	-35%

[14] Greater detail can be found in the Gateway 2 report that was submitted to government.

[15] Additional bespoke repairs were planned for completion in February 2024 and phase 2 of refurbishment of production occupied spaces to accommodate bookings was planned for completion by August 2024. All works were actually completed by March 2025.

[16] The LEF did not stipulate the number of placements or the hours spent at TBYS that needed to be provided; this target was added later, as mitigation for the difficulty in achieving the 1,655 target.

Table 30: Intended outcomes for TBYS investment

	Intended outcome	Outcome judgement	Additionality judgement	Strength of evidence
1	108 net jobs through construction at TBY2	Not achieved and not expected*	Partially	Medium
2	£6m GVA generated through TBY2	Not achieved and not expected*	Partially	Medium
3	Social Value outcomes through Construction Contract commitments	Mostly achieved	Fully	Strong
4	Increased screen production capacity (through TBY2)	Fully achieved	Fully	Strong
5	Increase in expenditure through screen production activity (through TBY2)	Mostly achieved	Mostly	Limited
6	Sustained screen production capacity in TBY1	Not achieved and not expected*	Partially	Medium
7	Sustained expenditure through screen production activity in TBY1	Mostly achieved	Partially	Limited
8	27 net jobs related to the renewal construction at TBY1	Fully achieved	Mostly	Medium
9	£1,499,040 GVA generated by the renewal work at TBY1	Not achieved and not expected*	Partially	Medium
10	Growth in businesses providing support services	Mostly achieved	Mostly	Limited
11	In the first 5 years of operations, 25% of direct jobs in TV and film production should be recruited from local South Bristol residents	Partially met	Unable to say	Medium
12	In years 6 to 10 of TBY2 operation, 50% of direct jobs in TV and film production should be recruited from local South Bristol residents	Not applicable	Not applicable	Not applicable
13	Minimum of 80.5 Indirect jobs recruited from local South Bristol residents by 2027	Not achieved	Mostly	Limited
14	Minimum of 50% of total indirect jobs created (i.e. in supply chains) should be recruited from local South Bristol residents	Fully achieved	Partially	Limited

Source

* Methodology provided in the FBC upon which the targets were based, did not take into account leakage and displacement appropriately, whereas, they have in this report. The FBC methodology would have overstated the outcomes.

While the renewal and repair works at TBY1 have taken place over a longer period than intended, the anticipated closures of stages due to the Hengrove Park housing development did not occur and so the delayed works had very limited impact on the ongoing use of the TBY1 site and infrastructure.

The construction phase of TBY2 was completed on time and on budget. TBY2 was handed over to the TBYS Management Team in October 2022 and all operational resourcing and management arrangements were in place by the opening in November 2022. A total of 8,477 m^2 of B1 workspace was converted into a film and TV studio space.

In terms of resourcing, the intervention did contract BEC to build and operate a planned PV array bringing in nearly £40,000 of additional match funding and BCC was able reduce its match funding for the array by approximately £60,000.

The total planned budget was £13.544 million (£11.817 million Investment Fund and £1.726 million BCC match funding). Actual total project spend was £13.57 million, which was £0.026 million (0.19%) higher than the planned total project spend. The actual spend included £11.842 million from the MCA Investment Fund (£0.025m or 0.17% higher than planned spend), £1.73 million from BCC (i.e. equal to the planned spend).

Table 31: Project expenditure to Quarter 4, 2024-2025

Funding source	Planned spend by 31 March 2025* (£m)	Actual spend by 31 March 2025 (£m)	Difference between planned & actual (£m)	% difference between planned & actual spend
Devolved funds MCA Investment Fund	11.817	11.842	+0.025	+0.21%
Public match BCC Funds	1.726	1.726[17]	0	0%
Total	13.544	13.57	+0.026	+0.19%

Source: Appendix 6 - Bottle Yard LEF 20-07-23 (003)
* Data at the time of the Mid-term Gateway Review.
Totals may not sum exactly due to rounding.
Investment Fund CG Bottle Yard Studios – Hawkfield Business Park Highlight Report – March 2025

4.8. Revision of Hengrove assumptions

In order to address some of the deprivation in South Bristol, the MCA had committed to the development of at least 1,400 new homes at Hengrove Park (also funded with Investment Funds). The TBY1 site was situated adjacent to Hengrove Park and because of the lack of soundproofing in some of TBY1's older buildings, it was anticipated that that during the initial construction of the housing, four of its studios would have been rendered inoperable, and then a further two later in the construction period. Hence, the intervention to set up TBY2, in part to create extra stage space that could be used when stage space at TBY1 was unavailable, leaving an asset that in the longer term would provide additional stage space at TBYS.

However, as the Hengrove Park housing development has been delayed, TBY1 has not had to close down studios as a result of the anticipated noise and or vibrations. Therefore, repairs went ahead with limited disruption to the ongoing use of the TBY1 site and infrastructure. No tenants have had to relocate because of the renewal works at TBY1.

Nonetheless, the planning permission remains in place for the housing development. Only very basic preliminary works have been conducted and it is thought that housebuilding may start within the next six months. When the housebuilding does start, it is now thought to be unlikely to affect TBY1. given that piling work will now no longer be required, therefore the risk of vibration has been removed. As the housing development is council-led, any disruption hopefully can be minimised by liaison between TBYS and the Hengrove Park development, including careful mutual scheduling as was successfully achieved

[17] Comprising BCC Capital, BCC Insurance Funds and additional funding from BEC as described in Table 1.

with the South Bristol Workspace project (also funded through the Investment Fund), which avoided vibration and noise during critical filming times at TBY1.Therefore, there is no need to model the impact of the loss of any stage space at TBYS once housebuilding on the Hengrove Park developments starts.

Therefore, there is no need to model the impact of the loss of any stage space at TBYS once housebuilding on the Hengrove Park developments starts.

5. Conclusions

5.1. Performance against the Full Business Case

The conversion of the building at Hawkfield Business Park (TBY2) was delivered on time.

The renewal and repair works at the original studio site (TBY1) were delayed. The commencement date was as per milestone but the delivery timeline was extended when the cost of the original procurement of roof works was found to be unaffordable, and so, a scaled-back version of works had to be reprocured. The remaining budget was rescheduled to best support commercial opportunities and activities at TBY1 whilst respecting delivery team resource, which took the works up to March 2025.

However, as the Hengrove Park housing development has been delayed, TBY1 did not have to close any studios as a result of the anticipated noise and vibrations and the works themselves caused limited disruption to the ongoing use of the TBY1 site and infrastructure. Looking to the future, it is now anticipated that when housebuilding starts at Hengrove Park it is unlikely to disrupt operations at TBY1, given that vibrations from piling work is no longer anticipated. No tenants have had to relocate because of the renewal works at TBY1.

The actual total project spend was £13.57 million, £0.026 million (0.19%) higher than the planned total project spend of £13.544 million.

Considering just the construction aspect of the intervention (i.e. the renewal and repair works at TBY1 and the conversion of the building that became TBY2), there were positive economic outcomes that resulted from the construction activity. However, an amended version of the economic impact modelling found that these positive economic impacts fell short of the targets set for construction employment and GVA. Nonetheless, the construction works generated a total GVA of £ 1,674,714 (£976,518 + £6,698,196) and a total net jobs of 107.28 (15.64 + 91.64).

The evaluation evidence did however indicate that the project has delivered ongoing positive additional economic benefits for Bristol and the WoE region. Stakeholders have clearly noted how TBY2 has not only increased TBYS's overall capacity and the region's production capacity but it has also enhanced WoE's reputation as a regional production hub in the UK.

TBY2 has allowed TBYS and the WoE region to attract higher-budget scripted high-end TV (HETV) productions, including productions typically made for global streaming services. This was not possible when TBYS offered TBY1 alone, as the soundproofing and physical conditions were not of a sufficiently high standard for such higher-budget HETV. These types of productions not only lead to increase in production activity, they also raise the economic intensity of the region's production activity because they often spend more on average per filming day on larger crews and more extensive production supplies and services.

This heightened economic impact is evident by the positive outlook of local crews and the recent expansion by several of the production services suppliers, both tenants of TBY1 and non-tenants but who are located elsewhere in Bristol and the wider WoE region. Two-thirds of crew reported that they would be working fewer weeks per year in film and TV production, if TBY2 did not exist. According to the survey of tenants/suppliers, the majority of suppliers experienced an increase in queries since TBY2 opened. Two-thirds of tenants reported that their tenancy increased their opportunities to grow their businesses. Employment at suppliers increased by 38% between 2021 and 2024, with the share of that increasing employment attributable to TBYS trending higher during that period.

These HETV projects and their associated economic benefits would not have come to Bristol without TBY2 – 63% of production companies agreed that without TBY2, they would not have been able to bring their production to the region.[18] TBY1 continues to provide a more cost-effective stage offer, which is more suited to budget-sensitive TV productions.

Filming days data provided by TBYS and BFO also clearly indicate that the opening of TBY2 provided the additional stage capacity to attract £7.9 million in estimated gross local film and TV production spending in 2023-24. After applying the 75% additionality rate developed for this analysis, an estimated £5.9 million in additional film and TV production spending was attracted to the region by TBY2 in 2023-24.

