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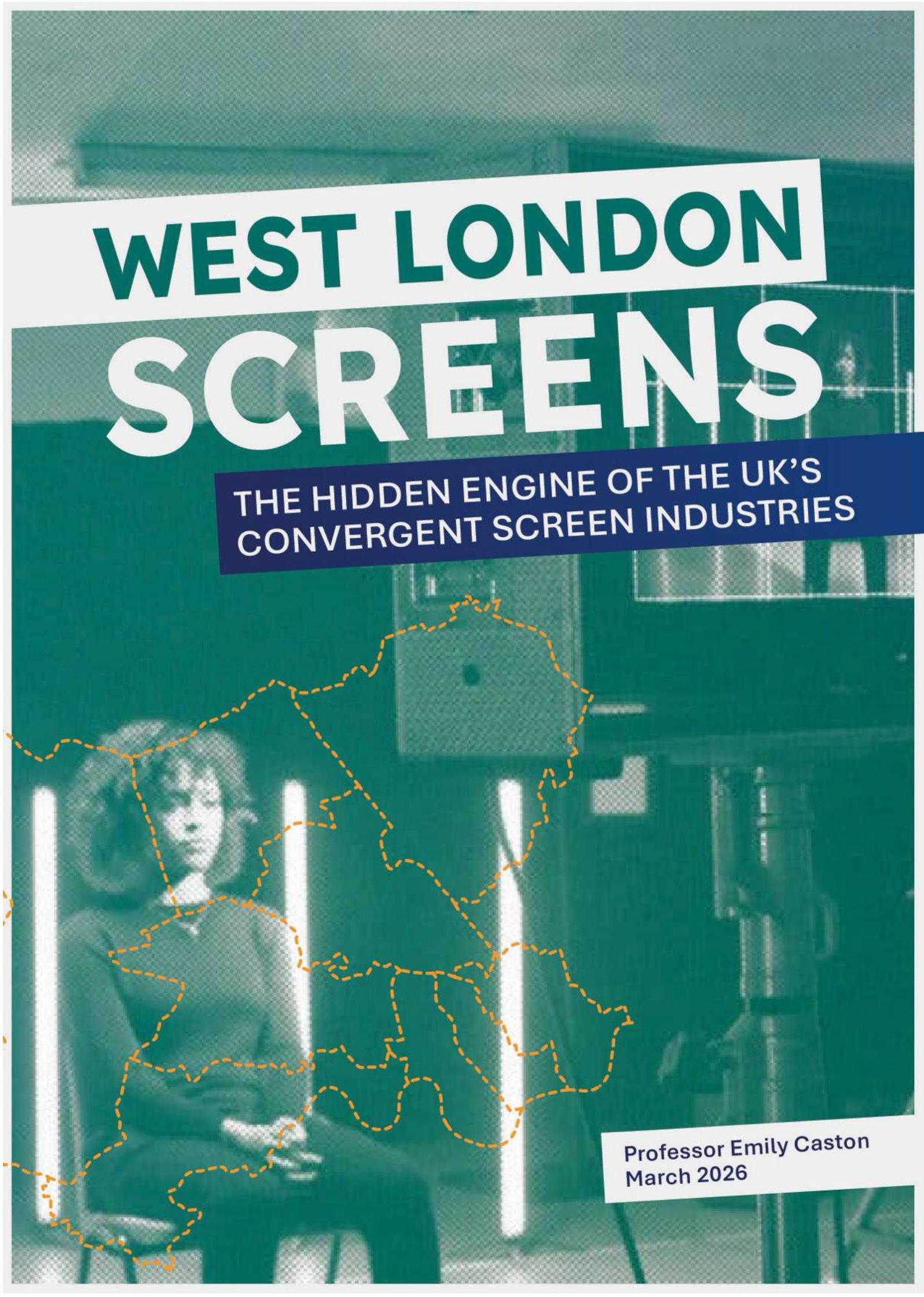
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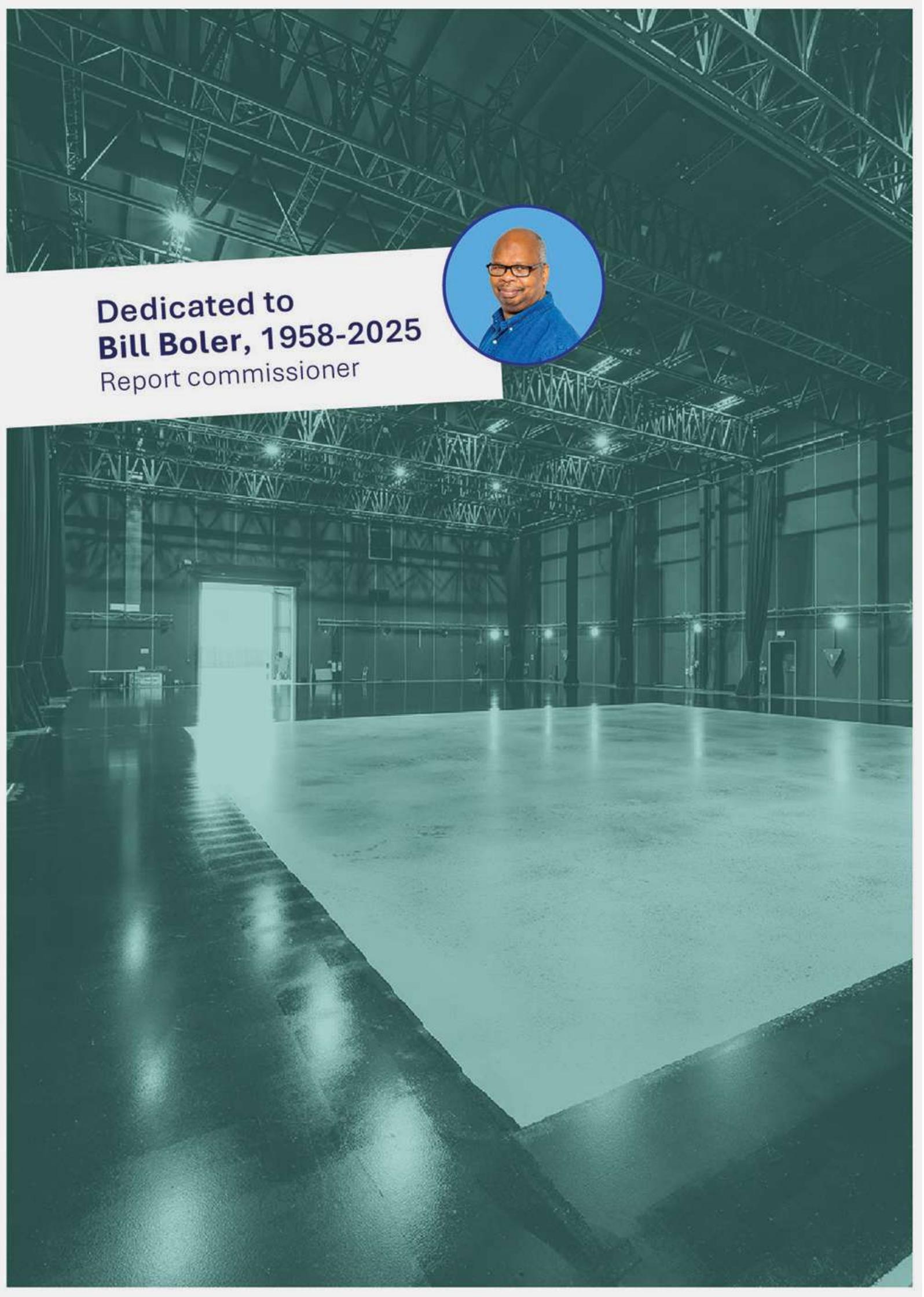
**WEST LONDON**

# SCREENS

THE HIDDEN ENGINE OF THE UK'S  
CONVERGENT SCREEN INDUSTRIES

Professor Emily Caston  
March 2026

**Dedicated to  
Bill Boler, 1958-2025**  
Report commissioner





**A collaboration also involving West London's Creative Enterprise Zones**

**CREATIVE ENTERPRISE ZONE**

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**MAYOR OF LONDON**

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PhD Cantab, MA Cantab, MA Lon

March 2026

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# EXECUTIVE SUMMARY

The United Kingdom is a global leader in convergent screen industries - film, television, games, screen advertising, virtual production, immersive media and digital content - and West London is the engine at the heart of that success. This report presents the first comprehensive mapping of the **West London Convergent Screen Cluster**, a nine-borough production ecosystem spanning Westminster, Hammersmith & Fulham, Kensington and Chelsea, Ealing, Hounslow, Hillingdon, Brent, Barnet and Harrow, and makes the case for its recognition as a nationally strategic asset deserving coordinated policy, investment and identity at the highest levels of government.

Existing analyses of West London's creative economy such as Oxford Economics' 2025 assessment have systematically underestimated the scale and significance of the screen industries by relying on outdated Standard Industrial Classification codes designed for an era when film, television, advertising and games were treated as distinct sectors. This report adopts a broader and more accurate definition of 'convergent' screen industries, the term used by UKRI for its £76 million CoSTAR programme that encompasses not only film and high-end television but screen advertising, branded content, music video, audio production, VFX, virtual production, games and social media content. Using a bespoke Cluster Industrial Classification built with The Data City, the report identifies 6,842 companies operating in the nine boroughs with a combined turnover of £74.5 billion and an estimated annual growth rate of 3.3%. These figures represent a substantial upward revision of previous estimates, and the report argues that even they are likely an undercount.

The Cluster operates as a complete production ecosystem, the only one of its kind in the UK, encompassing the full supply chain from commissioning through production, post-production and distribution. West London hosts the UK headquarters of five major US studios, two of the three leading global streamers, four of the five legacy broadcasters, and four of the top ten advertising agencies by billings. Major games publishers including SEGA, CAPCOM and Warner Bros Games are similarly concentrated in the boroughs. These lead firms do not merely operate locally; their commissioning, financing and publishing decisions activate supply chains that extend across the UK, funding productions in Wales, Yorkshire, Manchester and Scotland. West London is not a competitor to regional screen clusters: it is the national hub that enables them.

The cluster's strength derives from its distinctive structure: a polycentric ecology of historically distinct villages - Ealing, Shepherd's Bush, White City, Hammersmith, Southall, Park Royal, Hounslow's Golden Mile London - each contributing specialised capabilities and integrated through 125 years of accumulated supply chain relationships. Alfred Marshall's concept of the 'industrial district,' where the secrets of a trade become 'in the air', transmitted through dense face-to-face interaction between producers, suppliers and skilled labour, describes precisely how West London's screen cluster functions and has always functioned. The London Underground, and now the Elizabeth Line, has served as production infrastructure as much as transport infrastructure, enabling this dispersed but deeply integrated ecosystem to operate as a

coherent whole. The Elizabeth Line in particular now functions as the cluster's contemporary spine, connecting Heathrow's global gateway through the production nodes of West London into the Central Activity Zone and beyond to the hubs of East London.

The report maps the cluster's supply chain across four tiers, presenting detailed analysis and case studies at each level. Tier 1 producers including Banijay UK and Fragile Films are concentrated primarily in Westminster and Hammersmith & Fulham. Tier 2 suppliers encompass 82 of the UK's 281 identified film studios (29% of the national total), VFX and post-production companies generating over £1 billion in turnover, and the legal, financial and talent infrastructure that supports global production. Tier 3 companies including camera and lighting specialists Panavision (Ealing) and ARRI (Hillingdon), and a rich ecology of props, SFX and construction companies in Park Royal, provide the physical infrastructure that makes large-scale production possible. Tier 4 suppliers such as Brompton Technology in Hounslow, a world leader in LED video processing, represent the cutting edge of British screen technology manufacturing.

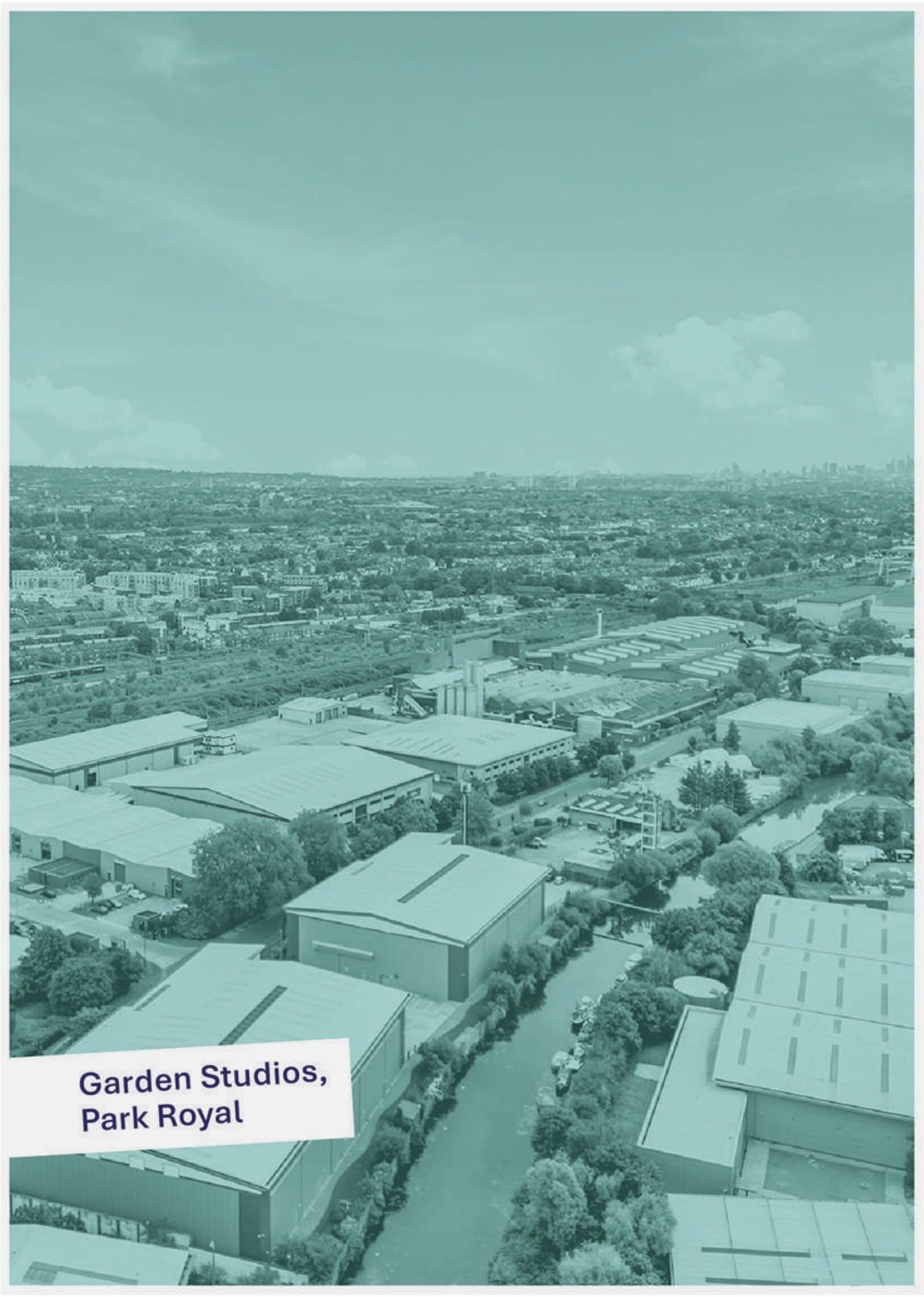
The report identifies significant structural challenges facing the cluster. A growing freelance crisis, with 68% of UK screen freelancers not currently working as of early 2025, threatens to erode the skilled labour pool on which the cluster's competitive advantage depends. Business rates increases of up to 600% following the 2023 revaluation are placing unsustainable pressure on independent studios, the majority of which do not qualify for the partial relief available to the largest facilities. The decline of linear broadcasting advertising revenues has compressed commissioning budgets across ITV, Channel 4 and the BBC. Internationally, UK screen production faces intensifying competition from Canada, Australia and a growing number of European territories actively escalating their tax incentive packages. And geopolitically, the concentration of 65% of UK film production spend in five US studios and three streaming platforms creates structural exposure to American policy shifts of the kind signalled by recent US trade rhetoric.

Against these pressures, the report identifies substantial opportunities. The Independent Film Tax Credit, launched in April 2025, has already produced a 27% increase in BFI certification applications and is generating tangible new demand for West London's independent studio infrastructure. The new UK-India Free Trade Agreement, signed in July 2025, opens major co-production opportunities, with Bollywood productions already committing to UK locations from 2026. The renaissance of advertising-funded content driven by the rapid growth of ad-supported streaming tiers at Netflix, Disney+ and Amazon presents renewed demand for West London's world-class screen advertising production sector. The proposed West London Orbital rail link, currently in design and consultation, would for the first time connect the cluster's principal nodes directly to each other, transforming what are currently fragmented assets into a fully integrated creative district.

The report concludes with seven areas of strategic recommendation. These cover: the development of a unified cluster identity and marketing framework centred on the 'Elizabeth Line Screen Spine;' coordinated engagement with Film London to secure

formal recognition of the cluster within London's screen strategy; a two-tier filming permit fee structure to attract IFTC-qualifying productions; a cluster-wide supply chain discount scheme for independent productions; reform of business rates for screen industry facilities; workforce support through Freelance Worker Hubs and skills development programmes; heritage investment through a West London Screen Heritage Audit and new commemorative infrastructure; and the establishment of a West London Screen Innovation Consortium linking the production ecosystem with the University of West London, Royal Holloway, Brunel and Middlesex University to access UKRI and CoSTAR funding.

The overarching argument of this report is that West London's convergent screen industries are not performing below their weight: they are being measured below their weight. With appropriate recognition, reformed data frameworks, and targeted intervention, the West London Convergent Screen Cluster can be positioned as what it already functionally is: Britain's essential screen production engine, and the foundation on which any credible national screen industrial strategy must build.



**Garden Studios,  
Park Royal**

# INTRODUCTION

The UK is a global success story in convergent screen industries. Recent estimates suggest that West London employs almost 20% of all UK film and screen industry workers, contributing to an industry that generates over £3 billion annually for the British economy (Saffery Champness 2023). However, these figures are likely an underestimate. This report presents a new and more comprehensive overview of West London's **convergent** screen industries. This is a broader category than merely film and television, the focus of previous reports that have relied on data produced by the BFI Research and Statistics Unit. It also includes documentary, branded content, screen advertising production, audio production for screen, VFX and post-production, as well as associated video games and social media. The purpose of this report is to provide measurements and maps of West London's convergent screen industries based partly on West London's heritage in screen, and to make a series of recommendations to protect and maximize the growth potential of these industries amidst current technological, domestic, and global economic risks.

There is a larger economic context to this report. In 2025 a Report published by Oxford Economics concluded that 'West London's economy is punching below its weight. Since the Covid-19 pandemic, its growth has been sluggish, and its productivity has fallen below the London average. West London's position within London makes it easier to attract skilled workers, draw in businesses, and deliver quicker returns from infrastructure investments. Investing in the West London economy could yield substantial returns, for both London and the national economy' (Oxford Economics 2025a). What, if anything, can be done to support the cluster to drive greater productivity? As well as the seven boroughs represented by West London Business and West London Alliance (Ealing, Barnet, Brent, Hammersmith & Fulham, Hounslow, Hillingdon and Harrow), this report includes two additional boroughs - The Royal Borough of Kensington and Chelsea and Westminster – in its geographical scope.[1] This report strives to identify some recommendations for those nine West London boroughs to provide support for those parts of the West London economy involved in screen production. But it also aims to identify whether such sluggishness is a characteristic of the convergent screen industries in West London or whether current statistics mask a more optimistic picture. The overarching conclusion of this report is that, notwithstanding broader economic headwinds, West London's strategic repositioning in advanced screen technologies points to a stronger and more resilient sectoral trajectory than aggregate productivity indicators might suggest.

Businesses in West London's convergent screen cluster have been supported locally by West London's Business's Screen Capital West programme launched in 2021 and nationally and internationally by Film London, the publicly funded body founded in 2003 that promotes and supports London as a world-leading film, media and games production hub. Games has a dedicated support infrastructure provided by Games London which sits inside Film London. Jointly funded by the British Film Institute and the Mayor of London, Film London is responsible for sustaining and developing London's screen industries including film, high-end television, games, VFX and the broader

convergent screen ecology examined in this report. Film London, alongside the British Film Commission and a range of trade associations ranging from The Production Guild to UKIE and the Advertising Producers' Association, facilitates production across the capital, supports skills and talent development, promotes London as a world-leading screen destination. It acts as a key policy advocate for the sector with regional and national government. As the institutional anchor of the London screen cluster, Film London is uniquely positioned to act on the findings and recommendations that follow, and the West London boroughs are encouraged to engage directly with Film London as a strategic partner in realising the growth potential identified in this report.

This report is methodologically grounded in a research paradigm for the analysis of screen industries developed by Caston (2019, 2022, 2024a, 2024b), through research projects conducted in collaboration with the British Film Institute and the Advertising Producers Association, notably the Arts and Humanities Research Council-funded 'Hidden Screen Industries' project and the British Academy-funded 'Archaeology of Screen Advertising Production' project.[2] It also draws on research undertaken for the author's forthcoming publications on the history of London's screen industries and British screen advertising. Existing methods tend to rely on ONS data sources, which in turn depend on SIC and SOC classifications that produce high error rates due to self-reporting and outmoded industrial categories (Caston 2022). This methodology addresses the fact that such errors arise from misconceptions of the screen industries rooted in outdated definitions of 'film' and 'television.' The Data City contributed substantial underlying research to the first part of this report: their contribution encompassed not only data but also innovative analysis of skills and clustering using alternative methodologies for industrial classification. Supplementary analysis using ONS data sources was conducted by Mark Spilsbury. Additional data and industry insights were provided by Michael French, Head of Games London, and Adrian Wootton and Daniela Kirchner, CEO and COO of Film London respectively. Qualitative insights were further enriched through interviews conducted with industry producers and studio managers across West London.

This report proceeds in five stages. First, it presents economic measures of West London's screen sectors based on a convergent supply chain model spanning production, post-production, distribution and support. Second, it assesses the economic realities facing workers, examining employment conditions, skills development and workforce sustainability. Third, it analyses the strengths, weaknesses, opportunities and threats facing the cluster, identifying competitive advantages and contemporary challenges. Fourth, it presents key episodes from West London's 125-year screen history, recovering neglected heritage and demonstrating how the cluster's village-based, transport-enabled structure has generated continuous innovation. Fifth and finally, it proposes strategic recommendations to support and sustain the ecosystem.

## Convergent Screen Industries

The concept of convergence was used by UKRI for its £76 million CoSTAR project (Convergent Screen Technologies and Performance in Real Time). In the screen industries, convergence refers to the structural integration of film, television, games, immersive media and online content within a shared production ecosystem in which common suppliers, technologies and infrastructures (from music composition and art departments to studios, construction, AI pipelines and LED virtual production stages) serve multiple formats and platforms simultaneously. There has been considerable academic discussion of convergence.[4] Programmes such as CoSTAR frame it as the alignment of technological innovation, cross-platform storytelling and industrial collaboration, but in practice it also describes the material reality that these sectors increasingly operate through overlapping skills bases, supply chains and R&D networks.

Although this definition of convergent screen industries is not used in official BFI reports produced by the Research and Statistics Unit, it is consistent with the broader remit of regional screen agency, Film London. It is also consistent with BAFTA's inclusion of video games since the early 2000s and the inclusion of video games by the British Film Institute in the mid 2010s. It is broadly consistent with the DCMS category of 'Film, TV, Video, Radio and Photography', which is defined specifically around the audio-visual sector as covered by the EU Audio-Visual Media Services Directive (motion picture/TV production and post-production, distribution, and sound recording/music publishing) except that unlike Film London, the BFI and BAFTA, DCMS does not include games in that grouping. DCMS classifies video games under a separate sub-sector called 'IT, software and computer services'.

It departs from recent studies such as that published by Saffery Champness (2023) that look solely at high-end TV and film. These reports have excluded significant 'hidden' drivers of innovation and inward investment to the film and TV industries delivered through advertising, branded content and games. Video games is one of the largest creative industries sub-sectors by GVA, contributing around £49 billion, nearly 40% of total creative industries output.[3] Screen advertising production is part of the one of the creative industries sub-sectors which Creative PEC has identified as having the strongest high-growth potential (Bakhshi et al, 2026).

Although such convergence has been perceived by many to have accelerated since digitisation, virtual production and AI, it is important to remember that screen, music and performance have been industrially interconnected both in supply chains and in geographical clusters since the end of the nineteenth century. Much of that interconnectedness has been lost as a result of the methods used by nation states to divide and count industrial activity in separate SIC and SOC codes from the early twentieth century onwards. EMI Records exemplifies the intermedial convergence of music, screen and the performing arts, operating as a cultural production assemblage in which recording, audiovisual media and live performance were structurally and economically co-constitutive from the early 1930s to the present, a convergence which accelerated when EMI formed PMI (Picture Music International) in the 1980s. The

watershed moment for LED screens in concert touring is credited to U2, who used the blue LED invented by Japanese engineers in 1993 for their 1997 PopMart tour.

## Cluster, Districts, Zones and Nodes

West London's screen industries are best understood through Alfred Marshall's concept of the 'industrial district,' articulated in his *Principles of Economics* (1890), which describes how geographic concentrations of specialized firms and skilled labour generate self-reinforcing advantages through what Marshall termed an 'industrial atmosphere' where 'the secrets of the trade are in the air.' In Marshall's framework, industrial districts achieve competitive advantage not through vertical integration within large corporations but through dense networks of specialized firms, skilled workers, and subsidiary trades clustered in proximity, enabling tacit knowledge transfer, trust-based collaboration, rapid problem-solving, and continuous innovation through repeated face-to-face interaction. West London's convergent screen cluster exhibits precisely these characteristics: from 1899 to the present, a constellation of studios and contemporary facilities, specialized suppliers (equipment hire, props, costumes, post-production), creative talent pools, and subsidiary services have concentrated in historically distinct villages connected by London Underground, which functioned as production infrastructure enabling coordination across dispersed nodes while preserving village-level specialization. This structure has proven extraordinarily resilient, adapting across 125 years through silent film, sound cinema, television broadcasting, video production, digital workflows, and virtual production while maintaining essential industrial district dynamics: accumulated skills circulating through labour mobility, knowledge spillovers from informal professional networks, specialized supplier ecosystems reducing transaction costs, and what Marshall described as 'hereditary skill' transmitted across generations of practitioners. The result has been continuous innovation in production techniques, narrative forms, and business models, with content produced in West London's villages distributed globally, shaping British cultural influence and soft power while generating substantial economic value for the UK.

The term 'cluster' is used to denote the socio-economic geographic network of convergent screen industries in the nine West London boroughs as an integrated whole: the full ecosystem of commissioners, producers, suppliers, specialist services, and labour markets concentrated across the boroughs. The term node refers to the distinct sub-areas within that cluster - Soho, White City, the Golden Mile, Chiswick Park, Park Royal, and others - each characterised by a particular functional specialisation. This usage is consistent with Michael Porter's definition of a cluster as a geographic concentration of interconnected companies, specialised suppliers, service providers, and associated institutions in a particular field, linked by commonalities and complementarities across a shared supply chain. It is at the level of the nodes that this report identifies the characteristics of what Alfred Marshall called industrial districts: the geographic concentrations of specialised firms, skilled labour, and subsidiary trades whose proximity generates tacit knowledge transfer, trust-based collaboration, and what Marshall termed an 'industrial atmosphere.' Whilst 'district' implies a defined geographic area with some administrative or planning recognition, 'node' is more of a network/systems concept; it implies a point of connectivity within a larger web, where places are linked by infrastructure and economic flow rather than proximity alone.

The term zone is used in this report exclusively to refer to formally designated geographic areas as defined by local, regional, or central government such as Enterprise Zones. The Mayor of London's Creative Enterprise Zone (CEZ) programme launched in 2018, to provide funding built around four pillars: affordable space, skills support, planning policy, and community engagement. Of the twelve zones now operating across London, West London holds four. Hounslow was among the original six in 2018, establishing Creative Enterprise West along the Great West Road, anchored by Sky, and now embedded within West London Business's Screen Capital West programme. Hammersmith & Fulham and Ealing/Park Royal (led jointly with OPDC) both joined in the 2022 expansion, the former spanning White City to West Brompton and the latter centred on Acton and Park Royal's film studios and maker spaces. Brent (Ealing Road/Alperton, focused on South Asian creative industries) and Westminster's North Paddington (birthplace of Notting Hill Carnival costume design) were added in 2023. Notably, Hillingdon and Harrow remain outside the programme, a gap that both underscores the uneven institutional landscape across the nine-borough corridor and strengthens the case for a cluster-wide framing.

## **Production Corridors and Infrastructure**

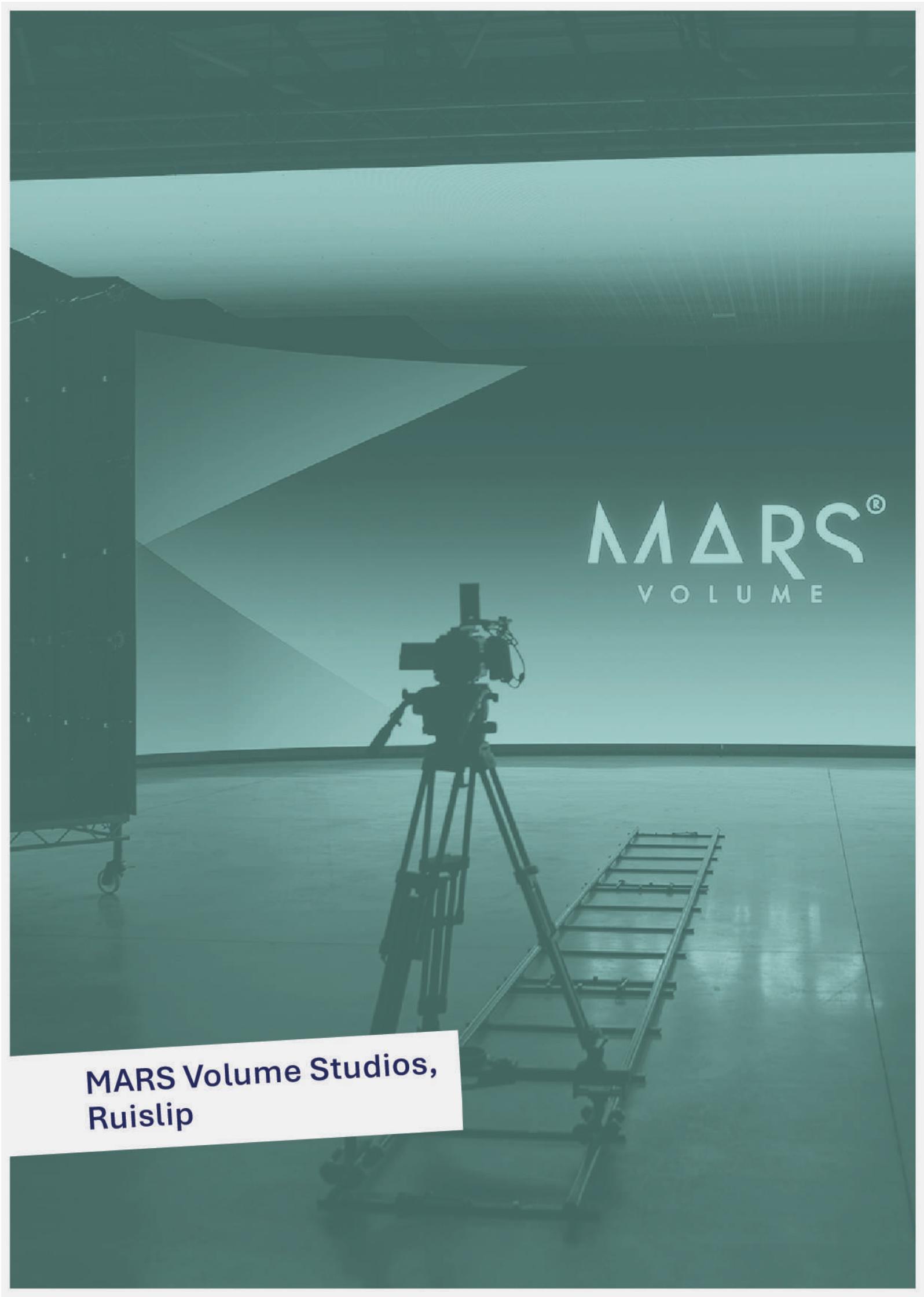
What makes West London distinctive and what elevates it beyond a simple aggregation of local specialisations is that these Marshallian nodes are integrated into a single functioning cluster by both transport infrastructure and road networks. The A40 (Northern Corridor), running from Camden through Westminster, Hammersmith & Fulham, Ealing, and Hillingdon towards Pinewood Studios in Iwer Heath, connects the more established high-end television and feature film supply chain nodes, including White City, Park Royal, and Ealing. The A4 (Southern Corridor), passing through Westminster, Kensington and Chelsea, Hammersmith & Fulham, and Hounslow before reaching Heathrow Airport, supports a concentration of advertising, film technology, and CreaTech nodes. Together, these corridors bind the cluster's dispersed nodes into a single integrated system encompassing the full screen industries supply chain.

Public transport has provided a vital role in the transportation of workers in this cluster. Today, the Elizabeth Line provides the primary public transport spine of the cluster: since its opening in 2022, anecdotal evidence and interview data suggest it has had a strongly positive impact on connectivity, one likely to deepen over future decades. It is important to note, however, that the cluster's constituent districts were already interconnected long before 2022. The Metropolitan, District, Piccadilly, Central, and Hammersmith & City lines together wove the specialised nodes into a coherent whole, enabling the movement of creative labour, talent, and goods across the cluster. The Elizabeth Line has not created this connectivity so much as dramatically enhanced it, compressing journey times, improving east-west links, and drawing previously peripheral nodes more fully into the cluster's gravitational field. By providing faster, more reliable, and more affordable connectivity than was previously possible from London Heathrow through West London to Westminster, the Elizabeth Line allows the screen industries workforce to move between nodes with a fluency that was structurally impossible before its opening.

In this sense the 'in the air' knowledge that Marshall identifies within specialist districts is transported across networks in the cluster as a whole. Concentrations of skilled labour in one borough use the Corridors and Elizabeth Line to carry their skills into another neighbouring borough's nodes. By connecting London Heathrow directly to multiple filming locations, studio complexes, broadcaster headquarters, and streamer offices across the cluster, the Elizabeth Line transforms what was previously an arduous journey from airport to production destination into a fast, comfortable, and straightforward one. For international executives, talent, and production personnel arriving at Heathrow, many making decisions about where to locate productions or establish offices, this connectivity materially improves West London's competitive position and reinforces the cluster's attractiveness as a destination for global screen industry investment.

### The 'Hidden Engine'

West London's convergent screen cluster functions as a driver of the UK's wider convergent screen economy. Paddington Station acts as the gateway to the national rail network, placing West London within three hours of every major UK screen cluster. By road, the M4 (Southern Corridor) runs directly through Hounslow and Hillingdon, linking the cluster westward to Bristol, Cardiff and the wider Celtic nations, while the M40 connects northward through Hillingdon toward Oxford and Birmingham. Continuing via the M40 and M1, and the M6 (Northern Corridor), this reach extends to the two most significant screen clusters outside London: Greater Manchester (home to the BBC's national headquarters in Salford, alongside a concentration of advertising and VFX businesses in inner Manchester) and the West Yorkshire screen cluster, anchored by Production Park, Channel 4's national HQ in Leeds, and a growing network of filming locations across the county. Continuing north, the M6 and M74 connect the cluster to Scotland, where a world-class games industry has its roots in Dundee, long a centre of games education and development, and is anchored today by Rockstar North in Edinburgh, the studio behind *Grand Theft Auto*, with rapidly growing screen nodes in Glasgow and Edinburgh more broadly. West London's unique position as the junction of road, rail and digital infrastructure means it does not simply participate in the UK screen economy: it organises it. HS2 will supplement this connectivity. The construction of the new station at Old Oak Common (adjoining Park Royal in Ealing), a multi-billion-pound infrastructure investment happening inside the West London screen cluster, is a concrete signal of the area's long-term strategic importance and a catalyst for regeneration of the Park Royal/Old Oak opportunity area that will connect the West London Cluster to the creative workforce in Birmingham.