Perhaps more importantly, there is evidence from producer interviews that the opening of TBY2 has helped to attract larger projects to TBYS, with spillover of local production to TBY1. This is evidenced by the fact that after the opening of TBY2, the estimated level of local production spending at TBY1 rose by 80%.[19]

Moreover, the annual average level of production spending at TBY1 in the two years after the opening of TBY2 (£15.9 million) was nearly three times the average observed in the two years prior to the opening of TBY2 (£4.8 million) clearly contrasting with the situation across the UK, which in 2023-24 was severely impacted by the actors' and writers' strikes in the US and by the post-strikes slump of 2024-25. The repair works at TBY1 would have contributed to this as well, though these were delivered over a much longer period of time and weren't complete until March 2025. This strongly suggests an eminence for TBYS and its market position that bucked the UK-wide trend.

Nordicity's own modelling of the economic impact of this increased local spending on film and TV production indicates that, after adjusting for additionality, the annual GVA impact of TBYS rose from an average of £3.1 million prior to the opening of TBY2 (2020-21 and 2021-22) to £12.3 million after the opening of TBY2 (2023-24 and 2024-25).

The rate of employment supported by TBYS followed a similar pattern. After adjusting for additionality, Nordicity found that the annual employment impact of TBYS rose from an average of 51.2 FTEs prior to the opening of TBY2 (2020-21 and 2021-22) to 162.9 FTEs after the opening of TBY2 (2023-24 and 2024-25).[20]

[18] the remaining 3 production companies did not know or the question was not applicable, no production company surveyed disagreed with this notion

[19] It is reasonable to conclude that this spillover of production spending was due to the opening of TBY2 for the following reasons: The rate of increase of local production spending at TBY1 outpaced the UK-wide trend, following the opening of TBY1; (ii) the stakeholders interviews noted how large-budget projects attracted to TBY2 often also hire space at TBY1

[20] Note that this local employment refers to employment across the wider West of England region, including South Bristol. The survey results indicate that approximately 22% of the employment impact was within South Bristol.

5.2. Qualitative benefits

Since the inception of the project to develop TBY2, consideration was given to how more of the potential economic benefits of increased levels of film and TV production at TBYS (and any concomitant location shooting) could be retained within South Bristol and the WoE more widely. Increasing the local skilled workforce was seen as a way of increasing the regional GVA impact and offering better quality and higher paid jobs which over the longer term should provide more secure careers. In addition, in order to reduce economic disparities within Bristol in particular but across the WoE as well, there was an intention to ensure that barriers that might exist for groups underrepresented in the media world would be addressed in any skills development initiative for new entrants into the industry.

Moreover, it was also recognised that any actions to increase the local workforce for film and TV would need to entail more than developing access routes and training but a programme of outreach as well, so as to develop the aspirations in the students to join the industry but also in the wider community, so that families would be more supportive of entry into the sector.

This was largely new territory for both BCC's Film Services and the MCA, and so a stepped approach was taken: an Outreach Coordinator was appointed with responsibility to develop outreach into the underrepresented communities in South Bristol and across the WoE more widely, to create access routes into the industry through a skills development programme and firstly to identify effective partners that would help deliver these goals. Bristol Works facilitated outreach into schools and Boomsatsuma facilitated the delivery of a skills development programme access route. Initially a pilot trial was run - the Workplace Development Programme (WDP) – which was then used to inform the design of a longer-run programme – All Set West. The outputs, outcomes, survey results and interviews all point to the WDP being well-received; the programme since has gone on to win an industry recognised national award.

5.3. Absolute additional performance

By and large, the evidence suggests that the additional economic benefits will continue into the future. Despite potential policy shocks, such as potential trade tariffs by the US administration on film and TV production services, the UK is likely to remain a preferred destination for global production companies, including the global streamers. A number of these are actively investing in their own studios or where they retain long-term leases (e.g. WBD at Warner Bros. Studios Leavesden; Netflix at Longcross Studios; Amazon-MGM at Bray Studios; Sky/NBCUniversal at Sky Studios Elstree North), suggesting the economics, skills provision and other factors of the UK are still favourable. And this is in an environment in the US where state and federal authorities are encouraging repatriation of more screen commissioning to the US. Therefore, it is reasonable to assume that the other global production companies will be of a similar view.

Looking backwards, our analysis of the additionality of the film and TV production attracted to TBYS was consistent with the analysis in the FBC (90% additionality) albeit at a more conservative level (75%) to better reflect displacement. Looking into the future we expect the rate of additionality to remain at this high level.

Within the UK, TBYS will remain one of the best-positioned studio facilities outside the South East. In comparison to studio facilities elsewhere in the UK outside the South East, TBYS is the most accessible to London, while also giving visiting producers and talent access to skilled and deep local crew base, and a range of attractive filming locations. The UK-wide domestic commissioning slump that occurred following the Hollywood actors’ and writers’ strikes, did not affect TBYS in the same way as other studios. As already stated, the annual average level of production spending at TBY1 in the two years after the opening of TBY2 was nearly three times the average observed in the two years prior to the opening and despite a similar commissioning contraction by the global production companies, TBYS was nonetheless able to still attract commissions or co-productions from the likes of Apple TV+, Disney+ and Amazon.

TBYS would seem to have quickly expanded its ‘offer’ as an independent film and TV hub to a twin hub with HETV too.

That being said, there are risks to this outlook. The outcome of the US administration’s trade policy actions and any general erosion of the UK competitive position as a global filming hub would trickle down and dampen any future economic benefits of TBYS.

With or without these global market forces, there is also a risk that TBYS could experience a diminished competitive position within the UK’s regional stage market, should other purpose-built studios or high-quality converted spaces emerge in other parts of the UK. However, given the tight credit conditions, the next cycle of studio construction and expansion may be some years off, providing a window of opportunity for TBYS to entrench its new market position.

The Hengrove Park housing development was one such local risk but even if housebuilding should start within the next six months as has been suggested, it is now unlikely to significantly affect production activity at TBY1.

As this analysis shows, while TBY2 has helped significantly expand film and TV production activity in Bristol and the West of England, TBY1 is still a crucial base for even higher levels of annual production spending. Without TBY1 operating at baseline capacity, the annual level of film and TV production spending and economic benefits would be commensurately reduced for Bristol and the WoE.

Appendices

Appendix A: List of stakeholder consultees

Table 32: List of stakeholder consultees

Stakeholder group	Consultees	Interviews conducted
Film offices and local authorities	Business Operations Manager, TBYS Head of Film, BCC Bristol Film Office Manager, BCC Industry Outreach Co-ordinator, BCC MCA, Skills Regional Outreach MCA, Creative Industries Project Manager Bath Film Office Manager	7
Local production companies	Aardman Happy Hour Productions (Branded content + 1 feature film) Sid Wild Productions (Drama development, set up 2022) * BBC Natural History Unit and Factual Productions Strong Film & TV (Drama – int, 2024)	5
UK independent production companies	Happy Prince - Drama, (Rivals, Disney+) Big Talk Studios - Drama (The Outlaws, BBC/Amazon Prime Video) 60Forty Films - Drama (Down Cemetery Road, Apple TV+) Snowed-In Productions - Drama (Possession, Sky) Mammoth Screen (Drama, The Forsytes, 5/Masterpiece) Susceptor Films - Drama (The Undertaker- feature film)	6
US inward investment production companies	Paramount+ Apple + WBD (Warner Bros. Discovery) Wall to Wall Netflix	5
Tenant businesses	Bristol Costume Services (Costume) Real SFX (SFX) Films@59 (Post production) Sid Wild Productions (Drama development, set up 2022)	4
Local supply chain companies	VI (Visual Impact) Rental (Film equipment)* Films@59 (Post production)* KN Office (office facilities) Distortion Studios	4
Local accommodation providers	Harbour Hotel	1
Local location shoot site	Clifton College	1
Freelance production crew	Local Location Manager Unit Production Manager Prop Master	3
Newly established Bristol screen sector businesses	Distortion Studios Strong Film & TV (Drama – int, 2024)	2
Employment and skills partners	Boomsatsuma Bristol Works Production company that accepted placements (60Forty)	3

Stakeholder group	Consultees	Interviews conducted
Wider industry organisations/ stakeholders	RTS West of England / UWE (Creative and Cultural Industries Engagement) Invest Bristol & Bath Aardman PACT (John McVay, Chief Executive) BAFTA albert Production Guild of Great Britain	6

* Tenants on the TBY1 site

Appendix B: Construction Phase economic impact assessment calculations

Construction Phase Jobs and GVA outputs

BCC Economic Development Team have run calculations based on expenditure and using the updated ONS 2022 data for productivity per construction job.