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## THE CLUSTER

The first map presents a measure of West London's activity across the convergent screen industries. As noted above, West London is unusual in containing a full ecosystem and complete supply chain across these sectors. For the purposes of this report, a company is considered part of the ecosystem where two criteria are met: first, that the product consumed directly by the audience centres on an interaction with a screen and screen content as a primary component of the experience; and second, that a significant portion of its supplier activity overlaps with that serving other screen-centred products. This definition encompasses film and television content for legacy media and streaming platforms; virtual production; gaming; immersive experiences for galleries and museums; branded content; advertising; music video; fashion film; content creation for YouTube and TikTok; LED screen usage for live events and live music; generative AI for screens; the streaming economy and mobile platforms; and the production of screen content for education and health. By 'ecosystem' the report denotes integrated industries networked across a supply chain model of screen production comprising commissioners, producers, suppliers, and distributors.

One significant exclusion from this analysis is measures of exhibition or audiences, a category that would encompass cinemas and live event spaces such as Wembley Stadium in Brent, which features extensive permanent LED infrastructure alongside the modular systems that touring production teams bring in for concerts and live events. Wembley Stadium would feature prominently in any report on the exhibition sector in West London, and it purchases and leases products from many of the companies analysed here — among them Brompton Technology, which received The King's Award for Enterprise in 2025 in recognition of its innovative LED technology, deployed at both the Taylor Swift and Ed Sheeran events at Wembley. Taylor Swift's Eras Tour at Wembley was widely regarded as one of the most technically sophisticated LED screen productions in recent touring history.

### Cluster Industrial Classification

The map below is based on a Cluster Industrial Classification (hereafter CIC) built on The Data City system. See note [5] for an explanation of methodology.

The CIC identified a list of 6,842 companies based in the nine West London boroughs of these sectors. The combined turnover of these companies is £74.5 billion. Their estimated growth rate is 3.3% per year. The GVA is just under £7 billion. The GVA per employee is £71, 773.

## The West London Convergent Screen Cluster

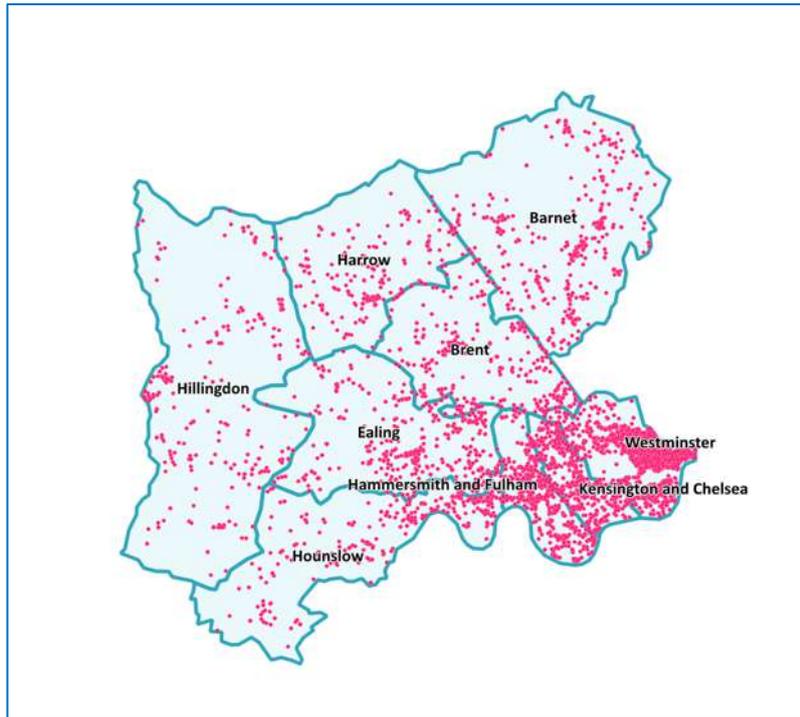


Figure 1: Convergent Screen Industries Clustering in 9 West London Boroughs, February 2026.  
Source: Cluster Industrial Classification built using The Data City SIC, RSIC and RTIC.

In terms of number of businesses, the largest concentration is in Westminster followed by Hammersmith, Kensington and Chelsea, Ealing, Barnet, Hounslow, the City of London, Brent, Harrow and then Hillingdon.

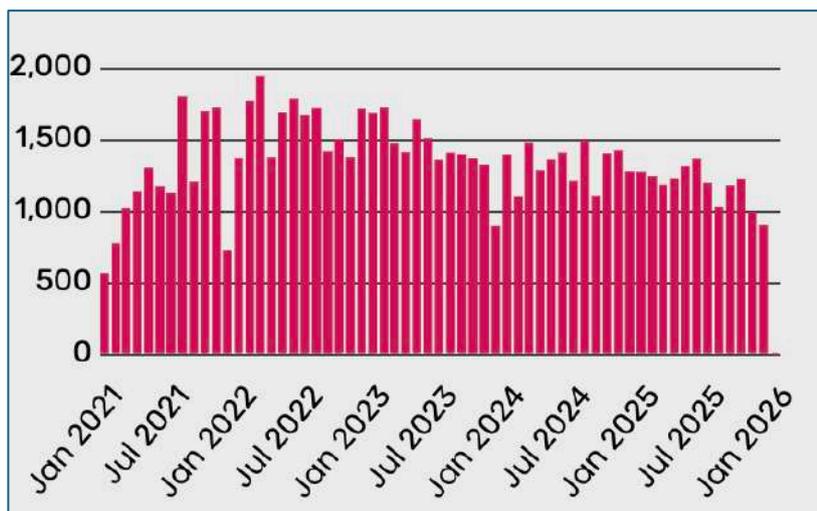


Figure 2: Job Postings West London CIC Convergent Screen Industries, February 2026. Source: The Data City CIC, SIC, RSIC, RTICs.

Figure 2 suggests that job postings for PAYE staff have declined since 2021. However, this does not necessarily mean that overall worker engagement has declined because companies may have been moving PAYE staff onto freelance contracts.

RTIC Sector	Turnover
RTIC0056   Telecommunications	£9.5B
RTIC0068   Media and Publishing	£7.0B
RTIC0064   Digital Creative Industries	£5.2B
RTIC0060   Streaming Economy	£4.8B
RTIC0095   Artificial Intelligence Ecosyst...	£4.6B
RTIC0067   Electronics Manufacturing	£3.3B
RTIC0098   Space Economy	£2.3B
RTIC0055   Net Zero	£2.1B
RTIC0072   Agency Market	£1.8B
RTIC0100   Sports And Physical Activities	£1.7B
RTIC0018   Immersive Technologies	£1.4B
RTIC0094   Future Telecoms Supply Ch...	£1.3B
RTIC0016   Gaming	£1.1B
RTIC0079   Software Development	£925.9M
RTIC0101   Advanced Screens	£897.2M

Figure 3: Turnover by RTIC of West London Convergent Screen Industries SIC, February 2026. Source: The Data City CIC, SIC, RSIC, RTIC.

Figure 3 shows the extent to which the convergent screen industries sit in supply chains for the new high tech industries of 2026, industries which ONS industry classifications do not capture. Media and Publishing, Digital and Creative Industries, the Streaming Economy, and Artificial Intelligence Ecosystem all feature prominently in this list. Immersive Technologies has a higher identified turnover than Gaming. Advanced Screens is a category that The Data City designed in collaboration with academics from the CoSTAR National Lab at Royal Holloway University of London.

It should be noted that due to the methodology this CIC does not include all activity within the supply chains in this ecosystem. The range of industrial classifications under which the supply chains report is so wide and numerous that a detailed and comprehensive analysis of the supply sector was beyond the capacity of this report. However, given the significance of the supply chains economically and socially to the West London economy, it is recommended that a further study is commissioned.

The sections that follow present the supply chain model for convergent screens within which the West London ecosystem operates, and a number of case studies of specific supplier nodes congregating in the boroughs. The lead firm which sits at the top of the supply chain is the commissioning entity. By 'supply chain', this report denotes the interconnected sequence of stages through which screen content moves from initial conception to final consumption by audiences. It encompasses three primary phases. Production is the creation phase where content is developed, financed, and physically produced (pre-production, principal photography/recording, post-production). Distribution is the intermediary stage where content is acquired, marketed, and disseminated to various platforms and territories (sales agents, distributors, aggregators, broadcasting / streaming platforms). Exhibition / consumption is the final stage where

audiences access content (cinemas, television networks, streaming services, physical/digital retail).

Loosely speaking, and not as a strict timeline since elements of supply frequently precede formal production, the screen industries' supply ecology can be modelled as follows. A production company originates and develops content; a commissioning entity then finances that development (effectively engaging the production company as a Tier 1 supplier) in exchange for intellectual property rights and, typically, distribution control. The production company in turn contracts Tier 2 suppliers (studios, locations, post-production houses, and above-the-line talent, often in combination) who themselves procure goods and services from Tier 3 suppliers, cascading onward to Tier 4. In practice, however, this chain is rarely linear or uni-directional.

Supply chains in the screen industries are distinct from other industries in being characterised by four features. They operate on non-linear flows: unlike manufacturing supply chains, screen content often moves through multiple distribution windows simultaneously or in complex sequences (theatrical, SVOD, TVOD, AVOD, physical media). Intellectual property rights are fragmented: different rights (theatrical, broadcast, streaming, international territories) are often separated and exploited independently. There are power asymmetries: major studios and platforms often control multiple stages (vertical integration), creating significant power imbalances with independent producers. Cultural intermediaries play a major role: unlike product supply chains, screen supply chains involve critical gatekeepers (commissioners, buyers, festival programmers) who make subjective value judgments.

## **Lead Firm: Commissioning Entity**

Within the supply chain for theatrical film and high-end television, a production company will turn to a commissioning entity such as a US studio, streamer or legacy broadcaster. In exchange for IP and sales revenue, the entity will provide some or all of the funding to turn the production company pitch into a distributable screen content package.

*Screen Daily* reports that 'In 2024, 65% of total UK production spend on theatrical film and high-end television was accounted for by productions from the five major US studios (Disney, Universal, Sony Pictures, Paramount and Warner Bros) and the three major US streaming platforms (Netflix, Apple and Amazon), also representing a 49% increase in spend in 2024 versus 2023' (Kay 2025). These studios and streamers will commission a British producer or content creator to produce their content, rather than produce the content directly, and will hire UK studios and producers through that British producer / production company.

The top five major US studios are all either based in West London (Hammersmith & Fulham and Chiswick) or in adjoining boroughs. Disney is based in Hammersmith & Fulham. Paramount Pictures and Warner Bros are headquartered in Chiswick Park in Hounslow. Sony Pictures Television and Warner Bros Television Production are based in

Westminster. NBCUniversal/Universal Pictures International is in Central Saint Giles, the Holborn and Covent Garden district of Camden, bordering Westminster.

Of the leading three streamers, one is headquartered in West London (Netflix) and two are in neighbouring London boroughs. Netflix is based in Berners Street in Westminster, in the heart of Soho. Amazon's headquarters are in Shoreditch, with studio production bases outside London at Bray Studios and Shepperton Studios. Apple TV's production offices are within its main UK headquarters at Battersea Power Station in London, run by British television executive Jay Hunt OBE.

Of the legacy broadcasters, four of the five are based in West London. The legacy broadcasting sector has its roots in the analogue era and the early satellite broadcasting industry, most significantly in the formation of BSkyB (British Sky Broadcasting), created in 1990 through the merger of Sky Television and British Satellite Broadcasting, which transformed the UK television landscape and established West London as the centre of British broadcasting. Sky, the successor to BSkyB, remains based in Hounslow (Golden Mile London). ITV is based in Hammersmith & Fulham (White City). The BBC retains BBC Studioworks and the BBC White City campus on the former Television Centre site in Hammersmith & Fulham. Channel 4's London base is in Westminster. Only Channel 5 is based outside West London, in the City of London.

Screen advertising works slightly differently. The original pitch or script has traditionally been developed by the advertising agency. Finance to turn the script into a full production is supplied by the brand via the agency to the independent production company. Four of the top ten advertising agencies in terms of billings in 2025 are based in West London. Three are based in Soho and Fitzrovia (Westminster): BBH, VCCP (Chime) and Adam&Eve DDB. The fourth, Publicis, is based in Hammersmith & Fulham. The Publicis Group employs over 2,000 staff in its new media hub at the Television Centre in White City, including Zenith, Digitas, Publicis Sport and Entertainment and Publicis Commerce. Some West London companies hold in-house advertising agencies. Sky Mobile commissioned its in-house agency Sky Creative to create the 'Switch it Up' campaign starring Idris Elba, which was filmed on the Isle of Wight and produced by Rogue Films.

Of the top games publishing companies, CAPCOM is based in Hammersmith & Fulham, SEGA is based in Hounslow with additional operations in Westminster, and Warner Bros Games London is in Soho, Westminster. Games publishers finance developers in several ways, most commonly by providing milestone-based funding to cover part or all of a game's development budget, alongside marketing, distribution, and platform access, in return for IP ownership or exclusive publishing rights and the right to recoup their investment before profits are shared. This is partly similar to Netflix commissioning a British production company, in that a commissioner funds production and controls distribution, but structurally different in key respects: game publishing typically operates on an advance-and-recoup model with ongoing revenue participation (often over many years through sequels, DLC, or live services), whereas streamer commissions usually involve full budget payment in exchange for extensive rights with limited backend for producers; moreover, game developers sometimes retain IP or negotiate revenue splits,

and the commercial risk profile is generally higher and more hit-driven than in platform-commissioned television.

The three case studies below illustrate how commissioning entities in West London bring value to the rest of the UK as well as to the immediate region.

### **Case Study: ITV White City (Hammersmith & Fulham)**

At White City, ITV brings together several core activities. First, it is a key production base for ITV Studios, housing teams that make and manage a wide range of daytime, entertainment, factual and scripted programming for ITV's linear channels and for global distribution. While some shows are studio-based on site, others are developed, produced, or post-produced there before being filmed elsewhere. Second, White City hosts broadcast and operational functions, including continuity, scheduling, compliance, technical operations and post-production, supporting ITV's national transmission infrastructure. Third, it is a corporate and creative headquarters, home to senior commissioning, editorial, digital, advertising, commercial, and streaming teams, particularly those connected to ITVX, making it a centre for strategy, commissioning decisions and audience development. The location is highly strategic. Being embedded in the redeveloped Television Centre places ITV alongside other creative industries, freelancers, talent, agencies and post-production suppliers, reinforcing West London's role as a dense creative cluster. In practical terms, ITV White City is where programmes are conceived, commissioned, made, packaged, broadcast and monetised, linking creative development directly to distribution, advertising and global exploitation. A key example is the true-story drama *I Fought the Law* (2025), which dramatises a British legal campaign to change the double-jeopardy rule and has been widely praised by critics for its emotional and cultural impact and for bringing recognition to a significant British story. It was filmed primarily in North Wales and Liverpool, with locations chosen to double for the North-West England settings required by the story. Critics in outlets such as *The Times* and *The Guardian* described it as standout television and highlighted the powerful portrayal of that real-life fight for justice, underscoring that kind of programming as meaningful British storytelling.

*Mr Bates vs The Post Office* (2024) was filmed largely in Wales, with a particular concentration in North Wales, alongside some filming in England for institutional and urban scenes. Much of the drama's post office branches, high streets and residential areas were shot in North Wales, including towns such as Rhyl, Llandudno, and nearby coastal and market towns, which doubled for English locations across the UK. These areas were chosen for their intact high streets, adaptable architecture and strong local production support. Liverpool and parts of England were also used for courtrooms, offices and wider institutional settings, supplemented by interiors filmed on controlled locations and stages. The production's reliance on Welsh locations reflects a now-established UK drama model: filming outside London to access cost-effective locations, skilled regional crews and supportive film offices, while telling a story that is unmistakably national in scope and impact. This regional grounding became part of the conversation around the series' cultural resonance and its role in foregrounding a major British miscarriage of justice. *Mr Bates vs The Post Office* was produced by ITV Studios in association with the independent UK company Little Gem, working as co-producer, with

Chris Clough credited as series producer. Little Gem is based in West London and operates as a small, high-end independent drama producer, closely networked into the London TV ecosystem of commissioners, writers, directors and studios, typical of indie companies making authored, issue-driven UK drama of this kind. Other recent examples of British-centred drama on ITV and its streaming service ITVX include *Unforgotten* (2015–present) and *Karen Pirie* (2022–present) (British crime dramas), *Breathtaking* (February 2024, a UK medical drama based on a British memoir), and *Betrayal* (February 2026, a British espionage drama). These commissions demonstrate ITV's ongoing investment in homegrown narratives and talent. Broadcasters including ITV, the BBC, Channel 4 and Channel 5 have jointly called for better policies such as enhanced tax credits to sustain uniquely British storytelling in the face of global streaming competition.

### **Case Study: Netflix (Westminster)**

Netflix has its UK headquarters at 30 Berners Street in London's West End. The location serves as the registered office for Netflix Services UK Limited, which was incorporated there on 18 June 2014. Initially the location served as a registered office address for business operations and legal services. However, in 2020 Netflix undertook a major expansion to support a significant increase in UK production, with fifty British shows in development and an investment in Shepperton Studios. Netflix took over an 87,000 square-foot building on Berners Street (The Copyright Building) from Capita, tripling their London office space. Combined with their existing nearby offices, this gave them around 100,000 square feet in total in central London. The expansion required refurbishment, with staff moving in around 2022. The Berners Street headquarters now supports business operations and administration, legal and corporate services, and UK production activities (including shows such as *The Crown* 2016-2023), and coordinates activities with the UK creative community and the Shepperton hub. *Adolescence* (2025) was filmed in West Yorkshire across South Kirkby, South Elmsall, and Sheffield, using Production Park in South Kirkby (a converted music rehearsal space) as its studio base. This four-part crime drama, filmed entirely in one-shot style, became Netflix's most-watched show globally, with 96.7 million views in three weeks (Andreeva 2025a). *House of Guinness* (2024–2025) was extensively filmed across North West England, including Manchester's Space Studios Manchester (for 35 weeks), the Northern Quarter (Dale Street, Lever Street, Back Piccadilly), Stockport, Heaton Hall, and Ancoats; Liverpool's Stanley Dock Tobacco Warehouse, Croxteth Hall, St George's Hall, and Georgian Quarter; Broughton Hall Estate in Skipton, Yorkshire; the National Waterways Museum at Ellesmere Port and Tatton Park in Cheshire; and Penrhyn Castle in Wales.

### **Case Study: SEGA (Hounslow)**

Sega Europe Limited is the European headquarters and publishing arm of Sega, the Japanese entertainment and video games company known for franchises such as Sonic the Hedgehog, Yakuza, Total War, Football Manager and many others. It is a private limited company incorporated in the UK in 1982. Until recently, SEGA Europe was based in Brentford for many years. In 2025 they moved their headquarters to Chiswick Business Park in West London, a modern campus shared with other creative and tech companies. Chiswick Park houses teams across publishing, marketing, QA, support and other

business functions. SEGA Europe plays a key role in the European market, encompassing publishing and marketing for games distributed in Europe, and operations, support, sales, PR and community engagement for European audiences.