Table 33: Baseline Calculations (original values identified in FBC)

Site	Construction Jobs	Construction GVA
Hawkfield	108 net jobs	£5,996,160
Bottle Yard Studios	27 net jobs	£1,499,040

Source: FBC

Table 34: Expenditure to date (with associated Jobs and GVA calculations

Site	Construction Spend	Fees	Total Expenditure and outputs
TBY2 (Hawkfield) Expenditure between December 2021 and December 2022 (including fit out works)	Main Contract: £5,602,013.50 Fit Out Works: £254,398.42 Total: £5,856,411.92	£408,750.82	£6,265,162.74 FTE Direct Jobs 6.265x10 = 62.65 Add Indirect/induced Jobs 62.65 x 1.97 = 123.42 Deduct DDL (deadweight etc) 123.42 x 0.9 = 111.08 total Total GVA (12 months works) 111.08 x £63,885 = £7,096,346
TBY1 (only very minimal fees so not separated) (to date)	£1,069,290.29		£1,069,290.29 FTE Direct Jobs 1.069 x10 = 10.69 Add Indirect/induced Jobs 10.69 x 1.97 = 21.06 Deduct DDL (deadweight etc.) 21.06 x 0.9 = 18.95 total Total GVA (12 months works) 18.95 x £63,885 = £1,210,621 Combined sites GVA = £8,306,967

Source: FBC

Methodology Statement (Based on the original FBC statement but with updates to methodology and outputs)

The HCA Best Practice Note on Calculating Cost Per Job has been used to estimate job creation and GVA from the refurbishment phases on both sites – see Microsoft Word - CPJ BPN 2015 3rd Edition - Final. This provides (page 9) cost coefficients showing the direct employment to cost ratios for different types of construction project. The 'private – industrial' project ratio of 10 FTE jobs per £ million of construction capital cost has been applied to the £7.334m total construction cost (inc. professional fees) for the Hawkfield and TBYS refurbishments, giving 73.34 direct jobs (gross) per construction year. The main refurbishment programme has a duration of 12 months, including fit out. To calculate the indirect and induced jobs, an employment multiplier for the construction sector of 1.97 has been used (note: no change/ update on ONS, 2015 data) , which is sourced from the Type 1 UK Employment Multipliers and Effects (ONS, 2015), giving a total of 144.5 direct, indirect and induced jobs (gross). This figure has then been discounted by 10% to account for deadweight, displacement and outside West of England leakage (mainly) – on a similar basis to the film/tv production jobs, giving **130 net jobs in total** (direct/indirect/induced).

The GVA related to the 130 net jobs in total has been calculated from the average productivity value in the UK construction sector (ONS, Labour Productivity Tables, 2021), which is **£63,885** per filled FTE job (note: updated ONS 2022 data for productivity per construction job) . The total GVA generated by the refurbishments programme therefore amounts to **£8,306,967.**

Appendix C: Nordicity film and TV production analysis

Number of projects

Data for the number and type of film and TV projects hosted at TBY1 and TBY2 between 2020-21 and 2024-25 was sourced from TBYS. Projects were coded by TBYS and BFO in accordance with the Filming in England rate card. The rate card provided estimated average daily spend for each type of audiovisual production.

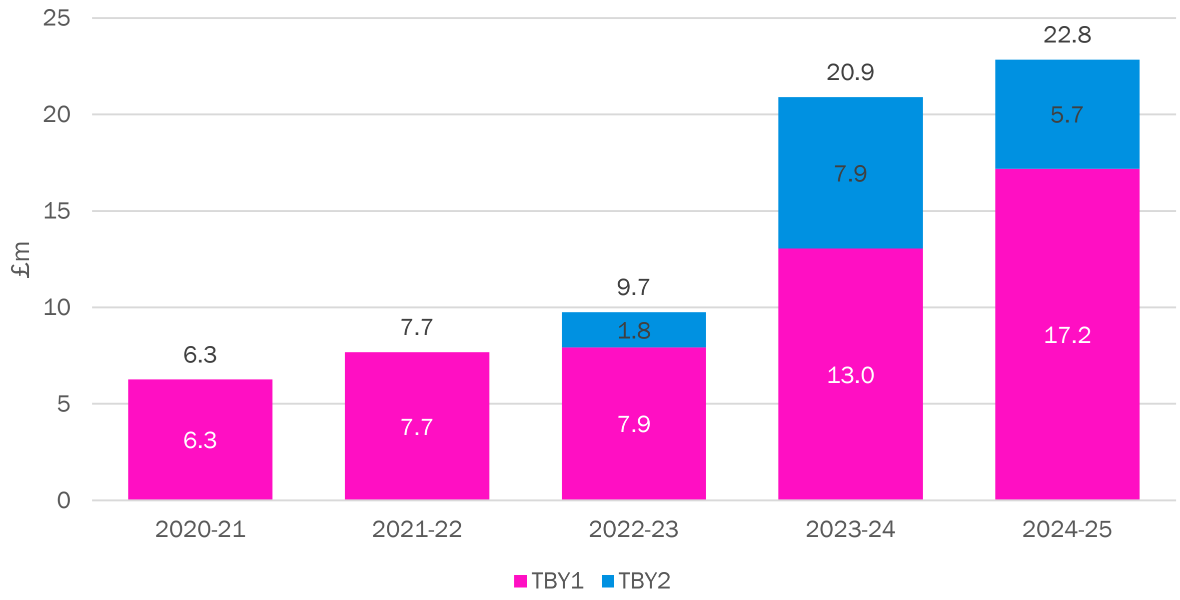
Table 35: Number of TBYS projects by type

Rate card group	Type	Estimated daily local spend (£)	2020-21	2021-22	2022-23	2023-24	2024-25
B	Feature film: Medium (£10m+)	£90,000	0	0	1	0	0
C	Feature film: Low (£1.5m+)	£13,000	0	0	0	3	1
D	HETV: (3.5m per ep)	£80,000	0	0	0	5	5
E	HETV Medium (£2m+ per ep)	£61,000	0	1	2	8	6
F	HETV: Low (£1.25m+ per ep)	£46,000	0	0	0	3	4
G	TV Drama/Soap (<£1.25m per ep)	£20,000	6	6	6	1	0
H	TV Sitcom/Comedy Drama	£12,000	0	2	2	0	2
I	TV Light entertainment / High End Doc / Reality	£4,000	0	3	0	0	5
J	TV News	£500	0	3	1	2	0
K	Commercial >£1m	£25,000	2	1	4	2	0
L	Commercial <£1m	£15,000	0	2	1	1	1
M	Music video	£2,500	0	0	2	1	1
N	Corporate	£1,250	1	0	4	3	0
O	Micro-budget film	£1,000	1	1	0	1	5
P*	Other	£1,250	0	1	0	0	0
T*	Other	£1,250	0	0	2	0	0
Total		--	10	20	25	30	30

Film and TV production expenditures

TBYS and BFO also provided the number of filming days for each project (broken down by prep, principal photography and strike days). In accordance with the Filming in England Rate Card guidance, the daily spend rates for prep and strike days were set at 50% of the standard daily spend rate for principal photography. Filming days were multiplied by the rate card to derive estimates of the annual levels of local production spending at TBY1 and TBY2.

Figure 26: Film and TV production spending at TBY1 and TBY2



Source: Nordicity estimates based on data from TBYS, BFO and Filming in England

Employment

To estimate the gross number of direct, indirect and induced FTEs generated by this local production spending, Nordicity adopted the employment multipliers implied by the analysis found in report, *The Bottle Yard Studios – Impact of Screen Expenditure on Bristol*, prepared by Olsberg-SPI for BBC in August 2020.

Table 36 Employment multipliers derived by Olsberg-SPI

	2015-16	2016-17	2017-18	2018-19	2019-20
TBYS					
Production spending (£)	–	13,776,750	11,573,500	12,800,000	12,948,000
FTEs					
Direct		99.2	82.4	90	90
Indirect		64.8	53.8	58.8	58.7
Induced		40.9	33.9	37.1	37.1
FTEs per £1m					
Direct		7.2	7.1	7.0	7.0
Indirect		3.5	3.5	3.7	3.4
Induced		2.2	2.2	2.3	2.2
Total		12.9	12.9	13.0	12.6

Source: Olsberg-SPI, The Bottle Yard Studios – Impact of Screen Expenditure on Bristol, August 2020

Nordicity applied a deflator index based on annual changes in the consumer price index (CPI) to extend the FTE multipliers from 2019-20 to 2024-25.

Table 37: FTE multipliers (FTEs per £1 million production spending)

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Direct	7.0	6.8	6.3	5.9	5.7	5.6
Indirect	3.4	3.4	3.1	2.9	2.8	2.8
Induced	2.2	2.1	2.0	1.8	1.8	1.8
Total	12.6	12.3	11.4	10.6	10.3	10.1
CPI index	108.9	111.6	120.5	128.6	132.9	138.2

Source: Nordicity estimates based on data from Olsberg-SPI and ONS

These FTE multipliers were multiplied by the estimated annual levels of production spending at TBY1 and TBY2 to estimate gross FTEs for direct, indirect and induced impacts.

Table 38: Estimated number of net FTEs generated by film and TV production at TBY1 and TBY2

	2020-21	2021-22	2022-23	2023-24	2024-25
TBY1					
Direct	42.5	48.2	46.6	74.3	96.4
Indirect	21.0	23.9	23.1	36.8	47.7
Induced	13.3	15.1	14.6	23.3	30.2
Total	76.8	87.1	84.3	134.3	174.3
TBY2					
Direct	--	--	10.7	44.7	31.8
Indirect	--	--	5.3	22.1	15.7
Induced	--	--	3.4	14.0	10.0
Total	0.0	0.0	19.4	80.8	57.5
TBY1 + TBY2					
Direct	42.5	48.2	57.4	119.0	128.2
Indirect	21.0	23.9	28.4	58.9	63.5
Induced	13.3	15.1	18.0	37.2	40.1
Total	76.8	87.1	103.8	215.2	231.8

Source: Nordicity estimates based on data from TBYS, BFO, Filming in England, Olsberg-SPI and ONS

The 75% additionality rate was applied to arrive at estimates of the net direct, indirect (i.e. supply chain) and induced impact employment generated by each studio facility and overall.