The main UK-based game studios and creative partners associated with SEGA Europe Limited include the following. Creative Assembly, based in Horsham, England, is one of the longest-established British developers under the SEGA umbrella. Founded in 1987 and acquired by Sega in 2005, Creative Assembly is best known for the hugely successful Total War strategy series (including Medieval II, Rome and the Warhammer titles). Sports Interactive, the creator of the globally popular sports simulation franchise Football Manager, was founded in 1994 and acquired by Sega in 2006. It remains independent in its operations while publishing under SEGA Europe. Hardlight, based in Leamington Spa, Warwickshire, is a UK studio founded by Sega in 2012 and fully integrated into SEGA Europe in 2019. It specialises in mobile games, many based on iconic SEGA IP such as Sonic the Hedgehog. Two Point Studios, based in Farnham, Surrey, was founded in 2016 by veterans from classic British studios, including former Bullfrog members, and was acquired by Sega in 2019. Two Point is known for simulation hits such as *Two Point Hospital* and *Two Point Campus*.

Taken together, the geographical data on these lead commissioning entities and the three case studies demonstrate that West London functions not simply as a site of production, but as a concentration of lead firms whose commissioning, financing and publishing decisions activate supply chains that extend across the UK and beyond. From US studios and global streamers to legacy broadcasters, advertising groups and games publishers, companies headquartered in West London mobilise regional studios, independent producers, freelance labour, facilities houses and technology providers in Wales, the North of England, the Midlands and further afield, distributing employment, skills development and cultural visibility well beyond the capital. The ecosystem therefore generates value that circulates outward from West London into other UK clusters and, through international distribution and IP exploitation, into global markets. It is not possible to quantify precisely how much economic value is retained within West London relative to that which flows to other UK regions without access to the internal financial statements, recoupment structures and rights agreements of the commissioning entities themselves. But what can be observed, however, is the structural role of West London as a strategic command node in a national and international screen economy whose benefits are geographically distributed, even if the ultimate allocation of capital and profit remains commercially opaque.

## Tier 1: Producers

Production companies function as Tier 1 suppliers in the screen industries ecosystem because they contract directly with commissioners (such as Netflix), take full responsibility for delivering the finished product, and manage the entire production process including budget, schedule, risk, and compliance. As Tier 1 suppliers, production companies orchestrate the downstream supply chain by hiring and managing all necessary resources (writers, cast, crew, post-production, VFX, and other services) to deliver a completed series or film to the commissioning platform, making them the primary supplier between the commissioner and all subsequent production tiers.

Using a custom search on The Data City, I identified 1,175 production companies in the nine West London boroughs with a combined estimated turnover of £5,684,060,210, of which £2,975,554,632 is attributed to the boroughs. PAYE employment is estimated at 9,618. Westminster leads in terms of business counts (608), PAYE employees (6,900) and turnover (£1,558m). Hammersmith & Fulham is in second place in all three categories: business counts (156), PAYE employees (2,100) and turnover (£778m). Kensington and Chelsea follows in PAYE employees (467) and turnover (£497m) but is fourth in terms of business counts (69). Hounslow is also significant with 29 businesses and £119m turnover.

### **Case Study: Banijay (Hammersmith & Fulham)**

Banijay Entertainment is one of the world's largest independent television and multimedia content production and distribution groups, founded in 2008 by French entrepreneur Stéphane Courbit and headquartered in Paris, with major hubs in London and Amsterdam. Operating through more than 130 production companies across more than 20 countries, Banijay creates, produces, and distributes a vast range of scripted and non-scripted content for broadcasters and streamers worldwide, including globally successful formats such as *Big Brother* (Channel 4/Channel 5/ITV2, 2000–present), *MasterChef* (BBC, 1990–present), *Survivor* (ITV, 2001–2002; revived globally in numerous territories), *Deal or No Deal* (Channel 4, 2005–2016; ITV1, 2023–present) and *Wipeout* (ABC/BBC, 2008–present), alongside high-profile scripted drama such as *Peaky Blinders* (BBC Two/BBC One, 2013–2022) and *Rogue Heroes* (BBC One, 2022–present), while its UK arm encompasses many of Britain's best-known independent producers responsible for hits including *Pointless* (BBC One, 2009–present), *Would I Lie To You?* (BBC One, 2007–present) and *Interior Design Masters* (BBC Two/BBC One, 2019–present). The group also owns Banijay Rights, giving it one of the industry's deepest catalogues of content, and has grown rapidly through acquisition, most notably the purchase of Endemol Shine Group in 2020, cementing its position as a dominant global force in television, live experiences, and digital content, with ongoing expansion in high-growth international markets and continued strategic consolidation within the European production sector.

Its W14 headquarters functions as the group's UK operational and creative centre from which it oversees a large portfolio of editorially independent production labels spanning entertainment, factual, factual-entertainment and scripted drama, making the area one of the most concentrated hubs of TV production in the country. It hosts the central management, legal, finance, HR, business affairs and commissioning liaison teams that support Banijay's UK labels, acting as the interface with UK broadcasters (BBC, ITV, Channel 4, Channel 5) and global streamers. It serves as a creative development hub, where senior executives work across labels on format creation, international adaptations, talent strategy and slate development, particularly in high-volume entertainment and returning series. It plays a key role in rights management and international exploitation, working closely with Banijay Rights to scale UK-originated formats and series globally. The West London location is strategic: it sits close to major broadcasters, post-production facilities, talent agencies and studios, and reflects Banijay's wider operating model: centralised corporate infrastructure paired with decentralised creative autonomy at label level. Banijay's West London base is where UK strategy, deal-making, development and global coordination are anchored, while the actual production work is delivered across its network of UK companies and partner facilities.

#### **Case Study: Fragile Films (Ealing)**

Fragile Films is one of the UK's leading independent production companies, based at the historic Ealing Studios in West London. Founded in 1996 by producers Barnaby Thompson and Uri Fruchtmann, the company has built an impressive and eclectic portfolio spanning feature films, television dramas, and documentaries. Its credits include notable productions such as *Spiceworld* (1997), the Oscar Wilde adaptation *An Ideal Husband* (1999) starring Cate Blanchett and Rupert Everett, the comedy *Kevin and Perry Go Large* (2000), and *Burke and Hare* (2010) directed by John Landis. The company has also produced successful television projects including ITV's *Maigret* adaptations. Committed to creating distinctive and addictive entertainment, Fragile Films works with acclaimed British and American talent across a diverse slate of projects, ranging from period pieces to contemporary comedies, earning multiple BAFTA and Golden Globe nominations along the way.

#### **Case Study: Ridley Scott Associates (Westminster)**

Founded in 1968 by Ridley and Tony Scott, Ridley Scott Associates (RSA) illustrates the operation of producers across multiple supply chains in the convergent screen industries. RSA is a global commercial production company specialising in high-quality, cinematic, and award-winning advertising for major brands. With over 50 years of experience, RSA produces content for clients such as Adidas, BMW, Nike, and Apple, including the famous '1984' spot. Recent film credits of Scott Free, part of the group, include *Gladiator II* (2024), *Alien: Romulus* (2024) and the upcoming *The Dog Stars*, starring Jacob Elordi, Josh Brolin, and Margaret Qualley, scheduled for release in August 2026. RSA continues to produce award-winning commercial campaigns globally and has offices in London, Amsterdam, Los Angeles, New York, Hong Kong and Greater China. In 2023, RSA Films produced the four-part Netflix documentary series *Robbie Williams*, directed by Joe Pearlman.

British independent production companies operate within a challenging boom-and-bust cycle and tend to adopt one of three strategies in response. The first is acquisition by a larger parent company, which provides access to stable cash flow and broader distribution networks. Working Title (Westminster), one of Britain's most successful independent producers, exemplifies this model, operating under Universal as its parent company. Banijay similarly functions as a holding group for over 130 production companies worldwide, including a significant number of British independents it has acquired, among them Kudos, Tiger Aspect, and The Forge.

The second, and more widely practised, strategy is diversification across multiple revenue streams. A 2024 survey conducted in collaboration with the Advertising Producers' Association (Soho) found that member companies operate across a broad range of screen content: 97% in advertising, 58% in music video, 51% in corporate branded content, 45% in fashion film, 41% in documentary, 26% in fiction feature film, and 26% in high-end TV drama (Caston 2025, unpublished).[6] This diversification functions as a structural hedge against sector-specific volatility. Companies with divisions spanning screen advertising and fashion film, for instance, proved considerably more resilient during the Hollywood writers' strike of 2023, whilst those concentrated in high-end television and feature film production were disproportionately affected. Members also reported activity in live events and experience design, extending their revenue base further still.

The third and least common strategy is achieving and sustaining market dominance within a highly specialised niche. A notable example is FooCo (Westminster), founded in 2006 as the UK's first production company dedicated to dental video production and marketing, which continues to provide bespoke digital and video content exclusively for the dentistry sector.

#### *Note on Content Creators*

A 2024 Oxford Economics report showed that British YouTube content creators contributed an estimated £2.2 billion to the UK economy in 2024. The report estimated that these creators helped support the equivalent of about 45,000 jobs across the UK, including both direct creator roles and indirect jobs generated through supply chains, services, and spending by creators and their businesses. Creators' revenues came from a mix of sources: not just platform advertising revenue, but also brand partnerships, merchandise sales, events, and other business lines, all amplified by the exposure they get on YouTube. It was not possible to measure the value of this sector in West London because neither ONS nor The Data City currently collects data on it. It is recommended that further research is conducted to identify freelance workers, sole traders micro businesses producing content for YouTube, TikTok, Instagram and other social media platforms.

## Tier 2: Suppliers

Supply chains are crucial to understanding the West London screen ecosystem because West London holds a disproportionate percentage of companies sitting in Tiers 2 and 3 of the supply chains for screen. Suppliers do not exist in isolation but within a larger ecosystem in which they thrive on other supply chains. There has been greater regional diversification by production companies and location companies in the last two decades, unmatched by regional diversification in supply chains, which have led many regional producers to contract with West London companies and pay for the transportation of goods and services across the UK.

Tier 2 companies supply processed or intermediate goods for the production of screen content. They are contracted by production companies such as Banijay and Banijay's subsidiaries. Categories include studios, acting and literary agents, casting directors, PR agencies, financial and legal services, VFX and post-production houses, musicians and record labels, and construction and props houses.

### ***Tier 2 Sector Focus (1) Studios***

In the USA the film industry developed a model in the early twentieth century whereby the concept of a 'studio' was associated with a 'commissioner' because so many of the early film companies operated as both (Twentieth Century Fox and MGM, for example). However, such a model did not develop in Britain where, instead, most studios, particularly from the 1950s onwards, were operated and owned as independent companies that would be hired on a project-by-project basis by film production companies. Studios include film, TV, photographic, and content creation studios, podcasting and vodcasting facilities, music studios, and virtual production stages.

For this report, a list of all studios operating in the nine West London boroughs was generated from a master UK-wide list created by the author. SIC codes were not used because film studios report under a very wide variety of different SIC codes and, from the scoping study of 200 companies (see Appendices), are not yet uniformly identified by The Data City RSICs. Both lists include large internationally famous stages as well as the scores of smaller studios available to content creators and podcasters.

82 of the 281 studios identified nationally (29.2%) are operating in or registered in West London, with a total turnover of £2,321,354,963, of which £1,035,406,143 is attributed to the nine West London boroughs. The estimated growth rate is 6.7% per year. The best estimate GVA is £97,173,549 and estimated GVA per employee is £95,737. This compares with the national data as follows: the 281 studios have a combined value of £3,054,108,646, an estimated growth rate of 7.2% per year, GVA of £169,186,586, and GVA per employee of £92,756 (February 2026).

In terms of employees, business count and turnover, Hounslow is the most significant borough due to Sky Studios, with 19 businesses, 536 PAYE employees and a turnover of £908.5m. It is important to note that 180 Studios are not included in these figures because the company number for operations in the Gillette building was not identifiable using The Data City metrics. Overall, in terms of business counts: Hounslow 19, Ealing

18, Brent 16, Westminster 11, Hammersmith & Fulham 10, Hillingdon 9 and Barnet 8. Turnovers are as follows: Hounslow £908.5m, Hammersmith & Fulham £26m, Ealing £23.7m, Barnet £21.5m, Brent £10.1m, Hillingdon £122.6k, Harrow £34.3k, the remainder insignificant. It is relevant to note that Barking and Dagenham records £21.6m. All figures are as of February 2026.

Employees in film studios are overwhelmingly freelance and will not appear in The Data City datasets, which collect only PAYE staff. Studios will tend to employ a manager and an administrator, with all other staff on freelance or company supplier contracts. Studios that are owned by producers and commissioners, however, such as Sky, are different and will show up with larger PAYE staff numbers. In terms of PAYE staff, the numbers by borough are as follows: Hounslow 536, Brent 181, Hammersmith & Fulham 87, Ealing 77, Westminster 23, Kensington & Chelsea 6, Hillingdon 4, the remainder insignificant.

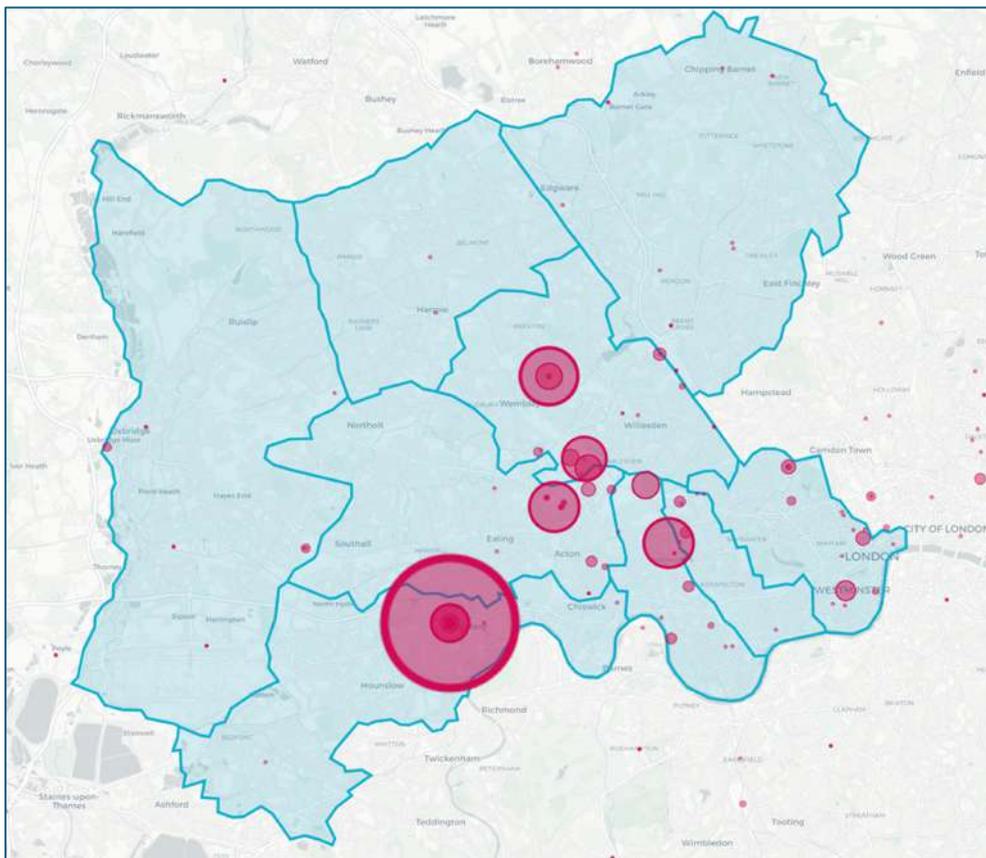


Figure 4: West London Film Studios, February 2026. Source: The Data City.

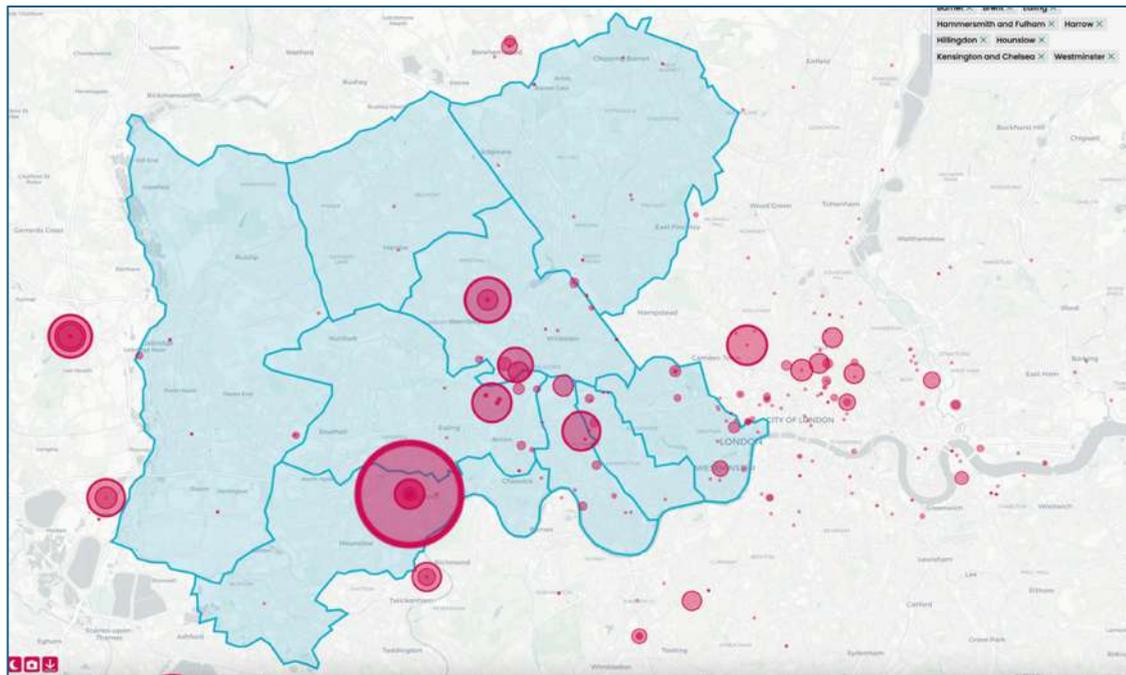


Figure 5: West London Studios in Context, February 2026. Source: The Data City

The data shows that film studios are congregated outside Westminster, where real estate is prohibitively expensive for large stages and where infrastructure does not support vehicle and truck access for building sets and transporting equipment. Studios within Westminster tend to be smaller stages used by content creators and podcasters.

In order to identify issues and trends for West London studios, interviews were conducted with over ten major studios. One studio head explained the extent to which studios operate across diversified supply chains:

*The local authorities' perception of the media industry is outdated. They lump it all into broadcast, which they don't understand anyway but mean film and TV. The lower mid-market that we serve is very contemporary in terms of the media output. But there's no conception of how people are using it. They keep using terms which are dated and therefore unhelpful. All the studio people say: please stop using these terms. It's the media industry. It's not the film industry, the TV industry, or the broadcast industry. Studios are now used for everything from podcasting to social media output to TV. There's a lag in terms of how people recognise the way our industry has evolved and how it should be supported and recognised at a regional level.*

Interviews with the independent studios reveal that up to 60% of their bookings arise from short-form content (commercials, music videos, fashion film and stills, corporate and branded content, YouTubers and other content creators, and live music rehearsals for tours). Feature films, high-end scripted television and high-end non-scripted content (i.e. reality rather than documentaries) constitute a minority of bookings. The interviews

suggest that reliance on short-form clients protected these studios from the worst losses experienced by larger facilities such as Pinewood during the Hollywood writers' strike; active trading in short-form production may therefore be a structural advantage.

The interviews also reveal that many independent studios are sustaining their businesses by dry-hiring camera, lighting and grip equipment and by running skills academies. Their entrepreneurial business models and willingness to diversify in response to market shifts is notable.

One studio reported that its business sat across the supply chain as follows: music videos 25%, fashion stills and films 20%, product shoots 15%, documentary 10%, theatre 10%, dance 5%, short films 5%, podcasts 5%, and various other content creation 5%. Another reported branded content 20%, TV 25%, commercials 25% (including fashion stills and film), music (rehearsals and music videos) 10%, events 5%, and feature films (pick-ups only) 15%. Another, specialising in virtual production, reported that short-form branded content (commercials, music videos etc) constituted 60% of its business with high-end TV 30%, and feature films 10%.

Other studios operate in targeted sector markets. IMG Studios, for example, in Stockley Park near Heathrow, produces major sports coverage including Premier League football, Major League Soccer, Ryder Cup golf and the Saudi Pro League. Film Medical Services and Mediscene Ltd (Hillingdon), based at West London Film Studios in Hayes, have partnered to create The Hospital Studios, the UK's only dedicated medical film studio facility. It includes fully equipped hospital sets such as operating theatres, wards, ICU facilities, mortuary and pathology labs, GP surgeries and MRI scanners. The facility has been used by productions including *Luther* (BBC One, 2010–2019), *Silent Witness* (BBC One, 1996–present) and *Topsy and Tim* (CBeebies, 2013–2015), and is located at West London Film Studios, Springfield Road, Hayes, approximately three miles from the M4/A40.

### *Tier 2 Sector Focus (2): VFX and Postproduction*

VFX and postproduction is a high-growth area of the British screen industries within the Tier 2 layer. A custom classification for it has been created for this report. VFX and postproduction are integrated with virtual production, gaming and AI, although it is none of those things in itself. Rather, it is a sector which emerged in the UK from the 1970s onwards in response to market opportunities arising from the development of new video technologies (Caston 2024c). The UK has been a primary competitor to the USA since the 1980s, when the British-owned MPC was the main competitor to Industrial Light & Magic, founded by George Lucas. Since the 2010s, however, the sector has increasingly outsourced work to labour markets in Asia (Caston 2022). It was a VFX postproduction company that developed the technology for ABBA Voyage (Caston 2025).

The custom classification was used to create a new dataset of VFX and postproduction companies in the UK using The Data City tools. This shows that nationally 156 companies are producing an annual turnover of just over £1.5 billion, with estimated growth of 17.4% (February 2026). Of those 156 companies, 70 (just under half) are based in the nine West

London boroughs. Although the number of businesses is just under half of the national total, their estimated turnover is significantly higher: just over £1 billion, growth of 17.6%, and GVA per employee of £87,909.

This sector, which does not require large real estate footprints, is heavily concentrated in Westminster which has 62 of the of the 70 companies. In terms of borough distribution: Hammersmith and Fulham has five companies, with an estimated turnover of £35,466,615 and growth of 6.5%; Hillingdon, Hounslow and Harrow have no companies; Harrow has one; Ealing has one (BBC Studioworks); Barnet has two; Brent has one; Kensington and Chelsea has none. The combined total is 72 rather than 70 because two companies operate across borough boundaries and are counted in more than one borough. Further research on this sector is needed, as it is likely that sole traders and microbusinesses working in VFX and post-production are not being fully captured by this metric. The two charts below illustrate the shifting financial fortunes of this sector and trends in job vacancies.

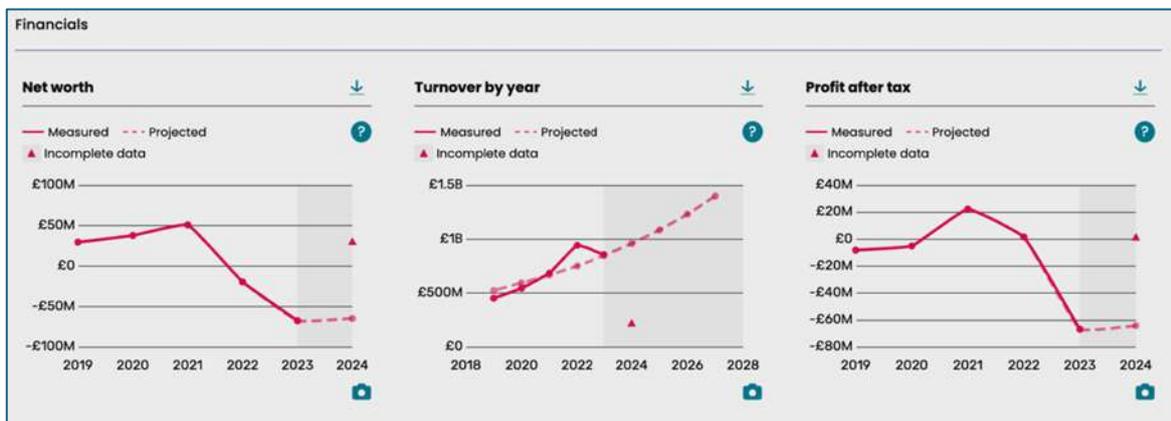


Figure 6: Financial Data for VFX and Postproduction, February 2026. Source: The Data City.

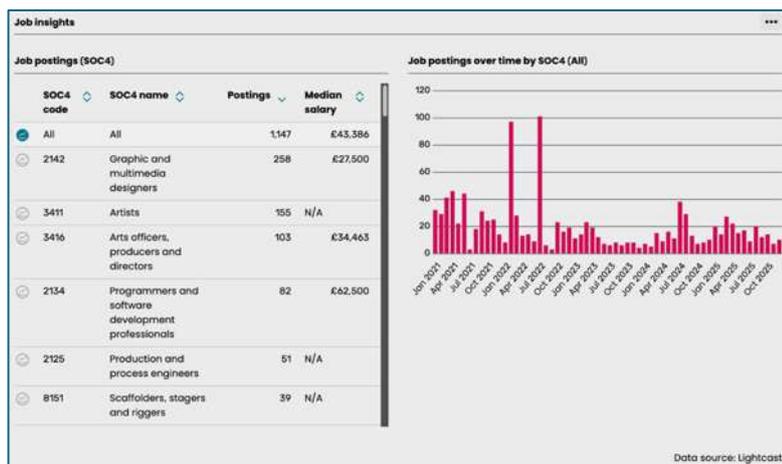


Figure 7: Job Postings for VFX and Postproduction, February 2026. Source: The Data City

## Tier 3: Suppliers

This layer includes camera houses, LED rental facilities, security, construction and catering. It is within the Tier 3 supply layer that the outer West London boroughs, such as Hillingdon and Ealing, are heavily represented. Traditionally, this may relate to the availability of space. These companies rarely report under screen-specific SIC codes. Some supply chain companies such as props hire, lighting, grip, rigging and camera equipment, catering, carpentry and casting report under 77291 'Renting and Leasing of Media Equipment'. However, many do not appear in ONS datasets because they report under other codes such as 82990 'Other Business Support Service Activities Not Elsewhere Classified' (used by companies such as Machine Shop SFX and Metro Rigging), 56210 'Event Catering Activities', and 56103 'Take Away Food Shops and Mobile Food Stands' (codes commonly used by studio catering companies). Even MARS Volume, a Tier 1 supplier, does not report under a dedicated creative SIC code, but instead under its parent company Bild Studios using SIC code 62020 'Information Technology Consultancy Activities'.

### Tier 3 Case Study 1: Panavision (Ealing)

Panavision operates Panavision UK & Ireland from Greenford (UB6). This is the main UK location for Panavision UK & Ireland's camera, lens and equipment rental operations, from which they serve major film and high-end TV productions across Britain and Ireland. Panavision Grip & Remote Systems is the specialist arm for grip, crane and remote equipment rentals. Panavision incorporates Panalux (which in 2024 relocated to new premises in London Borough of Hillingdon), Island Studios and Duke Island Studios (both of which are close to Park Royal in London Borough of Ealing).

From its base in Ealing, Panavision operates a highly developed national logistics and technical support model that enables large-scale productions to shoot well beyond the capital. Camera, lens and lighting packages are routinely prepared in West London and transported by dedicated fleet to regional studios and locations across the UK (including Wales, Scotland, Northern Ireland and the English regions) accompanied, where required, by Panavision technicians who provide on-site commissioning, maintenance and rapid replacement throughout the shoot. This system allows regional productions to access world-class equipment and expertise without duplicating infrastructure locally, meaning that West London functions as a national hub whose specialist capacity underpins production activity across the UK. Crucially, there are no other camera and lighting suppliers of comparable scale or integration located outside London on which the regions can consistently draw for high-end film and HETV production, reinforcing West London's role as an enabling engine for regional growth rather than a competitor to it.

A large proportion of major feature films shot in the UK have relied on Panavision cameras, lenses and lighting, reflecting Panavision UK's long-standing integration with studios such as Pinewood Studios, Warner Bros. Studios Leavesden and Shepperton Studios. Notable examples include the *Harry Potter* franchise (2001–2011, Leavesden), *Skyfall* (2012, DP Roger Deakins), *The Dark Knight Rises* (2012), *Star Wars: The Force*

*Awakens* (2015) and *Mission: Impossible – Fallout* (2018), all of which involved substantial UK production supported by Panavision systems. Prestige cinema such as *1917* (2019), *Gladiator* (2000), *Les Misérables* (2012) and the *Fantastic Beasts* films (2016–2022) further demonstrate Panavision’s dominance in large-scale inward-investment features requiring bespoke lenses, robust lighting packages and close collaboration with DPs and VFX teams. Flagship TV and streaming series such as *The Crown* (2016–2023), *Game of Thrones* (2011–2019), *Peaky Blinders* (2013–2022) and *House of the Dragon* (2022– ) have also made extensive use of Panavision cameras, lenses and lighting. These productions exemplify how Panavision UK has become embedded in the country’s HETV ecosystem, supporting long-running, visually ambitious series where consistency across seasons, close director-of-photography relationships, and the ability to scale complex lighting and camera workflows are critical.

### **Tier 3 Case Study 2: ARRI (Hillingdon)**

ARRI, a German company, first established a dedicated presence in the United Kingdom in 1983, when ARRI GB was opened with a local marketing and sales team under Derrick Ross and Paul Wild. This was the first time ARRI had a specific UK office focused on both camera and lighting products, and it later expanded to include a rental business to serve British productions directly, a facility that continues to be an important hub for ARRI equipment in film and television today. The ARRI Rental operation routinely delivers equipment to regional studios and on-location shoots in England, Wales, Scotland and Northern Ireland. This typically involves advance preparation at the London-area facility, scheduled transport to the region, and ongoing technical support, either remotely or via travelling technicians for larger productions.

ARRI has supplied cameras, lenses and lighting to a vast range of major international film productions across both the analogue and digital eras, with its systems now among the most widely used in global cinema. ARRI film cameras were long established on prestige features, and in the digital era the ALEXA family in particular has become dominant, used on films such as *Skyfall* (2012), *Hugo* (2011), *Gravity* (2013), *Birdman* (2014), *The Revenant* (2015), *1917* (2019), *Dune* (2021), *The Batman* (2022) and *John Wick: Chapter 4* (2023), alongside many other studio blockbusters and award-winning independent films.

ARRI transports kit for shoots outside London, but it operates on a different model from Panavision. However, unlike Panavision’s highly centralised UK-wide hub model for both camera and lighting at national scale, ARRI’s rental activity is more project-specific and distributed, with many regional productions mixing ARRI cameras with lighting from local or independent suppliers. As a result, while ARRI certainly supports regional filming, the UK does not have a comparable non-London, fully integrated camera-and-lighting supplier of equivalent scale, meaning that London, and particularly West London, remains the primary national base from which high-end equipment is mobilised to the regions.

### **Tier 3 Sector Focus 1: Art Department**

Of the national list of art department and construction companies compiled for this report, 47 of the 281 companies were registered or trading within the nine West London boroughs. The list includes businesses specialising in set construction and design, prop hire, and specialist prop hire (e.g. weapons, live plants, medical equipment and vehicles). This means that 16.73% of all identified firms in the sector are located in West London. These businesses tend to be independently British-owned companies, with a relatively high degree of alignment between their registered and operating addresses.

Estimated total turnover across the national sample is £114,453,148, of which £37,476,429 is attributed to companies in the nine West London boroughs. While this represents just 16.73% of firms, it accounts for 32.74% of total national turnover. Estimated GVA stands at £26,086,111 (February 2026), with sector growth at 4.6%. The contrast between firm share and turnover share is significant: although less than one-fifth of the companies are based in West London, they generate nearly one-third of total national turnover. This indicates that West London firms are, on average, larger and commercially more productive than their counterparts elsewhere, demonstrating a clear concentration of economic weight within the region rather than merely a proportional presence of businesses.

Ealing has the largest business count in this list, followed by Hillingdon, Brent, Barnet, Harrow and Westminster, while the remaining boroughs account for relatively small numbers. In terms of PAYE employees, the ranking is Brent, Westminster, Ealing, Hillingdon, Harrow, Barnet and then Hounslow. In terms of turnover, Westminster leads with £5.8m, followed by Brent (£5.2m), Ealing (£2.6m), Hillingdon (£580.8K), Harrow (£498.4K) and Barnet (£371.5K), with the remaining boroughs again accounting for relatively small totals.

Park Royal in Ealing has a heavy concentration of suppliers, particularly in SFX, props and construction. Get Set Hire reports under SIC code 77390, 'renting and leasing of other machinery, equipment and tangible goods not elsewhere classified.' Granger Hertzog Prop Hire and Furniture Rental reports under 96090, 'other service activities not elsewhere classified.' Beat About the Bush reports under 77390, 'renting and leasing of other machinery, equipment and tangible goods not elsewhere classified.' Superhire Props Ltd reports under 82990, 'other business support service activities not elsewhere classified,' as does Marshall Davenport (previously Superhire Ltd). The Stockyard Ltd also reports under 82990, 'other business support service activities not elsewhere classified,' as does Machine Shop.

RTIC sector counts	Employees by RTIC sector	Job postings by RTIC sector
RTIC0064   Digital Creative In... 6	RTIC0064   Digital Creative In... 226	RTIC0064   Digital Creative In... 22
RTIC0101   Advanced Screens 2	RTIC0101   Advanced Screens 217	RTIC0101   Advanced Screens 21
RTIC0068   Media and Publis... 1	RTIC0068   Media and Publis... 1	RTIC0068   Media and Publis...
Turnovers by RTIC sector		
RTIC0064   Digital Creative In... £23.6M		
RTIC0101   Advanced Screens £23.0M		
RTIC0068   Media and Publis... £43.0K		

Figure 8: Art Department by RTIC, February 2026. Source: The Data City

Physical set construction and props hire is a sector in the supply chain that interacts directly with digital and virtual production, as virtual production stages have moved towards creating digital backgrounds. The above chart from The Data City of set construction and props suppliers shows that a significant number of companies are flagged as ‘Advanced Screens’. This means that, in order to enter these physical skills sectors, new entrants will also need digital skills: they will be expected to use AI software for the visualisation and creation of sets, or to work in teams in which other members can supply those skills.

### Tier 3 Sector Focus 2: Music, Sound Design and Audio

The second sector focus list generated for this report within Tier 3 of the supply chain examines companies supplying music, sound design and audio for the convergent screen industries. 26% of the companies in this sector are concentrated in the nine West London boroughs. The vast majority, 60 of the 77 companies identified in West London, are based in Westminster, underlining the extent to which Soho remains the dominant cluster for audio as well as visual post-production in London. However rising business rates, the reshaping of Soho associated with the Elizabeth Line, and the shift of much audio work to remote workflows (often utilising real estate outside London and, in some cases, outside the UK) have contributed to a marked decline in this concentration. By way of example, in December 2025, Wave Studios entered administration. This was the company at which Johnnie Burn worked and served as a director when he won the Academy Award for Best Sound for *The Zone of Interest* (2023, Jonathan Glazer). A combination of rising costs, the difficulty of sustaining traditional studio operations in a changing market, and broader financial pressures led to the UK company declaring insolvency. The US company continues to operate, as does the Wave brand. However, its closure following a number of other audio company closures in the past five years signals wider structural shifts in the shape of the UK’s audio and post-production sector within the creative industries.

### ***Tier 3 Sector Focus 3: Freight and Transportation***

The transportation and logistics segment of the West London screen industries supply chain is also of note, showing that Hillingdon has played a strategic role as a hub for specialist freight, mobility and production support services. Global Motion, for example, located within the Creative Industries Cluster (CIC) for West London, is a leading transportation specialist for the music and entertainment industries, based in the London Borough of Hillingdon. Other screen-industry transport and logistics companies operating in Hillingdon include MAPCARGO International, Freight Minds, Rock-It Cargo, ACP Worldwide, and The Freight Company Global. This is in part because of the close proximity of Pinewood Studios. Although technically just outside the borough boundary in Buckinghamshire, Pinewood Studios has been economically, socially and logistically intertwined with Hillingdon since its founding before WWII. A substantial supply chain support infrastructure developed there as a result. The borough has provided housing, light industrial capacity, warehousing and transport connectivity for studio operations at Pinewood ever since.