Gross value added

To estimate the GVA generated by film and TV production at TBYS, Nordicity drew upon previous (unpublished) of the economic impact of TBYS and the Bristol film and TV production cluster prepared for the British Film Commission (BFC). That research used multipliers for average spending per square foot of stage space and an input-output model of the UK economy (adapted to provide region- and local-level estimates).

The research and economic modelling for the BFC found that for every £1 million of film and TV production spending in Bristol, £890,000 of gross GVA is generated for the local economy, including

- £510,000 in direct GVA,
- £280,000 in indirect GVA and
- £90,000 in induced GVA.

These GVA multipliers were multiplied by the estimated annual levels of production spending at TBY1 and TBY2 – along with the 75% additionality rate – to arrive at estimates of the net direct, indirect (i.e. supply chain) and induced impact GVA generated by each studio facility and overall.

Table 39: Estimated net GVA generated by film and TV production at TBY1 and TBY2 (£m)

	2020-21	2021-22	2022-23	2023-24	2024-25
TBY1					
Direct	2.4	3.0	3.0	5.0	6.6
Indirect	1.3	1.6	1.7	2.8	3.6
Induced	0.4	0.5	0.6	0.9	1.2
Total	**4.2**	**5.1**	**5.3**	**8.7**	**11.5**
TBY2					
Direct	--	--	0.7	3.0	2.2
Indirect	--	--	0.4	1.7	1.2
Induced	--	--	0.1	0.6	0.4
Total	**0.0**	**0.0**	**1.2**	**5.2**	**3.8**
TBY1 + TBY2					
Direct	2.4	3.0	3.8	8.0	8.8
Indirect	1.3	1.6	2.1	4.4	4.8
Induced	0.4	0.5	0.7	1.5	1.6
Total	**4.2**	**5.1**	**6.5**	**14.0**	**15.3**

Source: Nordicity estimates based on data from TBYS, BFO, Filming in England, Nordicity-BFC and ONS

Table 40: Estimated number of net FTEs generated by film and TV production at TBY1 and TBY2

	2020-21	2021-22	2022-23	2023-24	2024-25
TBY1					
Direct	31.9	36.2	35.0	55.7	72.3
Indirect	15.8	17.9	17.3	27.6	35.8
Induced	10.0	11.3	10.9	17.4	22.6
Total	57.6	65.4	63.2	100.8	130.7
TBY2					
Direct	--	--	8.1	33.5	23.9
Indirect	--	--	4.0	16.6	11.8
Induced	--	--	2.5	10.5	7.5
Total	0.0	0.0	14.6	60.6	43.1
TBY1 + TBY2					
Direct	31.9	36.2	43.0	89.3	96.1
Indirect	15.8	17.9	21.3	44.2	47.6
Induced	10.0	11.3	13.5	27.9	30.1
Total	57.6	65.4	77.8	161.4	173.8

Source: Nordicity estimates based on data from TBYS, BFO, Filming in England, Olsberg-SPI and ONS

Appendix D: Online survey questionnaires

Crew and Cast Survey

Evaluation of the Economic Impact and Benefits of The Bottle Yard Studios - Local Crew and Cast Survey

1. Introduction

Welcome to the Local Crew Survey!
Evaluation of the Economic Impact and Benefits of The Bottle Yard Studios Main Site and Expansion

Dear Local Crew Members,

Thank you for taking part in this important survey!
We are working with the West of England Combined Authority and Bristol City Council to assess the economic impact and benefits of The Bottle Yard Studios, including the West of England Film/High-End TV Workforce Development Programme.

This evaluation will help the Council and Combined Authority understand the effects of their £13.5m investment in:
- Renewal and repair works at The Bottle Yard Studios main site (TBY1)
- The development of TBY2, The Bottle Yard Studios' expansion facility
- The ongoing West of England Film/High-End TV Workforce Development Programme, delivered at the Studios

To do this, Bristol City Council has partnered with Nordicity and Saffery LLP to gather valuable insights from crew members like you, who have recently worked at The Bottle Yard Studios main site or TBY2, its expansion facility.

Why Your Input Matters

Your feedback is essential for understanding the need to continue supporting the growth of the region's film and TV production industry. Your voice will help shape future investments and policies.

How Long Will It Take?

We understand you're busy, so we've designed this survey to be as quick and easy as possible. It should only take about 15 minutes of your time. As a token of our appreciation, the first 100 respondents who provide their email address will receive a £3 voucher to spend at The Bottle Yard Studios on-site café.

All questions marked with an asterisk (*) are mandatory.

Contact

If you have any questions, contact:
Louis Underwood at Nordicity (lunderwood@nordicity.com) or
Katherine Nash at The Bottle Yard Studios (katherine.nash@bristol.gov.uk).

1. We value your privacy

All responses are confidential and adhere to GDPR and the Data Protection Act (DPA 2018).

☐ I want more information about data protection and privacy

Data Privacy:

Nordicity and Saffery LLP are committed to protecting the privacy of all survey respondents' personal data and meeting its obligations under the General Data Protection Regulation ("GDPR") and the Data Protection Act 2018.

This online survey questionnaire asks you to share your email address.

We will use this email address to contact you about the delivery of any incentive provided to survey respondents. We may also use this email address to clarify your answers to certain questions.

In the process of completing the questionnaire, the SmartSurvey online survey platform will also record your IP address.

If you elect to save your partially completed survey questionnaire to resume at a future time, then the SmartSurvey platform will request and separately store the email address that you provide.
Any personal data collected by the SmartSurvey platform will be securely stored and not shared with any third parties other than Nordicity and Saffery LLP. Any personal data collected by the SmartSurvey platform will be permanently deleted 12 months after you submit your completed survey questionnaire.

Further information on SmartSurvey's data privacy policies and practices can be found here.
Nordicity's Privacy Policy can be found here.
A copy of Saffery LLP's Privacy Policy can be found here.
A copy of Bristol City Council's Privacy Notice can be found here.
A copy of The Bottle Yard Studio's Privacy Notice can be found here.

2. Do you agree to allow Smart Surveys, Saffery LLP and Nordicity to securely store your personal data for 12 months from the date that you submit your completed survey questionnaire?

- [ ] YES, I agree. Let's begin the survey!
- [ ] NO, I would not like to share my IP address and email address, and do not wish to proceed with the survey.

Bristol City Council and The Bottle Yard Studios are committed to increasing employment and economic opportunities in South Bristol. For that reason, we would like to collect some information on where you live.

3. Where do you live?

*Bedminster, Southville, Windmill Hill, Knowle, Filwood, Bishopsworth, Hartcliffe & Withywood, Hengrove & Whitchurch Park, Stockwood, and Brislington.
**South Gloucestershire or Bath and North East Somerset

- [ ] in South Bristol*
- [ ] elsewhere in Bristol
- [ ] the West of England region**
- [ ] the rest of the UK
- [ ] Outside the UK

4. In addition, could you please provide the first 3/4 characters of your home postcode wherever you live (e.g. BS1 or BS10).

5. In which year did you start your career in the film and TV production industry?

6. Have you worked as a crew member on a film, TV programme or other audiovisual production being filmed or based at The Bottle Yard Studios during any of the following years? (Select all that apply)

- [ ] in 2021 or earlier
- [ ] in 2022
- [ ] in 2023
- [ ] in 2024
- [ ] Not applicable

7. What film department do you currently work in primarily? (select one)

- [ ] Accounts
- [ ] Art
- [ ] Assistant directors / continuity
- [ ] Camera & Grip
- [ ] Lighting
- [ ] Locations
- [ ] Make up & hair
- [ ] Production
- [ ] Sound
- [ ] Wardrobe
- [ ] 2nd unit
- [ ] Other (please specify):

8. Was your first paid job in the film and TV production industry on a project filmed or based at The Bottle Yard Studios?

- [ ] Yes
- [ ] No
- [ ] Prefer not to say

9. Are you currently or have you previously worked on a paid or unpaid training/internship on a film or TV project that filmed or based at The Bottle Yard Studios?

- [ ] Yes
- [ ] No
- [ ] Prefer not to say

10. Over the past 3 years, how many productions did you work on at:

The Bottle Yard Studios main site (TBY1 on Whitchurch Lane)

The Bottle Yard Studios' expansion site (TBY2 on Hawkfield Way)

11. What genre did the production/s you worked on at The Bottle Yard Studios in the last 3 years fall under? (select all that apply)

- Children's
- High-End TV
- Feature film
- TV Entertainment
- TV factual
- Documentary
- Employed by a permanent tenant on site
- Other (please specify):

12. How many High-End TV projects did you work on in in the last 3 years:
Please only answer if you selected 'High-End TV' in the previous question

Band 1 TV Drama (below £850k per hour)

Band 2 TV Drama (£850k - £3m per hour)

Band 3 TV Drama (£3m per hour)

Band 4 TV Drama (£7m per hour)

13. How many feature film projects did you work on in in the last 3 years:
Please only answer if you selected 'Feature film' in the previous question

Feature Films (£1m - £4m)

Feature Films (£4m - £10m)

14. Approximately how many weeks of paid work in film and TV production have you had in each of the time periods indicated below?

Please select the range that best represents the number of weeks you worked in paid film or TV production, whether at The Bottle Yard Studios, other studios or on location.