But it is also because Heathrow Airport is largely based in Hillingdon. Heathrow Airport functions as the principal air-freight gateway for the UK's screen industries, live entertainment sector and high-value creative technology supply chains, and its proximity to West London's production ecosystem is a structural asset of the cluster that is rarely acknowledged in policy analysis. Heathrow handles by far the largest share of UK air cargo by value and is the airport most commonly used for time-sensitive or fragile equipment (cameras, lenses, lighting systems, broadcast hardware, and specialist production technology) moving between international production centres and UK studios. Major international live tours playing venues such as Wembley Stadium or The O2 Arena typically transport staging, lighting and screen systems by road between European venues but rely on air freight for intercontinental legs, with Heathrow the most likely UK entry point given its cargo capacity and specialist logistics infrastructure. High-value components of LED display systems, imaging and technical equipment manufactured in Europe or Asia may arrive by air through Heathrow before being transported by road to studios or venues across West London; larger stage structures or bulk LED panels are more commonly shipped by sea unless rapid delivery is required. In each case, Heathrow's position at the western terminus of the A4 Southern Corridor provides rapid onward road connections to studios, media companies and event venues across the cluster, effectively making it the international logistics gateway for West London's convergent screen and live entertainment industries.

## Tier 4: Suppliers

A Tier 4 supplier provides foundational raw materials, primary processing, capital equipment, or core scientific inputs to Tier 3 suppliers, sitting four steps removed from the end producer or market.

### **Tier 4 Case Study: Brompton Technology (Hounslow)**

Founded in 2011 and located on the 'Golden Mile' in Hounslow, Brompton Technology is the UK market leader in the manufacture and provision of LED video processing systems for high-demand applications across virtual production and ICVFX, live events and touring, corporate and education, broadcast and studio, and esports. It supplied processors to Mars Volume for the production of the BBC film *Dinosaurs: The Final Day with David Attenborough* (2022), for Ed Sheeran's Mathematics Tour (2022), and for Taylor Swift's Wembley set (2024). Its Tessera system is used on everything from global stadium tours to pioneering virtual production and XR studios. Brompton demonstrates the analytical value of The Data City's Real-Time Standard Industry Classifications (RSICs). Although it has not yet been assigned a primary Real-Time Industry Classification (RTIC) by The Data City, it reports under SIC code 28990 ('manufacture of other special purpose machinery not elsewhere classified'), which does not explicitly identify it as part of the screen industries. The Data City, however, classifies its activities under its RSIC codes 59111, 77291, 90020, and 59112, all screen-related categories.

Brompton Technology plays a broader role within West London's ecosystem. It acts as a network orchestrator, brokering and building relationships across stakeholders, sectors and scales, with the potential to operate as a full ecosystem intermediary. It hosted the West London Screen Industries Revealed networking event in 2025 and supports start-ups such as Unit 1A, which uses technologies paralleling those used in ABBA Voyage to stage virtual live music events. A case could be made for targeted public sector investment in Brompton Technology as an innovation intermediary bridging academia, industry, funders and government.

Brompton sits within the technology infrastructure layer that enables high-end screen production. The company designs and manufactures LED video processors including the Tessera range and associated control software for image fidelity, colour accuracy, frame synchronisation, HDR and low-latency playback. It does not manufacture LED panels. Instead, it sells its processors primarily to manufacturers in China, where LED panels are produced, and these companies then sell finished products back into UK and global markets. Brompton Technology is therefore exposed to geopolitical trade dynamics, including US tariffs on Chinese manufacturing. Its technology underpins the supply chain for virtual production stages, in-camera VFX, live-action and real-time rendering pipelines, high-end broadcast and live events.

## Cluster Long Term Patterns 2014-2024

For this section, ABS data is used. It was not possible to use the dedicated West London CIC to extract a longitudinal measure because The Data City does not currently provide historical datasets. The ABS (Annual Business Survey) is a sample survey that draws its sample from the ONS IDBR (Inter-Departmental Business Register), which covers around 2.7 million businesses but excludes very small businesses operating below VAT and PAYE thresholds. Using a list of 30 SIC codes identified from a scoping study of 200 companies operating in West London in the convergent industries, conducted by the author, an examination was undertaken of enterprise count, turnover and PAYE employment among those businesses operating in the nine boroughs and reporting under the 30 SIC codes.

The analysis showed that in 2024, total turnover was £13.5 billion, representing 44% of the London total and 26% of the UK total. Longitudinally, there was no visible decline in the number of enterprises in West London since 2014. There had been an increase of 9% since 2014 and 5% since 2019.

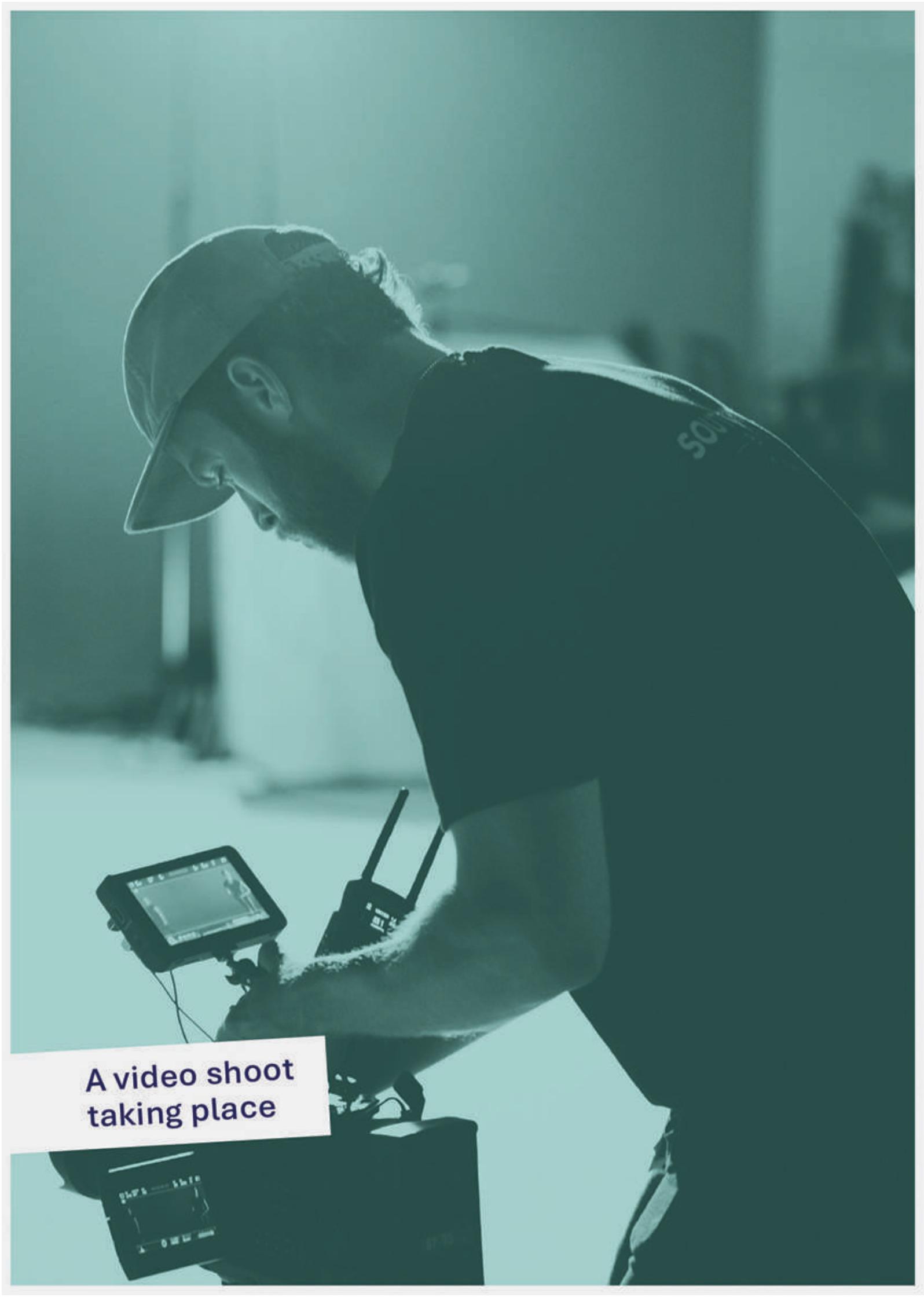
Data from ONS's IDBR dataset covering 2014–2024 shows that in 2024 there were 11,835 enterprises in these sectors in the nine West London boroughs. These West London boroughs comprise 34% of the London total in these sectors and 145 of the UK total. Compared with 2014, the West London boroughs have seen an increase of 975 enterprises, an increase of 9%. This was lower than the change across London (an increase of 22%) and the UK (27%). Compared with 2019, the West London boroughs have seen an increase of 575 enterprises (5%), again lower than the London increase (8%) and the UK (12%). Much of the increase from 2019–2024 has been concentrated in Westminster, with five of the other boroughs showing a decline.

	Number of enterprises			Change 2014 - 2024	Change 2014 - 2019	Change 2019 - 2024	
	2014	2019	2024			2019	2024
<b>Ealing</b>	1,045	1,095	1,080	35	3.3	-15	-1.4
<b>Hammersmith &amp; Fulham</b>	1,330	1,220	1,170	-160	-12.0	-50	-4.1
<b>Hillingdon</b>	280	340	400	120	42.9	60	17.6
<b>Hounslow</b>	605	640	630	25	4.1	-10	-1.6
<b>Westminster</b>	4,445	4,710	5,385	940	21.1	675	14.3
<b>Barnet</b>	925	995	985	60	6.5	-10	-1.0
<b>Brent</b>	845	880	880	35	4.1	0	0.0
<b>Harrow</b>	295	315	335	40	13.6	20	6.3
<b>Kensington and Chelsea</b>	1,090	1,065	970	-120	-11.0	-95	-8.9
<b>All WL Boroughs</b>	<b>10,860</b>	<b>11,260</b>	<b>11,835</b>	<b>975</b>	<b>9.0</b>	<b>575</b>	<b>5.1</b>
<b>London</b>	<b>28,845</b>	<b>32,610</b>	<b>35,215</b>	<b>6,370</b>	<b>22.1</b>	<b>2,605</b>	<b>8.0</b>
<b>UK</b>	<b>65,880</b>	<b>74,205</b>	<b>83,430</b>	<b>17,550</b>	<b>26.6</b>	<b>9,225</b>	<b>12.4</b>

Figure 8: Number of enterprises in Screen and Creative Industries. Source: ONS, IDBR, 2025. List of SIC codes used see Figure 12.

<b>Code</b>	<b>Title</b>
<b>18202</b>	Reproduction of video recording
<b>18203</b>	Reproduction of computer media
<b>26701</b>	Manufacture of optical precision instruments
<b>26702</b>	Manufacture of photographic and cinematographic equipment
<b>26800</b>	Manufacture of magnetic and optical media
<b>46439</b>	Wholesale of radio, television goods & electrical household appliances (other than records, tapes, CD's & video tapes and the equipment used for playing them)
<b>58210</b>	Publishing of computer games
<b>59111</b>	Motion picture production activities
<b>59112</b>	Video production activities
<b>59113</b>	Television programme production activities
<b>59120</b>	Motion picture, video and television programme post-production activities
<b>59131</b>	Motion picture distribution activities
<b>59132</b>	Video distribution activities
<b>59133</b>	Television programme distribution activities
<b>59140</b>	Motion picture projection activities
<b>59200</b>	Sound recording and music publishing activities
<b>60100</b>	Radio broadcasting
<b>60200</b>	Television programming and broadcasting activities
<b>62011</b>	Ready-made interactive leisure and entertainment software development
<b>73120</b>	Media representation services
<b>74202</b>	Other specialist photography
<b>74203</b>	Film processing
<b>74209</b>	Photographic activities not elsewhere classified
<b>77220</b>	Renting of video tapes and disks
<b>77291</b>	Renting and leasing of media entertainment equipment
<b>78101</b>	Motion picture, television and other theatrical casting activities
<b>90010</b>	Performing arts
<b>90020</b>	Support activities to performing arts
<b>90030</b>	Artistic creation
<b>90040</b>	Operation of arts facilities

*Figure 9: SIC codes used for Long Term Pattern. 2025.*

A person wearing a light-colored baseball cap and a dark t-shirt is shown in profile, looking down at a piece of equipment. The equipment includes a monitor displaying a video feed, a radio with an antenna, and a camera. The person's t-shirt has the letters "SON" visible on the sleeve. The background is a blurred outdoor setting with buildings. The entire image has a teal color cast.

**A video shoot  
taking place**

# THE WORKERS

## The Freelancer Crisis

Several organisations track workforce numbers across the screen industries, but creating a coherent measurement framework is genuinely difficult. The problem is that film and television production bleeds into advertising, video games and other sectors in ways that resist neat categorisation. The ONS Standard Industrial Classification codes are too blunt an instrument: they group together screen production with unrelated activities, and they cannot distinguish between different production types or identify whether something is a UK or international production. Some work gets coded to the wrong category entirely. The BFI's *Screen Business* reports (BFI, 2025) take a different approach, focusing on productions that qualify for UK tax relief schemes. This works reasonably well for scripted content, but it creates a significant blind spot: there is a substantial volume of UK production activity that does not qualify for tax relief and therefore becomes invisible in their data.

Some of the most methodologically progressive work has been conducted recently by ScreenSkills with Ampere (ScreenSkills, 2025), looking to expand the definition of the screen industries inclusively. Although this still excludes games and content creation, it offers relevant insights: 'The UK production market has been through a tumultuous half decade. COVID-19 disrupted production from 2020. Global streamers drove significant growth in commissioning activity in 2021 and 2022. 2023 and 2024 saw challenges in both the UK and global economy combined with the aftershocks of the Hollywood strikes. Such volatile market conditions create unpredictability, both for companies operating in the sector and for individuals looking to build their careers in the industry' (ScreenSkills, 2025).

ScreenSkills (2025) reports that London is the largest regional contributor to employment in the sector, responsible for an estimated 80,000 individuals. However, 60% of the UK's screen workforce is based outside London. The largest regional contributors are the South East of England (more than 20,000 individuals), Scotland and the North West of England (each responsible for 10,000–16,000). Workers in the UK regions are twice as likely to travel domestically for productions (53%) compared with London (26%) and the Nations (27%), highlighting local skills gaps (ScreenSkills, 2025).

Analysis of PAYE workers using The Data City CIC identified 166,233 workers in the nine West London boroughs (February 2026). This will not include large numbers of Tier 3 and 4 workers who are impossible to identify through The Data City and ONS data; for example, carpenters, caterers and logistics drivers who work almost exclusively in screen but whose SOC and SIC codes fall within 'non-creative industries'. The principal SOC code for identifying screen industries workers is 3413, 'Actors, entertainers and presenters'. This does not include workers in non-creative roles such as food technicians, painters, carpenters and drivers. SOC codes do not provide geographical detail, moreover. However, this is a robust and broader measurement that includes

companies which have not yet been picked up by The Data City RSICs or RTICs and are not self-reporting under SICs, but have been hand-added to the core list of companies.

How has this figure altered over time? PAYE data from the ABS tells us that employment in the 30 SIC codes underlying the 'convergent screen industries' is increasing, as the table below shows.

	2014	2019	% increase	2024	% increase
<b>9 West London Boroughs</b>	74,040	75,333	1.75%	83,180	10.42%
<b>London</b>	151,203	170,465	12.74%	200,443	17.59%
<b>UK</b>	321,583	360,285	12.03%	411,148	14.12%

Figure 10: Employment in 30 Convergent Screen SIC codes, 2025. Source: ABS, based on ONS IBDR

The fact that the percentage increases for West London are lower than for the rest of London and the UK does not mean that employment is rising at a lower rate, nor that businesses in West London are performing less well: it may mean that companies in West London are offloading employees onto freelance contracts to reduce overheads and survive economic challenges caused by Brexit, technological change, new competition and other global forces, including the impact of COVID-19 post-2019 and the subsequent Hollywood writers' and actors' strike. Freelance workers in a borough such as Hammersmith & Fulham are particularly exposed to this, as ITV, BBC Studios, Disney and Publicis have significantly shifted towards freelance contracting in recent years. Disproportionately resident in or around Hammersmith & Fulham, these workers face some of the highest housing costs in the cluster whilst losing employment security.

Anecdotal evidence from the interviews conducted for this report suggests that 'above the line' workers in high-end television and theatrical film tended to congregate residentially in Chiswick, Ealing and Hammersmith & Fulham from the 1980s onwards. These include writers, actors, producers, directors, cinematographers and editors. However, the generation of 'above the line' creative workers purchasing homes from the 2000s onwards tended to settle in the more fashionable areas of East London, particularly Hackney, a trend that continues. Below-the-line workers in Tiers 3 and 4 are more likely to live in the affordable suburbs closer to the studios. An example is Hillingdon, where workers clustered to provide goods and services for the large studios such as Pinewood. Sources such as BECTU, Creative PEC, ScreenSkills and the Film and TV Charity suggest that approximately half of all workers in the screen industries are self-employed, although other sources put this figure as low as a third. This variation is a symptom of the difficulty in obtaining accurate figures. However, this figure may be significantly higher when the hidden screen industries, new screen industries, and supply chain sectors are included.

## Contribution to West London's Overall Employment

The data presented in this report suggest that Oxford Economics has significantly undercounted the contribution of the screen industries to the West London economy by relying on outdated SIC and SOC codes that do not capture economic activity in the screen industries. Oxford Economics relies on 19 SIC codes in presenting data on employment in West London, as follows:

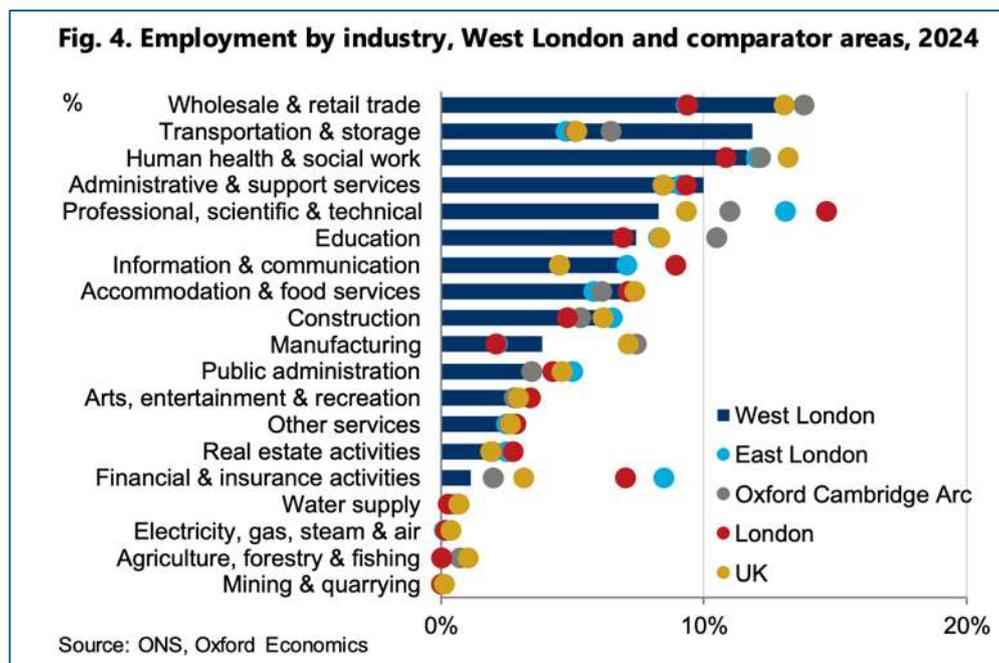


Figure 11: Oxford Economics Measures of West London Employment by Area, 2025.

The Oxford Economics figures therefore need to be interpreted with caution. By relying on a limited set of 19 SIC codes, they capture only those businesses that self-classify within narrowly defined industrial categories, omitting large parts of the screen supply chain that sit across advertising, music, games, digital content creation, logistics, construction, catering and other ‘non-creative’ codes. They also under-represent freelance, portfolio and micro-enterprise workers, many of whom are either coded elsewhere in SOC classifications or invisible within employer-based datasets. The analysis in this report drawing on PAYE data, expanded company identification through The Data City CIC, and qualitative sector mapping indicates that the actual number of people working in and for the screen industries in West London is likely to be significantly higher than the Oxford Economics estimates. In short, conventional industrial classifications struggle to capture the convergent, freelance-intensive and supply-chain-driven nature of contemporary screen production, leading to systematic undercounting of both employment and economic impact.

## Creative Workers: Methodological Challenges

The UK has relied on a high proportion of freelance workers since TV deregulation in the 1990s, providing flexibility but now exposing workers to extreme economic volatility. In the supply chains for advertising, music video and branded content, the majority of workers have been engaged on freelance contracts since the 1960s. Multiple official data sources recognise that the proportion of screen workers engaged on freelance and self-employed contracts is higher than the national average. Research undertaken for this report, based on the Labour Force Survey (LFS), shows that in 2024, 30% of workers in screen industries (excluding games, content creation and screen advertising) were freelance, compared with 13% nationally. Within London, the percentage rises to 32%. Unfortunately, LFS data is increasingly unreliable because response rates have fallen dramatically, creating known biases, and the Office for National Statistics advises that estimates should be ‘treated with additional caution’ (ONS, 2024). However, recent research by the University of Reading suggests that up to 50% of workers in film and television are freelance (Purse et al, 2024).

Measuring the creative workforce remains one of the most persistent methodological challenges in creative industries analysis. Portfolio careers, high rates of self-employment, and fragmented freelance working make creative workers inherently less visible in employer-based surveys, while structural mismatches between occupational (SOC) and industrial (SIC) classifications compound the problem: a video editor working in advertising is recorded differently from one performing identical work in broadcasting, distorting sector-level analysis. Industries such as music video production and screen advertising are particularly affected, spanning multiple SIC codes in ways that obscure their true scale. Micro-enterprises, sole traders, and experimental or community-based practices fall further below the radar of standard business surveys, despite often being sites of significant innovation. The policy implications are substantial: creative workers are systematically undercounted, their economic contributions undervalued, and their needs (including income volatility, skills development, and affordable workspace) poorly served by frameworks designed around conventional employment models.

Based on recent research and union reports, freelance workers in film and television face both an acute immediate crisis and longer-term structural challenges. In January 2025, the Economics Observatory reported BECTU data showing that 68% of freelance screen workers were not currently working, only a slight improvement on the 74% unemployment rate recorded during the 2023 Hollywood strikes (Barker and Ugur 2025). The University of Reading's *Screen Industry Voices* report found that experienced producers were selling their homes to survive financially; some freelancers had not found work for over a year; and many were working without basic benefits such as sick pay or holiday pay (Purse et al, 2024). Freelancers lack many protections enjoyed by employees, including sick pay, flexible working rights, parental leave and pensions. Many fell through gaps in COVID-19 support schemes, including furlough and the Self-Employment Income Support Scheme (SEISS). Freelance workers also face difficulties accessing Universal Credit due to assumptions about rapid job turnover. As production companies reduce budgets, there is evidence of illegal employment practices,

individuals being promoted prematurely due to the loss of experienced staff, and the exploitation of cheaper, underqualified workers.

While the games industry is largely concentrated outside London, West London nonetheless hosts a significant games cluster. The games sector also exhibits a shift towards freelance employment. In its 2025 report, TIGA showed that the UK games development workforce reached 28,516 people by May 2024 (25,419 full-time equivalent roles plus 3,625 freelancers) representing year-on-year growth of 4.8%, the slowest since 2012, but still growth at a time when the global industry was contracting (TIGA, 2025). However, this aggregate figure masks significant volatility: 400 companies shed 2,353 full-time jobs; 678 companies added 3,932 jobs; and 248 companies (10.4%) shut down entirely. Most notably, there was a substantial surge in freelance labour: freelancer numbers more than tripled, from 1,102 to 3,625, as larger companies reduced permanent staff (TIGA, 2025). TIGA's research also indicated a structural shift in ownership patterns: overseas-owned studios now employ 62% of the UK workforce (12,743 staff), compared with 7,854 employed by domestically owned studios. Large console studios (41–149 staff) grew fastest at 19%, while start-ups declined sharply (166 new studios compared with 251 previously).

## Freelance Risks

Whilst offloading PAYE workers to freelance contracts is a method used in creative industries for companies to protect their assets, networks and survival during economic downturns, if it occurs without the appropriate and necessary regional infrastructure to support freelance workers, it can cause serious economic and social problems. The Film and TV Charity have developed infrastructure to provide some of the support necessary for the rise in freelancers. The Film and TV Charity define a freelancer as anyone engaged on fixed-term projects, including PAYE, sole traders, or those using personal service companies. The question remains whether the industry should enforce a levy on commissioners, particularly overseas commissioners, to finance such an infrastructure. Freelance workers do not benefit from HR departmental support. The Film and TV Charity's *Money Matters* research revealed that 42% of film and TV professionals had less than £1,000 in cash savings, including 27% who had no cash savings at all (Film and TV Charity, 2024). Ryder stated that workers are 'asked to navigate an industry prone to boom-and-bust cycles...without any of the safety nets afforded to other workers, despite being at the heart of a multi-billion-pound pillar of the UK economy' (Film and TV Charity 2024).

Representation of freelance workers in the main unions is poor. BECTU (Broadcasting, Entertainment, Communications and Theatre Union) is the main union for behind-the-scenes staff and freelancers in film, TV, and cinema, and holds a membership of 40,000–60,000 workers (approximately 25% of film and television workers as defined by ScreenSkills 2025). It has specific branches for different sectors, including Art Department, Camera, Post-Production, and Hair & Make-up. BECTU has made several public statements highlighting how underrepresentation and inequality disproportionately affect freelance workers, and has consistently highlighted the lack of representation of freelance workers as a public policy priority. Its most prominent recent

statement came in its February 2024 survey of over 4,000 UK film and TV workers (BECTU, 2024). This survey showed that 40% of female respondents said they see themselves in another industry in five years' time compared to 34% of men, and while 37% of white respondents see themselves leaving the industry, 50% of Black respondents said they would leave in the next five years. Head of BECTU Philippa Childs called on the Department for Culture, Media and Sport to convene an urgent industry summit, arguing that the cyclical boom-and-bust nature of the sector was having a disproportionate impact on women and BAME workers (Clarke, 2024).

Union representation remains a weakness in other sectors. Online content creators have only recently begun to mobilise. The Creator Union (UK), founded in 2020 by Nicole Ocran, is a trade union specifically for influencers and digital content creators working across platforms such as YouTube, TikTok, and Instagram (Lewis Silkin 2020). It focuses on fair compensation, equitable contracts, negotiation support, and addressing pay gaps between different ethnicities and genders. In the UK, IWGB Game Workers (the Game Workers branch of the Independent Workers Union of Great Britain) is the largest and main union for UK game workers, representing over 1,500 workers covering direct employees, contractors and freelancers (IWGB Game Workers 2024). The union recently achieved the UK's first recognised collective bargaining agreement in the games industry, at ZA/UM studio. The union reports that 74% of game workers are not paid overtime, but 90% can be expected to work extra hours, and 53% believe that their skillset could secure better wages and conditions in another industry. The union is actively campaigning against 'crunch culture', job insecurity, and unpaid overtime, with its manifesto calling for four-day working weeks, an end to the gender pay gap, and stronger worker protections.

## **Focus: Content Creators**

Content creators act in a similar way to production companies. They generate concepts for screen content and hire suppliers such as film studios, camera and lighting companies, and make-up artists to produce content for platforms such as YouTube, TikTok and Instagram. Although it was not possible to collect data on them for this report, content creators for digital platforms represent a distinct sector within the UK screen industries, encompassing both influencers who build personal brands and educational or informative producers who develop expertise-based programming. They are likely to constitute a significant workforce in West London, for which further research should be commissioned.

Unlike traditional screen content production, digital content creators typically operate as individual entrepreneurs or small teams, producing, editing, distributing and marketing their own content without the intermediary layers of production companies, post-production facilities or traditional broadcasters. This radically compressed supply chain means creators must develop competencies across technical production, audience development and business management, effectively serving simultaneously as creative directors, editors, distributors and revenue managers.

Unlike in the film and television supply chain, which is structured around commissioners, production companies, distributors and layered recoupment models, social media creators often retain their IP and monetise content immediately through platform infrastructure. YouTube and Instagram creators retain copyright ownership of their original work, which fundamentally distinguishes them from traditional TV and film producers who typically work under work-for-hire arrangements in which broadcasters or production companies own the intellectual property. Revenue flows are therefore more direct, data-driven and individualised, bypassing many of the intermediary tiers that characterise traditional screen industries. This model gives individual creators both ownership and distribution control over their work, while allowing platforms extensive usage rights for the duration that content remains on the platform, a hybrid arrangement that differs significantly from the complete copyright transfer more typical in traditional screen industries.

Several organisations have attempted to measure UK content creators, though methodological challenges mean estimates vary substantially. Adobe's 2022 *Future of Creativity* study, conducted with Edelman Data & Intelligence, estimated approximately 16.5 million UK content creators (roughly 25% of the population) representing growth of 8 million creators since 2020 (Adobe/Edelman, 2022). However, its definition of 'creator' is exceptionally broad, encompassing anyone who participates in creative activities and posts, shares or promotes their work online at least monthly with the goal of growing their social presence. This includes hobbyists alongside professionals, with 65% of UK creators remaining employed full-time in other occupations. A 2024 survey by content marketing agency FATJOE found that one in two Britons aged 20–54 identifies as a content creator, translating to approximately 13 million people, broken down into podcasters (17.2%), bloggers (23.0%) and social media content creators (12.2%) (FATJOE, 2024). The Oxford Economics' impact report, focused more narrowly on monetised YouTube creators, found that they contributed £2.2 billion to UK GDP and supported 45,000 jobs, a more restrictive definition capturing professional creators generating substantial economic activity (Oxford Economics, 2025b).

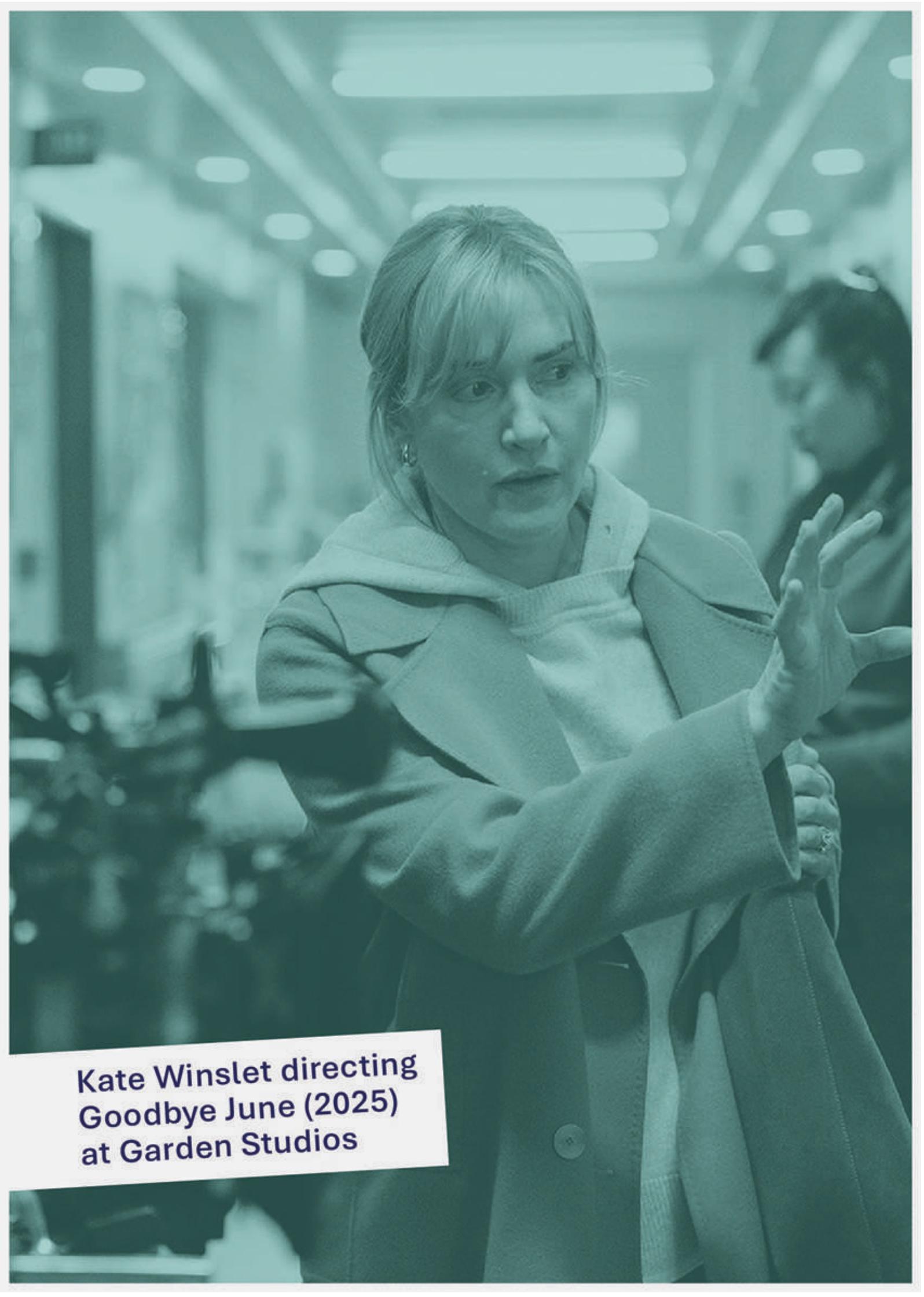
The definitional problem creates severe measurement challenges. When the Office for National Statistics (ONS) received a Freedom of Information request about influencer numbers, it acknowledged that 'influencers do not fit easily into one category within SOC 2010 (Standard Occupation Classification),' explaining that, depending on what individuals actually do or how they self-identify, they could be classified across multiple occupational categories (ONS, 2023). This reflects a fundamental difficulty: content creation is not recognised as a distinct occupation in traditional labour market statistics. Creators may instead be categorised as photographers, writers, entertainers, marketing professionals or self-employed workers across various classifications. The lack of standardised industrial or occupational categories means no authoritative government statistics exist tracking this workforce, despite its growing economic significance, a gap that contributed to the formation of an All-Party Parliamentary Group for Content Creators (APPG for Content Creators, 2025).

## Skills: The Issues

The skills issue is particularly complex, with different reports highlighting often conflicting trends. A consistent finding from the interviews and reports is that employers find it difficult to predict long-term what skills are needed and tended to recruit on a short-term, project-by-project basis. As attention turned to digital and AI, much focused discussion on new tech skills led to the neglect of traditional screen skills in physical production such as carpentry, wardrobe and transportation. Despite the uptake in virtual production and fears about the decline of such traditional skills due to AI, qualitative research suggests there was an increase during the latter part of 2024 in traditional skills. Virtual production has not developed as was predicted in 2022 as a system of production for entire projects, but rather as a system for the filming of inserts, particularly for car commercials or car special effects (SFX), to be inserted into larger physically crafted live-action film productions. This is typical in a period of intense experimentation with new technologies. In the 1970s and 1980s, when videotape was first introduced, it was more than three decades before the industry settled down around a new institutionalised workflow based on that technology (Caston, 2024c).

It is recommended that WLB undertakes a separate and thorough investigation into skills, paying close attention to portfolio careers, older workers, regional variations and apprenticeships. The Film and TV Charity's 2022 research indicated that the UK film and TV industry could have 24,000- 35,000 more skilled workers if it improved retention of older, experienced staff (Film and TV Charity, 2022). ScreenSkills (2025) reported that skills needs vary regionally. The South West workforce faces particular retention issues stemming from low demand for unscripted projects, as does Scotland. London is seeing pressure on VFX and craft roles, alongside ongoing post-production skills needs. The North East, North West and Yorkshire have a proportionally greater need for upskilling of workers in technical roles, as does the Midlands. Producers in the Regions and Nations also face different Diversity, Equity and Inclusion (DEI) challenges to those in London, potentially requiring producers to trade hiring locally off against widening their geographic recruiting pool to support the recruitment of diverse talent. ScreenSkills argues that clear, centralised DEI guidance, tailored to each area, would help producers across the UK balance DEI goals with local hiring initiatives.

Apprenticeship opportunities are lacking, and this is partly due to the structure of the screen industries, composed of SMEs rather than large companies with the resources to fund in-house training schemes. ScreenSkills (2025) noted that 'Role-specific skills training is an area of high demand among workers, but industry interviews now highlight the limited on-the-job training opportunities for new entrants. This compounds the challenges for those new to the workforce. The limited number of new roles has driven high competition among the workforce for these roles, and limited training opportunities means that new entrants struggle to demonstrate to employers that they have the skills necessary for those positions.' (ScreenSkills, 2025).