	0 weeks	1-4 weeks	5-10 weeks	11-26 weeks	27-39 weeks	40+ weeks
2022	☐	☐	☐	☐	☐	☐
2023	☐	☐	☐	☐	☐	☐
2024 (Jan-Aug)	☐	☐	☐	☐	☐	☐

15. If The Bottle Yard Studios did not exist, how do you think your total weeks of paid work in film and TV production in the Bristol area would have differed over the same period (January 2022–August 2024)?

Please select an estimated range based on how many more or less days you think you would have workedhad The Bottle Yard Studios not existed.

☐ Far fewer weeks (approximately 50% fewer; e.g., if you worked 20 weeks, it would be around 10 weeks)

☐ Slightly fewer weeks (approximately 25% fewer; e.g., if you worked 20 weeks, it would be around 15 weeks)

☐ About the same (no major change in days worked)

☐ Slightly more weeks (approximately 25% more; e.g., if you worked 20 weeks, it would be around 25 weeks)

☐ Far more weeks (approximately 50% more; e.g., if you worked 20 weeks, it would be around 30 weeks)

16. If The Bottle Yard Studios' expansion site (TBY2) had not opened, how do you think your total weeks of paid work in film and TV production in the Bristol area would have differed over the same period (January 2022–August 2024)?

☐ Far fewer weeks (approximately 50% fewer; e.g., if you worked 20 weeks, it would be around 10 weeks)

☐ Slightly fewer weeks (approximately 25% fewer; e.g., if you worked 20 weeks, it would be around 15 weeks)

☐ About the same (no major change in days worked)

☐ Slightly more weeks (approximately 25% more; e.g., if you worked 20 weeks, it would be around 25 weeks)

☐ Far more weeks (approximately 50% more; e.g., if you worked 20 weeks, it would be around 30 weeks)

17. Please indicate the degree to which you agree or disagree with the following statements about your experience working as a crew member on projects filmed or based at The Bottle Yard Studios.

Working on film or TV productions at The Bottle Yard Studios has...

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
Given me access to high-quality facilities that improved my experience of the work environment	☐	☐	☐	☐	☐	☐
Increased my opportunities to earn more	☐	☐	☐	☐	☐	☐
Increased the certainty, predictability and stability of my employment and income in film and TV production	☐	☐	☐	☐	☐	☐
Increased my access to creative and/or technical skills development opportunities	☐	☐	☐	☐	☐	☐
Accelerated my career progression in film and TV production	☐	☐	☐	☐	☐	☐
Increased my understanding of future career progression or alternative pathways	☐	☐	☐	☐	☐	☐
Increased my collaborative skills	☐	☐	☐	☐	☐	☐
Increased my opportunities for skills development	☐	☐	☐	☐	☐	☐

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
through other means facilitated or provided by The Bottle Yard Studios						
Increased my opportunities for networking within the film and TV production industry	☐	☐	☐	☐	☐	☐
Given me a greater sense of belonging within a professional creative community	☐	☐	☐	☐	☐	☐
Given me a sense of pride to be working at a leading UK production facility	☐	☐	☐	☐	☐	☐
Increased my general working confidence	☐	☐	☐	☐	☐	☐
Increased my confidence in taking on new responsibilities or skills	☐	☐	☐	☐	☐	☐
Increased my confidence to pursue creative opportunities in film and TV (e.g. writing, directing, producing)	☐	☐	☐	☐	☐	☐
Improved my quality of life and/or wellbeing	☐	☐	☐	☐	☐	☐
Given me the opportunity to work with a diverse workforce	☐	☐	☐	☐	☐	☐

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
Left me feeling more positive about my future work and career	☐	☐	☐	☐	☐	☐

18. Do you ever top up your income by working in employment outside of film & TV?

- ☐ Yes
- ☐ No
- ☐ Don't know / prefer not to say

19. Of the following, which are the most important benefits you've experienced from working at The Bottle Yard Studios?

Please rank in order of importance, where 1 = 'most important' and 8 = 'least important', you can only assign each benefit to one rank.

	1	2	3	4	5	6	7	8
Job opportunities and improved income stability	☐	☐	☐	☐	☐	☐	☐	☐
Skills development and career progression	☐	☐	☐	☐	☐	☐	☐	☐
Networking opportunities	☐	☐	☐	☐	☐	☐	☐	☐
Confidence to pursue creative opportunities	☐	☐	☐	☐	☐	☐	☐	☐
Sense of belonging within a creative community	☐	☐	☐	☐	☐	☐	☐	☐
Access to high-quality facilities	☐	☐	☐	☐	☐	☐	☐	☐
Working closer to home	☐	☐	☐	☐	☐	☐	☐	☐
Working in accessible roles	☐	☐	☐	☐	☐	☐	☐	☐

20. With regards to **The Bottle Yard Studios' expansion site (TBY2)** specifically, how does it compare to other sound stage facilities in the UK?

	Very much better than most	Better than most	Comparable to most	Worse than most	Very much worse than most	Don't know / Not applicable
Soundstages (acoustics)	☐	☐	☐	☐	☐	☐
Soundstages (power)	☐	☐	☐	☐	☐	☐
Soundstages (loading capacity)	☐	☐	☐	☐	☐	☐
Workshops/ancillary spaces	☐	☐	☐	☐	☐	☐
Production office space	☐	☐	☐	☐	☐	☐
Parking facilities	☐	☐	☐	☐	☐	☐
On-site accessibility	☐	☐	☐	☐	☐	☐
Catering	☐	☐	☐	☐	☐	☐
Sustainability	☐	☐	☐	☐	☐	☐
IT support / connectivity	☐	☐	☐	☐	☐	☐
Security	☐	☐	☐	☐	☐	☐
Facility overall	☐	☐	☐	☐	☐	☐

If you have specific feedbacks about any of the above; either commending certain features or suggesting how they might be improved, please provide comments below.

21. Please indicate the degree to which you agree or disagree with the following statements about your experience or perception of **TBY2, The Bottle Yard Studios' expansion facility.**

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know / Not applicable
Working at TBY2 has been a positive experience	☐	☐	☐	☐	☐	☐

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know / Not applicable
Engaging with TBY2 staff has been a positive experience	☐	☐	☐	☐	☐	☐
I am proud of TBY2's contribution to the local filming infrastructure	☐	☐	☐	☐	☐	☐
I believe TBY2 has elevated Bristol and the West of England's profile within the UK film and TV sector	☐	☐	☐	☐	☐	☐

If you have specific comments about any of the above, please could you provide them below.

22. Have you received training or education directly relevant to your screen sector career from (or delivered at) any of the following:

(select all that apply):

- ☐ University of West England
- ☐ Knowle West Media Centre
- ☐ City of Bristol College
- ☐ Boomsatsuma
- ☐ ScreenSkills
- ☐ University of Bristol
- ☐ University of Bath
- ☐ Bath College
- ☐ Gloucestershire College

- [ ] South Gloucestershire & Stroud College
- [ ] Weston College of Further & Higher Education
- [ ] None
- [ ] Other (please specify):

Please briefly describe the education and training you received (e.g. types of courses).

23. In January 2024, the West of England Film/High End TV Workforce Development Programme was launched at The Bottle Yard Studios, delivering free training to support local people from backgrounds currently underrepresented in the industry become 'set ready' for entry level production roles. How important do you think it is that this type of scheme at The Bottle Yard Studios should continue?

	Very important	Important	Neither important nor unimportant	Not very important	Not at all important	Don't know/Not applicable
Select one:	☐	☐	☐	☐	☐	☐

Please add comments to explain your answer.

24. Since January 2022, have you provided on set support to the West of England Film/High End TV Workforce Development Programme trainees, or any other trainees / work experience placements, whilst you have been working on productions filmed or based at The Bottle Yard Studios?

Select all that apply:

- [ ] Mentoring
- [ ] Shadowing
- [ ] Q&A's

- [ ] Work experience placement supports
- [ ] Workshop sessions
- [ ] None
- [ ] Don't know/Prefer not to say
- [ ] Other (please describe)

25. Please tell us how rewarding you found it to be able to share your knowledge and experience with those at an earlier stage in their careers?

- [ ] Very rewarding
- [ ] Quite rewarding
- [ ] Neither rewarding or unrewarding
- [ ] Don't know / Prefer not to say

Please give comments to support your answer:

26. How has working as a crew member at The Bottle Yard Studios impacted your career?

27. How would you rate the quality of the production facilities at The Bottle Yard Studios main site (TBYS1)?
On a scale of 1 to 5, where 1 is "Poor" and 5 is "Excellent".

- [ ] 1 - Poor
- [ ] 2 - Fair
- [ ] 3 - Good
- [ ] 4 - Very Good
- [ ] 5 - Excellent
- [ ] Don't know / Prefer not to say

28. Please provide any specific feedback or suggestions for improvement to:
a) Enhance the facilities at The Bottle Yard Studios main site (TBYS1) to better meet the needs of film and TV productions.
b) Boost the reputation of Bristol as a leading location for film and television production.

29. If you have any additional comments or recommendations, please share them below. (Optional)

30. How would you rate the quality of the production facilities at The Bottle Yard Studios expansion facility (TBY2)?

On a scale of 1 to 5, where 1 is "Poor" and 5 is "Excellent".

- ☐ 1 – Poor
- ☐ 2 – Fair
- ☐ 3 – Good
- ☐ 4 - Very Good
- ☐ 5 - Excellent
- ☐ Don't know / Prefer not to say

31. Please provide any specific feedback or suggestions for improvement to:
a) Enhance the facilities at The Bottle Yard Studios expansion site (TBY2) to better meet the needs of film and TV productions.
b) Boost the reputation of Bristol as a leading location for film and television production.

32. If you have any additional comments or recommendations, please share them below. (Optional)

33. What is your age?

- [ ] 0-10
- [ ] 11-15
- [ ] 16-17
- [ ] 18-24
- [ ] 25-34
- [ ] 35-44
- [ ] 45-54
- [ ] 55-64
- [ ] 65-74
- [ ] 75-84
- [ ] 85+
- [ ] Prefer not to say

34. Do you consider yourself to be a disabled person?
(Bristol City Council uses the 'Social Model of Disability' which recognises that people are disabled by barriers in society such as lack of physical access and lack of accessible communication, not by their impairment)

- [ ] Yes
- [ ] No
- [ ] Prefer not to say

35. What gender do you identify as?

- [ ] Female
- [ ] Male
- [ ] Non-binary
- [ ] Prefer not say

36. What is your sexual orientation?

- [ ] Bisexual
- [ ] Gay Man
- [ ] Gay Woman/Lesbian
- [ ] Heterosexual/Straight
- [ ] Prefer not to say

☐ Other (please specify):

37. What is your ethnic group? (please tick one box only)

☐ Asian / Asian British

☐ Black /African / Caribbean / Black British

☐ Mixed / Multi ethnic group

☐ White

☐ Prefer not to say

☐ Any other ethnic background (please describe)

38. Which one of the following best describes your primary employment status during the...

	Last 7 days	Past 12 months
Working as an employee	☐	☐
Working as self-employed or freelancer	☐	☐
Temporarily away from work ill or on holiday	☐	☐
Not working but looking for work	☐	☐
Not working and not looking for work	☐	☐
Student	☐	☐
Apprenticeship scheme/training	☐	☐
Retired	☐	☐
Other	☐	☐
Prefer not to say	☐	☐

39. What was the occupation of the primary earner in your household when you were 14?

- [ ] Long-term unemployed (claimed benefit for more than a year)
- [ ] Routine, semi-routine manual and service occupations (e.g., postal worker, machine operative, farm worker, catering assistant, sales assistant, HGV driver, cleaner, labourer, waiter)
- [ ] Technical and craft occupations (e.g., motor mechanic, plumber, printer, electrician, gardener, train driver)
- [ ] Clerical and intermediate occupations (e.g., secretary, personal assistant, call centre agent, clerical worker, nursery nurse)
- [ ] Senior, middle or junior managers or administrators (e.g., finance manager, chief executive, large business owner, office manager, retail manager, bank manager, restaurant manager, warehouse manager
- [ ] Modern and traditional professional occupations (e.g., teacher, nurse, social worker, musician, police officer (sergeant or above), software designer, accountant, solicitor, medical practitioner, scientist, engineer)
- [ ] Small business owners who employed fewer than 20 people
- [ ] Other such as retired, this question does not apply to me, I don’t know
- [ ] Prefer not to say

40. If you finished school after 1980, were you eligible for free school meals at any point during your school years?

- [ ] Yes
- [ ] No
- [ ] Not applicable (finished school before 1980 or went to school overseas)
- [ ] I don’t know
- [ ] Prefer not to say

41. What is your highest levels of education/training?

- [ ] No formal qualifications
- [ ] NVQ1 (Equivalent to 3-4 GCSEs [grades D-G])
- [ ] NVQ2 (Equivalent to 4-5 GCSEs [grades A*-C])
- [ ] NVQ3 (Equivalent to 2 A Levels)
- [ ] NVQ4+ (Higher education [e.g., BTEC, Foundation Degree, Undergraduate Degree, Master's Degree, PGCE])
- [ ] I don’t know / prefer not to say

42. Do you have any caring responsibilities for a child/children and/or another adult(s)? Select all that apply. If you share care responsibilities equally then please answer as the primary carer.

- ☐ Yes, primary carer of a child /children (under 18 years)
- ☐ Yes, primary carer of a child/children (under 18 years) who is disabled or has a health condition or illness, or temporary care needs.
- ☐ Yes, primary carer or assistant for an adult (over 18 years) because they have long-term physical or mental health conditions or illnesses, or problems related to old age.
- ☐ Yes, secondary carer (another person carries out the main caring role).
- ☐ No
- ☐ Prefer not to say

43. (Optional) Would you like to share how your socioeconomic background has influenced your career path?

44. Do you have any other comments about this survey or project?

45. Would you like to stay involved in further discussions about the impact and future of The Bottle Yard Studios 1 and 2?

- ☐ Yes
- ☐ No

46. How would you like to further engage with this initiative? (Select all that apply)

- [ ] Join future stakeholder meetings and interviews
- [ ] Conduct further surveys
- [ ] Sign up to the TBYS and TBYS2 newsletter
- [ ] Would like information about skills development/career progression
- [ ] Other ideas, please specify:

47. Please provide your email address so we may contact you about the survey incentive and to possibly clarify any of your answers to the survey questions.

Production Companies Survey

Evaluation of the Economic Impact and Benefits of The Bottle Yard Studios - Production Companies Survey

1. Introduction

Welcome to the Bottle Yard Studios Production Company Survey!

Thank you for taking part in this important survey!

We are working with Bristol City Council and the West of England Combined Authority to assess the economic impact and benefits of The Bottle Yard Studios (TBY), including the West of England Film/High-End TV Workforce Development Programme.

This evaluation will help the the Council and Combined Authority understand the effects of their £13.8m investment in:

Renewal and repair works at The Bottle Yard Studios' main site (TBY1)

The development of The Bottle Yard Studios' expansion facility (TBY2)

The ongoing West of England Film/High-End TV Workforce Development Programme delivered at the Studios

To do this, Bristol City Council has partnered with Nordicity and Saffery LLP to gather insights from production companies who have recently worked at TBY1 or TBY2.

Why Your Input Matters

As a production company that has filmed at TBY, your feedback is essential for TBY to understand how they can continue to support the growth of the region's film and TV production industry. Your voice will help shape future investments and policies.

How Long Will It Take?

We understand you're busy, so we've designed this survey to be as quick and easy as possible. It should only take about 15 minutes of your time.

All questions marked with an asterisk (*) are mandatory.

Contact

If you have any questions, contact:

Louis Underwood at Nordicity (lunderwood@nordicity.com) or

Katherine Nash at The Bottle Yard Studios (katherine.nash@bristol.gov.uk).

1. We value your privacy

All responses are confidential and adhere to GDPR and the Data Protection Act (DPA 2018).

☐ I want more information about data protection and privacy

Data Privacy:
Nordicity and Saffery LLP are committed to protecting the privacy of all survey respondents' personal data and meeting its obligations under the General Data Protection Regulation ("GDPR") and the Data Protection Act 2018.
This online survey questionnaire asks you to share your email address.
We will use this email address to contact you about the delivery of any incentive provided to survey respondents.
We may also use this email address to clarify your answers to certain questions.
In the process of completing the questionnaire, the SmartSurvey online survey platform will also record your IP address.
If you elect to save your partially completed survey questionnaire to resume at a future time, then the SmartSurvey platform will request and separately store the email address that you provide.
Any personal data collected by the SmartSurvey platform will be securely stored and not shared with any third parties other than Nordicity and Saffery LLP. Any personal data collected by the SmartSurvey platform will be permanently deleted 12 months after you submit your completed survey questionnaire.
Further information on SmartSurvey's data privacy policies and practices can be found here.
Nordicity's Privacy Policy can be found here.
A copy of Saffery LLP's Privacy Policy can be found here.
A copy of Bristol City Council's Privacy Notice can be found here.
A copy of The Bottle Yard Studio's Privacy Notice can be found here.

2. Do you agree to allow Smart Surveys, Saffery LLP and Nordicity to securely store your personal data for 12 months from the date that you submit your completed survey questionnaire?

☐ YES, I agree. Let's begin the survey!

☐ NO, I would not like to share my IP address and email address, and do not wish to proceed with the survey.

3. Where is the main location of your business?

*Bedminster, Southville, Windmill Hill, Knowle, Filwood, Bishopsworth, Hartcliffe & Withywood, Hengrove & Whitchurch Park, Stockwood, and Brislington.
**South Gloucestershire or Bath and North East Somerset.

☐ South Bristol*

☐ Elsewhere in Bristol

☐ In the West of England region outside Bristol**

☐ Elsewehere in the UK

☐ Outside the UK

4. In addition, could you please provide the first 2-4 characters of your businesses main location postcode (e.g. BS1 or BS10).

If you are based outside the UK, enter "NA".

5. What is the name of your business?

6. In which year did your business start operating in the film and TV production industry?

7. Please briefly describe the types of films and TV programmes that your company produces and has specifically filmed at TBY?

8. What genre of production did your projects at TBY fall within? (Select all that apply)

- [ ] Children's
- [ ] High end TV
- [ ] Feature film
- [ ] TV Entertainment
- [ ] TV factual
- [ ] Documentary
- [ ] Employed by a permanent tenant on site
- [ ] Other (please specify):

9. How many High-End TV projects at TBY did your company work on during 2022-2024:
Please only answer if you selected 'High-End TV' in the previous question

Band 1 TV Drama (below £850k per hour)	
Band 2 TV Drama (£850k - £3m per hour)	
Band 3 TV Drama (£3m per hour)	
Band 4 TV Drama (£7m per hour)	

10. How many feature film projects did your company work on at TBY during 2022-2024:
Please only answer if you selected 'Feature film' in the previous question

Feature Films (£1m - £4m)	
Feature Films (£4m - £10m)	

11. How many weeks did your company film at TBY in each of the following years?

This should include any preparation and strike time.

	TBY1	TBY2
2022		
2023		
2024		

12. During filming at TBY1 and TBY2, how many people did you employ in each of the following years?

This should include any preparation and strike time.

	Above the line	Below the line performers and extras	Below the line crew
2022			
2023			
2024			

13. What was the approximate value of your film and TV production spending at TBY1 or TBY2 in each of the following years?

2022 (£)

2023 (£)

2024 (£)

14. What was total approximate value of your film and TV production spending on these projects within the wider West of England region (Bristol, Bath and North East Somerset, and South Gloucester)?

Include production spending at TBY and any location filming outside of TBY.

2022 (£)

2023 (£)

2024 (£)

15. On account of the Hollywood strikes, how much lower was your film and TV production spending in 2023 compared to what you forecast for 2023?
(%)

16. On account of the Hollywood strikes, what percentage of your number of commissions were cut?
(%)

17. Which of the following has your company hired facilities at:
(Select all that apply)

- ☐ TBY1 only
- ☐ TBY2 only
- ☐ TBY1 and TBY2
- ☐ Neither / Don't know / Prefer not to say

18. How would you rate the quality of the following production facilities at TBY1?

On a scale of 1 to 5, where 1 is "Poor" and 5 is "Excellent".

	1 - Poor	2 - Fair	3 - Good	4 - Very Good	5 - Excellent	Don't know/not applicable
Production offices	☐	☐	☐	☐	☐	☐
Stages	☐	☐	☐	☐	☐	☐
Costume facilities	☐	☐	☐	☐	☐	☐
Prop stores	☐	☐	☐	☐	☐	☐
Parking	☐	☐	☐	☐	☐	☐
Overall production facilities	☐	☐	☐	☐	☐	☐

19. How would you rate the quality of the following production facilities at TBY2?

On a scale of 1 to 5, where 1 is "Poor" and 5 is "Excellent".

	1 - Poor	2 - Fair	3 - Good	4 - Very Good	5 - Excellent	Don't know/not applicable
Production offices	☐	☐	☐	☐	☐	☐
Stages	☐	☐	☐	☐	☐	☐
Costume facilities	☐	☐	☐	☐	☐	☐
Prop stores	☐	☐	☐	☐	☐	☐
Parking	☐	☐	☐	☐	☐	☐
Overall production facilities	☐	☐	☐	☐	☐	☐

20. Please indicate the extent to which you agree or disagree with the following statements about your production company's experience filming at TBY.

Working on projects at TBY has...

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
Provided high-quality facilities that improved my company's ability to create high quality film or TV content	☐	☐	☐	☐	☐	☐
Improved my company's access to production services suppliers	☐	☐	☐	☐	☐	☐
Improved my company's access to skilled crews	☐	☐	☐	☐	☐	☐
Improved my company's access to trainees and new talent	☐	☐	☐	☐	☐	☐
Improved my company's access to a diverse workforce	☐	☐	☐	☐	☐	☐
Improved my company's ability to reduce its carbon footprint	☐	☐	☐	☐	☐	☐
Improved my company's ability to meet other environmental sustainability objectives	☐	☐	☐	☐	☐	☐
Improved my company's ability to keep projects on budget	☐	☐	☐	☐	☐	☐

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
Allowed my company to lower the cost of production on film and TV projects (compared to filming in London or the South East of England for example)	☐	☐	☐	☐	☐	☐
Provided my projects with a base for accessing attractive filming locations	☐	☐	☐	☐	☐	☐

21. Specifically in regard to TBY2 how does it compare to other soundstage facilities in the UK.

	Very much better than most	Better than most	Comparable to most	Worse than most	Very much worse than most	Don't know/Not applicable
The soundstages	☐	☐	☐	☐	☐	☐
The workshops	☐	☐	☐	☐	☐	☐
Production office space	☐	☐	☐	☐	☐	☐
Parking facilities	☐	☐	☐	☐	☐	☐
On-site accessibility	☐	☐	☐	☐	☐	☐
Catering	☐	☐	☐	☐	☐	☐
Sustainability	☐	☐	☐	☐	☐	☐

If you have specific comments about any of the above or how they might be improved, please could you provide them below.

22. Please indicate the extent to which you agree or disagree with the following statements about your experience or perception of TBY2.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
Locating our production at TBY2 has been a positive experience	☐	☐	☐	☐	☐	☐
Engaging with TBY2 staff has been a positive experience	☐	☐	☐	☐	☐	☐
I believe that TBY2 plays an important role in the local filming infrastructure	☐	☐	☐	☐	☐	☐
I believe that TBY2 plays an important role in the national filming infrastructure	☐	☐	☐	☐	☐	☐
If TBY2 did not exist in Bristol, I would not be able to bring my production to the region	☐	☐	☐	☐	☐	☐

If you have specific comments about any of the above, please could you provide them below.

23. Please provide any specific feedback or suggestions for improvement to:

a) Enhance the facilities at TBY to better meet the needs of film and TV productions.

b) Boost the reputation of Bristol as a leading location for film and television production.

24. If you have any additional comments or recommendations, please share them below. (optional)

25. Would you like to stay involved in future discussions about the impact of TBY1 and TBY2 via any of the following?
(Select all that apply)

- [ ] Join further stakeholder meetings and interviews
- [ ] Conduct further surveys
- [ ] Sign up to the TBY1 and TBY2 newsletter
- [ ] No thank you, I would not like to stay involved
- [ ] Other ideas (please specify):

26. Please provide your email address so we may contact you about the survey incentive and to possibly clarify any of your answers to the survey questions.

Tenant Supplier Survey

Evaluation of the Economic Impact and Benefits of The Bottle Yard Studios - Tenant-Supplier Survey

1. Introduction

Welcome to the Bottle Yard Studios Tenant and Supplier Survey!

Thank you for taking part in this important survey!

We are working with Bristol City Council and the West of England Combined Authority to assess the economic impact and benefits of The Bottle Yard Studios (TBY), including the West of England Film/High-End TV Workforce Development Programme.

This evaluation will help the Council and Combined Authority understand the effects of their £13.8m investment in:

Renewal and repair works at The Bottle Yard Studios' main site (TBY1)

The development of The Bottle Yard Studios' expansion facility (TBY2)

The ongoing West of England Film/High-End TV Workforce Development Programme, delivered at the Studios

To do this, the Council has partnered with Nordicity and Saffery LLP to gather insights from studio tenants and other suppliers to film and TV productions filmed at TBY1 or TBY2.

Why Your Input Matters

As a supplier to productions filming at TBY, your feedback is essential for TBY to understand how they can continue to support the growth of the region's film and TV production industry. Your voice will help shape future investments and policies.

How Long Will It Take?

We understand you're busy, so we've designed this survey to be as quick and easy as possible. It should only take about 15 minutes of your time.

All questions marked with an asterisk (*) are mandatory.

Contact

If you have any questions, contact:

Louis Underwood at Nordicity (lunderwood@nordicity.com) or

Katherine Nash at The Bottle Yard Studios (katherine.nash@bristol.gov.uk).

1. We value your privacy

All responses are confidential and adhere to GDPR and the Data Protection Act (DPA 2018).

☐ I want more information about data protection and privacy

Data Privacy:
Nordicity and Saffery LLP are committed to protecting the privacy of all survey respondents' personal data and meeting its obligations under the General Data Protection Regulation ("GDPR") and the Data Protection Act 2018.
This online survey questionnaire asks you to share your email address.
We will use this email address to contact you about the delivery of any incentive provided to survey respondents.
We may also use this email address to clarify your answers to certain questions.
In the process of completing the questionnaire, the SmartSurvey online survey platform will also record your IP address.
If you elect to save your partially completed survey questionnaire to resume at a future time, then the SmartSurvey platform will request and separately store the email address that you provide.
Any personal data collected by the SmartSurvey platform will be securely stored and not shared with any third parties other than Nordicity and Saffery LLP. Any personal data collected by the SmartSurvey platform will be permanently deleted 12 months after you submit your completed survey questionnaire.
Further information on SmartSurvey's data privacy policies and practices can be found here.
Nordicity's Privacy Policy can be found here.
A copy of Saffery LLP's Privacy Policy can be found here.
A copy of Bristol City Council's Privacy Notice can be found here.
A copy of The Bottle Yard Studio's Privacy Notice can be found here.

2. Do you agree to allow Smart Surveys, Saffery LLP and Nordicity to securely store your personal data for 12 months from the date that you submit your completed survey questionnaire?

- ☐ YES, I agree. Let's begin the survey!
- ☐ NO, I would not like to share my IP address and email address, and do not wish to proceed with the survey.

3. Is your business a permanent tenant at TBY1?

- ☐ Yes
- ☐ No
- ☐ Don't know/Prefer not to say

4. Where is your company's head office?

*Bedminster, Southville, Windmill Hill, Knowle, Filwood, Bishopsworth, Hartcliffe & Withywood, Hengrove & Whitchurch Park, Stockwood, and Brislington.
**South Gloucestershire or Bath and North East Somerset.

- [ ] TBY1
- [ ] Elsewhere in South Bristol*
- [ ] In Bristol outside of South Bristol
- [ ] In the West of England region outside Bristol**
- [ ] The rest of the UK
- [ ] Outside the UK

5. What were the key reasons for choosing to locate at TBY1?
(Mark all that apply)

- [ ] Price or cost
- [ ] Proximity to film and TV production
- [ ] Type of facility available
- [ ] Proximity to producers and other decision makers
- [ ] Closer contact with crew
- [ ] Geographic location
- [ ] Access to a creative hub at TBY1
- [ ] Better access to industry intel or information
- [ ] Other (please specify):

6. In which year did your company start its tenancy at TBY1?

7. Where is the main location of your business?

*Bedminster, Southville, Windmill Hill, Knowle, Filwood, Bishopsworth, Hartcliffe & Withywood, Hengrove & Whitchurch Park, Stockwood, and Brislington.
**South Gloucestershire or Bath and North East Somerset.

- [ ] South Bristol outside TBY1*
- [ ] In Bristol outside of South Bristol
- [ ] In the West of England region outside Bristol**
- [ ] The rest of the UK
- [ ] Outside the UK

8. Could you please provide the first 2-4 characters of your businesses main location postcode (e.g. BS1 or BS10).

9. What is the name of your business?

10. Please provide either your Companies House or Charity Commission registration number?

11. In which year did your business start operating in the film and TV production industry?

12. What types of production goods or services do you supply to films, TV programmes or other audiovisual production being filmed at TBY?

(Mark all that apply)

- ☐ Accommodation
- ☐ Animals
- ☐ Camera & Grip
- ☐ Casting
- ☐ Construction
- ☐ Costume
- ☐ Couriers
- ☐ Electrical & power
- ☐ Facilities
- ☐ Florist
- ☐ Food
- ☐ Health & Safety
- ☐ Hair and Make Up
- ☐ Locations & location services
- ☐ Lighting
- ☐ Medical support
- ☐ Product placement
- ☐ Props
- ☐ Post-production
- ☐ Rigging
- ☐ Security
- ☐ Special effects
- ☐ Sustainability consulting
- ☐ Transport
- ☐ Waste

- [ ] Water
- [ ] VFX
- [ ] Other (please specify):

13. What is your company's primary area of business in the production supplies and services ecosystem?

(Select only one)

- [ ] Accommodation
- [ ] Animals
- [ ] Camera & Grip
- [ ] Casting
- [ ] Construction
- [ ] Costume
- [ ] Couriers
- [ ] Electrical & power
- [ ] Facilities
- [ ] Florist
- [ ] Food
- [ ] Health & Safety
- [ ] Hair and Make Up
- [ ] Locations & location services
- [ ] Lighting
- [ ] Medical support
- [ ] Product placement
- [ ] Props
- [ ] Post-production
- [ ] Rigging
- [ ] Security
- [ ] Special effects

- [ ] Sustainability consulting
- [ ] Transport
- [ ] Waste
- [ ] Water
- [ ] VFX
- [ ] Other (please specify):

14. Has your company supplied goods or services to films, TV programmes or other audiovisual production filmed at TBY during any of the following years?

(Select all that apply)

- [ ] in 2021 or earlier
- [ ] in 2022
- [ ] in 2023
- [ ] in 2024

15. How many people do you currently employ?

	Full-time	Part-time	Total
Permanent staff			
Temporary/Casual/Contract			
Apprentices			
Interns/Unpaid			
Other			
Total			

6. How many full-time equivalents (FTEs) did your company employ in each of the following years?

in 2021 ☐

in 2022 ☐

in 2023 ☐

in 2024 ☐

17. What portion of your company's FTEs in each of the following years would you say is on account of TBY?
Include the portion of your FTEs devoted to providing goods and services for TV and film productions at TBY
Include FTEs recruited to directly provide goods or services for TV and film productions at TBY
Include FTEs recruited or employed as a direct result of increased income from providing goods or services to TV and film productions at TBY

2021 (%) ☐

2022 (%) ☐

2023 (%) ☐

2024 (%) ☐

18. How does your company's employment change during varying levels of production occupancy at TBY compared to periods in between filming?

19. Are any of your permanent employees located outside of TBY1?

- ☐ Yes
- ☐ No
- ☐ Prefer not to say/Don't know

20. What portion of your permanent employees are located outside of TBY1?
(%)

21. Have you seen an increase in enquiries and work since TBY2 has opened?

- Yes
- No
- Prefer not to say/don't know

22. Approximately what portion of your annual turnover in each of the past three years was earned from projects filming at TBY1 or TBY2?

2022 (%)

2023 (%)

2024 (%)

23. If TBY did not exist, how much lower do you think your total turnover would have been during the past three years?
(%)

24. On account of the Hollywood strikes, how much lower was your turnover in 2023 compared to what you forecast for 2023?
(%)

25. If your business was not based at TBY1, how much lower do you think your annual turnover would have been between 2022 and 2024 inclusive?
(%)

26. How much higher (if at all) do you estimate your company's turnover was on account of the opening of TBY2?
(%)

☐

27. Please indicate the extent to which you agree or disagree with the following statements about your experience as a tenant at TBY1.

Locating my business at TBY1 has...

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
Provided high-quality facilities that improved my company's ability to compete and grow	☐	☐	☐	☐	☐	☐
Increased my company's opportunities to earn more revenue	☐	☐	☐	☐	☐	☐
Increased the certainty, predictability, and stability of my company's revenue from film and TV production	☐	☐	☐	☐	☐	☐
Improved my company's access to skilled workers	☐	☐	☐	☐	☐	☐
Improved my company's access to trainees and apprentices	☐	☐	☐	☐	☐	☐
Improved my company's access to a diverse workforce	☐	☐	☐	☐	☐	☐
Improved my company's ability to	☐	☐	☐	☐	☐	☐

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
reduce its carbon footprint						
Improved my company's ability to meet other environmental sustainability objectives	☐	☐	☐	☐	☐	☐
Increased my employees opportunities to gain creative and technical skills	☐	☐	☐	☐	☐	☐
Gave me and my company's staff a feeling of working at a world-class production facility	☐	☐	☐	☐	☐	☐
Allowed me to deliver my company's products at a lower cost	☐	☐	☐	☐	☐	☐

28. Please indicate the extent to which you agree or disagree with the following statements about your experience as a supplier of goods and services to projects filmed at TBY.

Supplying projects filming at TBY has...

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
Increased my company's opportunities to earn more revenue	☐	☐	☐	☐	☐	☐
Increased my company's opportunities to supply more film and TV projects outside of TBY	☐	☐	☐	☐	☐	☐
Increased the certainty, predictability, and stability of my company's revenue from film and TV production	☐	☐	☐	☐	☐	☐
Improved my company's access to skilled workers	☐	☐	☐	☐	☐	☐
Improved my company's access to trainees and apprentices	☐	☐	☐	☐	☐	☐
Improved my company's access to a diverse workforce	☐	☐	☐	☐	☐	☐
Increased my employees' opportunities to gain creative and technical skills	☐	☐	☐	☐	☐	☐
Gave me and my company's staff a feeling of working	☐	☐	☐	☐	☐	☐

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
with world-class productions						
Allowed me to deliver my company's products/services at a lower cost	☐	☐	☐	☐	☐	☐

29. Specifically in regard to TBY2, how does it compare to other soundstage facilities in the UK?

	Very much better than most	Better than most	Comparable to most	Worse than most	Very much worse than most	Don't know/Not applicable
The soundstages	☐	☐	☐	☐	☐	☐
The workshops	☐	☐	☐	☐	☐	☐
Production office space	☐	☐	☐	☐	☐	☐
Parking facilities	☐	☐	☐	☐	☐	☐
On-site accessibility	☐	☐	☐	☐	☐	☐
Catering	☐	☐	☐	☐	☐	☐
Sustainability	☐	☐	☐	☐	☐	☐

If you have specific comments about any of the above or how they might be improved, please could you provide them below.

30. Please indicate the extent to which you agree or disagree with the following statements about your experience or perception of TBY2.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know/Not applicable
Engaging with TBY2 staff has been a positive experience	☐	☐	☐	☐	☐	☐
I am proud of TBY2's contribution to the local filming infrastructure	☐	☐	☐	☐	☐	☐
I am proud of TBY2's contribution to the national filming infrastructure	☐	☐	☐	☐	☐	☐

If you have specific comments about any of the above, please could you provide them below.

31. Please provide any specific feedback or suggestions for improvement about:
a) Enhancing the facilities at TBY to better meet the needs of film and TV productions.
b) Boosting the reputation of Bristol as a leading location for film and television production.

32. If you have any additional comments or recommendations, please share them below. (optional)

33. How would you like to stay involved in further discussions about the impact and future of TBY1 and TBY2?

(Mark all that apply)

- ☐ Sign up to the TBY1 and TBY2 newsletter
- ☐ Join future stakeholder meetings and interviews
- ☐ Participate in future surveys
- ☐ No thank you, I would not like to stay involved
- ☐ Other ideas, please specify...

34. Please provide your email address so we may contact you about the survey incentive and to possibly clarify any of your answers to the survey questions.

This document was prepared by:

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