A teal-tinted photograph of actress Kate Winslet on a film set. She is wearing a light-colored hooded sweater under a dark, heavy coat. Her hair is pulled back, and she has a focused, serious expression. Her hands are raised in front of her, gesturing as if giving directions. The background is a busy studio environment with bright overhead lights and blurred figures of other people.

**Kate Winslet directing  
Goodbye June (2025)  
at Garden Studios**

# STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

## Strengths

West London's skilled labour force is its primary strength. Alfred Marshall's concept of industrial districts offers a compelling framework for understanding West London's screen industries labour market. Marshall argued that when specialised industries cluster geographically, they create what he famously called 'industrial atmosphere,' a concentration of skilled workers whose knowledge is, as he put it, 'in the air.' This perfectly captures how West London's predominantly freelance creative workforce operates: geographic proximity around studios enables continuous informal knowledge exchange through chance encounters, crew recommendations, and movement between projects. The district becomes self-sustaining precisely because it is freelance-based rather than tied to single employers. Experienced practitioners mentor newcomers on set, skills transfer laterally through crew networks, and specialised subsidiary services cluster to support production needs. Marshall recognised that such districts develop their own mechanisms for skill reproduction outside formal institutions: workers learn through observation, practice, and peer teaching rather than solely through formal training. In West London's case, this creates what Marshall would have recognised as a powerful competitive advantage: a deep pool of multi-skilled labour that collectively maintains cutting-edge expertise, adapts rapidly to technological change, and reproduces its own knowledge base through embedded social and professional networks. The freelance structure, rather than fragmenting this ecosystem, actually strengthens it by ensuring constant cross-pollination of skills and practices across projects and companies.

This ecosystem of labour means that when a new tax incentive triggers an increase in investment opportunities and industrial expansion, West London has the capacity to support that. The UK's Independent Film Tax Credit (IFTC), officially launched in April 2025, is a case in point. The credit offers a 53% gross credit (39.75% net after corporation tax) for films with budgets up to £15 million, significantly higher than the standard 25.5% rate. To qualify, films must be intended for theatrical release and meet at least one of three criteria: have a UK lead writer, a UK lead director, or be certified as an official UK co-production. It is designed explicitly to match Ireland's 40% rate for independent films and keep the UK competitive in this crucial sector. Early evidence suggests it is working. The most telling indicator comes from BFI certification data: in the first six months of 2025, 417 films under £20m applied for BFI certification, compared to 328 in the same period of 2024, a significant 27% increase (BFI, 2025). More granular monthly data shows the effect timing: applications jumped from 36 in September 2024 (pre-announcement) to 59 in November 2024 (just after the October green light), then climbed to 86 in April 2025. Industry sentiment is notably positive: the BFI reported 'a lot of positivity in the industry' and 'a growing sense of confidence around domestic production' (BFI, 2025), while producers are actively incorporating the IFTC into financing plans. The studio head of one of Park Royal's studios reported that the indie tax relief was definitely taking effect, citing seven to eight independent feature films in development. This tax credit has a

potentially powerful impact on the skills pipeline because it expands the opportunities not only for new entrants but provides opportunities for crew to take a step up the career ladder into a more senior role, something unlikely on a risk-averse large US production.

Another strength is West London's advanced ecosystem. In the US model of film and television production, films were made at large studios with in-house catering. That is not how West London evolved as an industrial district serving the screen industries, as the following account from a West London studio manager illustrates:

*'We don't have onsite caterers. When we built the studio, we talked to loads of people and visited other studios, and almost everyone said the same thing: the problem with having permanent onsite catering is that when there's no business, they've got nothing to do but you still have to pay them. Plus the equipment and maintenance costs a lot. So what we did was partner with lots of local suppliers. We thought about partnering with just one but decided that wasn't the way either, because not everyone likes the same thing. We partnered with about six companies and offer them all to our clients. We say, 'Please choose one of these to work with.' They've all worked here before, they all know how to work in this space, and they're all checked for sustainability, sourcing, and seasonal cooking. They all know that when you come here, you don't bring plastic forks or any of that. We've done all our checks, and we just say, 'You choose one.' There's a variety of budget levels, some really high-end, some more mid-range, but all the food is really good. We've tested it all, obviously. That's how we operate. They come in and work however clients want to work. If you want a hot box, no problem. If you want full service, we'll figure out how to manage that.'*

An area in which that ecosystem is extraordinarily well-developed is Park Royal, with a high concentration of film and photographic studios such as RD Studios and Garden Studios, props houses such as Superhire, SFX companies such as Machine Room, and lighting and camera equipment hire companies. One studio head spoke of the difficulties when an outside player tries to disrupt the local ecosystem:

*'Recently, a job came in that was simply too small for us. The production really needed a much smaller space, so our studio wasn't the right fit. Rather than turning them away entirely, I referred them to a nearby studio which is more photography-focused, although they also work with music and related projects. They're very close to us and genuinely lovely to work with. For me, it's important, where possible, to keep business within the local area so that work continues to circulate locally and supports the wider creative ecosystem. I think that kind of approach really matters.'*

The studio head praised the role of Reel Park Royal and of another studio in particular for facilitating networking and engagement events. They explained that they had sent their new business lead to visit the other companies in the district:

*'It's important to understand what other organisations in the area offer, so that when people refer to them, you're informed and able to speak knowledgeably. In fact, over the past few weeks, he's been visiting all of the West London studios for exactly the same reason. If you want to build meaningful relationships, you have to reach out, meet people, and talk to them. What's particularly interesting to me is the role of verbal agreements rather than written ones. I think that's highly significant. Verbal agreements are often stronger precisely because they are human: they're about relationships and trust. Once something is formalised on paper, it starts to imply lawyers, contracts, and courts, and that changes the nature of the relationship. This approach is also rooted in our history. For example, among rental houses, lighting, grip, and related services, there is a shared, unwritten understanding of inter-company rates. If one company is sub-hiring equipment from another for a set number of days, everyone knows what the percentage discount will be. It's never written down, but everyone understands it, and everyone honours it. It operates very much as a gentleman's agreement, and it works because it's built on mutual trust.'*

This dynamic closely reflects Michael Porter's influential theory of industrial clusters, developed in his seminal work *The Competitive Advantage of Nations* (1990) and elaborated in subsequent research. Porter argued that geographic concentrations of interconnected companies, specialist suppliers, service providers, and associated institutions generate competitive advantages that no single firm could achieve in isolation. Crucially, Porter identified that clusters foster a paradox: firms in direct competition with one another simultaneously collaborate, sharing knowledge, infrastructure, and informal norms in ways that raise productivity and stimulate innovation across the whole district. The West London screen industries ecosystem exemplifies this dynamic. The concentration of studios, props houses, SFX companies, and equipment hire firms in areas such as Park Royal generates what Porter termed 'spillover effects:' the informal circulation of knowledge, referrals, and trust that reduces transaction costs and sustains the cluster as a whole. The studio manager's account of unwritten inter-company discount rates operating on mutual trust is a particularly vivid illustration of what Porter described as the role of social capital and repeated interaction in lowering the frictions that would otherwise impede collaboration between competitors. Porter also emphasised the importance of local rivalry as a driver of improvement: firms push one another to innovate and perform precisely because they share the same geography and client base. Far from undermining the cluster, competition and cooperation coexist and reinforce each other, a dynamic that formal policy frameworks, with their emphasis on individual firm support, often struggle to recognise or replicate.

One studio manager described a recent example of an outside company entering the local ecosystem whose operating model stood in sharp contrast to the collaborative norms described above. The company in question is a large, internationally-backed conglomerate with origins outside the screen industries entirely, having diversified into studio and equipment hire as a strategic investment decision rather than through organic sector experience. Its approach to market entry has been aggressively acquisitive: by leveraging substantial financial reserves, it is able to undercut established independent suppliers by significant margins, in some reported cases offering rates so far below market value that they are commercially unsustainable for any business without equivalent backing. The apparent intention is to secure contracts at a loss, drive independent competitors out of business, and then acquire those businesses at distressed prices. This pattern, the studio manager suggested, had already repeated itself several times within the sector. The broader concern was clear: if that practice was permitted to continue unchecked, the independent ecosystem that underpins the cluster, and the competitive, innovative culture it sustains, could be progressively eroded, with higher prices and reduced choice the inevitable long-term consequence.

The third most important strength is West London's transport connections, which provide ease of access to Heathrow for inward investment and exports, speed of access to London's financial and legal centre as well as the VFX, commissioning and advertising clusters in Westminster, and affordable public transport links to East London's fashionable residential districts for London workers. One studio manager explains:

*'We do a lot of EPKs (Electronic Press Kits) here, and I think that's largely because of our location. We're in West London, so we're easy to get to from Heathrow and central London. Talent doesn't really want to be in Reading or wherever, they want to be in the centre of town, staying in the smart hotels and all the rest of it. Talent doesn't like to travel, really. And these days they seem to be getting more and more restrictive. They're like, 'Oh no, I can only travel 20 minutes from my house.' And I'm like, 'Well, okay, great, but we're actually about 20 minutes from Knightsbridge, Kensington, all those places where there's quite a lot of talent living anyway.'*

A trade representative added: 'If you're filming in London, there's access to a wide variety of locations within short travel distance of the studios. You can avoid location overnights for the crew, and you can hire crew locally even if you're not hiring from London specifically. That's a big appeal as well.'

The Elizabeth Line, connecting the outer West London boroughs to the inner West London boroughs and through into Canary Wharf and Stratford, plays no small part in this and represents not only a strength but an ongoing opportunity. Specifically, it connects West London to Canary Wharf and Stratford. In doing so, it renews Marshall's insight that economies depend less on co-location than on infrastructural proximity, updating the underground-era screen ecology for a platform-led, hybrid, and globally networked production system.

## Weaknesses

The West London Convergent Screen Cluster fundamentally depends on geographic proximity and face-to-face interaction, precisely what is now under threat. As housing costs escalate in West London, the skilled workforce that sustains this ecosystem is being pushed further from production hubs, lengthening commutes and weakening the informal networks through which knowledge circulates. Equally critical is the erosion of communal spaces: affordable cafés, pubs, shared workspaces, and informal gathering spots where freelancers between projects would traditionally meet, exchange information, hear about opportunities, and mentor emerging practitioners. Marshall understood that industrial districts thrive on what he called 'the mysteries of the trade' becoming 'no mysteries; but are as it were in the air' (Marshall, 1890) yet this atmospheric transmission requires physical co-presence and repeated casual interaction. When workers cannot afford to live within the district or lack accessible third spaces in which to congregate, the tacit knowledge flows fragment, career pathways become opaque to newcomers, and the self-reproducing character of the skilled labour pool begins to break down. The district's competitive advantage erodes not through any single catastrophic event, but through the gradual dissolution of the social infrastructure that enables collective learning and mutual support.

Whilst the enhanced Audio-Visual Expenditure Credit (AVEC) represents a significant opportunity for the cluster given its exceptional specialised labour force, studio infrastructure, and supply chain density, West London is not currently positioned to take maximum advantage of either instrument without structural adjustments to its cost base where weakness presently exists. Two areas warrant particular attention. The first is the cost of film permits across the cluster's boroughs. Screen policy discussion tends to focus heavily on studio capacity; insufficient attention is paid to West London's considerable value as a filming location in its own right, offering producers direct access to one of the world's deepest screen talent pools. That locational advantage is being actively undermined by permit fee structures that are materially uncompetitive against those in the Midlands and the North. Across a range of local authorities in Greater Manchester and West Yorkshire, standard permits for mid-sized crews typically fall in the range of £80–£150, reflecting a deliberate policy of using competitive fee-setting as an economic development tool for their screen sectors. Equivalent fees across several West London boroughs can exceed this by a factor of four or more, once application charges, park hire, and ancillary costs are included. A co-ordinated reduction in permit fees across the cluster's boroughs targeted specifically at qualifying productions would meaningfully strengthen West London's competitive position for the independent productions the new credit is now attracting.

The second consideration is the pricing structures of the cluster's equipment and facilities suppliers. Camera rental houses, lighting companies, and post-production facilities are concentrated across West London at a density that no regional competitor can match. By offering structured discounts to productions qualifying under the enhanced AVEC, these businesses would be well-placed to actively anchor productions within the cluster, converting a tax credit designed to attract inward investment to the UK into direct local economic activity across the cluster's boroughs. Without this kind of co-

ordinated commercial response, production spend will continue to follow the lowest permit fees northward, and the cluster will remain a net exporter of opportunity to regions with more aggressively incentivised screen economies.

Another issue of concern is sustainable energy sources for the cluster. Several West London boroughs are already approaching or at grid capacity, placing significant strain on the electrical infrastructure serving the cluster's studios and production facilities. This has material consequences for the cluster's long-term operational resilience. Energy consumption is also an increasingly prominent reputational concern. BAFTA albert, the screen industry's leading sustainability certification body, provides a carbon calculator and certification scheme that enables productions to measure, reduce and offset their environmental impact. While a number of studios and production companies within the cluster have adopted albert certification, uptake remains uneven, and albert's framework has been designed primarily around film and television, leaving significant parts of the West London screen economy including screen advertising production, music video, branded content, and immersive production without an equivalent sustainability pathway.

West London's screen industries would benefit from increased support for micro and small businesses, freelance workers and skills development. Prohibitive business rates were raised by everyone interviewed. The 2023 revaluation by the Valuation Office Agency (VOA) saw film studios' rateable values increase by as much as 600%, far exceeding increases in other sectors. The British Film Commission quickly established a working group of business rates specialists and engaged in negotiations with the VOA resulting in the introduction of a 40% business rates relief for film studios in England, backdated to 1 April 2024 and lasting until 2034. The problem is that this applies only to the very largest film studios. The vast majority of film studios examined for this report do not qualify for the 40% business rates relief and operate with unsustainable rates. Those studios that do qualify experience cash flow problems because the rates are paid up front and the discount is claimed retrospectively.

The closure of tax relief schemes was identified as a significant weakness by a leading British film producer based in West London. The Enterprise Investment Scheme (EIS) was a UK tax relief scheme introduced in 1994 that became a major source of private financing for British independent film production, particularly from the late 1990s through the mid-2010s. EIS had been controversial, particularly after high-profile disputes with schemes like Ingenious Media. In 2018, new 'risk to capital' conditions were introduced that fundamentally changed EIS eligibility. One leading British film producer stated (Interview, 2025):

*'The government, the Treasury, went after those tax schemes so aggressively, and these were all tax schemes that had been approved by the Treasury itself. But the way they turned on them and went after the film industry really gave it a terrible reputation. It gave people the impression they were being sold dodgy goods when they weren't, they were being sold things that were perfectly legitimate at the time. The UK is very vulnerable because of its dependence on the USA. At the*

*moment we're absolutely the busiest production hub in the world, which is fantastic, but a stroke of Donald Trump's pen could take a lot of that away. And if you don't look after the whole ecosystem, you're creating huge risk. Distribution is key to protecting the ecosystem. Distributors are having a very tough time at the moment, and I don't know exactly how one could support them, but that would be an interesting question. For example, if they could claim the tax credit on their prints and advertising (P&A) spend... I think it's about recognising the enormous risk: basically, each film is like setting up a new business.'*

The collapse of linear TV and the advertising model for funding television production, which coincided with the development of subscription-based television, has been a significant weakness. The traditional advertising-funded television model that sustained ITV and Channel 4 for decades is in structural decline, forcing both broadcasters into painful transitions. In 2023, Channel 4's linear advertising revenue collapsed by 16% - described by its COO as the 'steepest decline since the financial crisis of 2008' (Channel 4, 2023) - while total revenues fell 10% to £1.02 billion, resulting in the broadcaster's largest-ever deficit of £52 million (Channel 4, 2023). ITV faced similar pressures, with total advertising revenue essentially flat despite digital growth, as viewers fragmented across streaming platforms and advertisers followed audiences to digital channels (ITV, 2024). Both broadcasters are racing to pivot: Channel 4 reached a 'crossover point' between linear and digital viewing in 2024, with digital advertising revenue hitting 30% of total revenues - double the market average (Channel 4, 2024) - while ITV's ITVX platform saw streaming hours up 12% and digital advertising revenue growing 15% (ITV, 2024). Yet this digital growth has not compensated for linear losses: digital CPMs and total revenues remain substantially lower than traditional broadcast advertising commanded. The crisis has forced fundamental restructuring: ITV delivered £60 million in cost savings in 2024 (ITV, 2024), while Channel 4, following the 2024 Media Act's removal of the publisher-broadcaster restriction, announced plans to move into in-house production to diversify revenue streams beyond advertising. The underlying issue is that the advertiser-supported PSB model was predicated on mass audiences and limited channel choice, conditions that no longer exist in a fragmented, on-demand streaming environment where global platforms such as Netflix, YouTube, and Amazon compete for the same viewers but operate on fundamentally different economic models. This led to a decline in commissioning budgets for legacy media, the BBC, Channel 4 and ITV, based in West London, and that fall in budgets was passed on to the producers.

Failing to act quickly with tax incentives is another weakness. From 1 January 2025, the tax rebate on VFX expenditure was significantly increased and is exempt from the overall 80% cap on total budget eligible for UK tax relief. The UK's enhanced VFX tax relief, which came into effect on 1 January 2025, was specifically designed to stop visual effects work migrating to Canada, Australia, and India by addressing a critical structural flaw in the previous system: the 80% cap on qualifying expenditure meant that VFX-heavy productions would 'cap out' of available rebate, creating a perverse incentive to shoot in the UK but send post-production work to territories with better VFX-specific incentives. The new relief increases the VFX tax credit from 34% to 39% gross (29.25% net) and crucially removes the 80% cap entirely for VFX costs, allowing productions to claim

competitive relief on both shooting and VFX work in the UK, particularly important for Marvel/Netflix/Amazon-style tentpole productions that are extremely VFX-heavy. The BFI and sector had long campaigned for this change, and industry response was enthusiastic, with companies such as Framestore, BlueBolt, and Vine FX welcoming what UK Screen Alliance CEO Neil Hatton called an incentive that would bring 'many millions of dollars of inward investment work' to the UK's VFX community (UK Screen Alliance, 2024a). UK Screen Alliance estimates project an additional £175 million per year in UK VFX spending, a 45% increase, and 2,800 new jobs (UK Screen Alliance, 2024b), though definitive impact data will not emerge until late 2026 or 2027, since claims can only be made at the completion period and most VFX-heavy productions take 18 months to three years from start to finish.

However, just weeks after the enhanced VFX tax relief came into effect in January 2025, Technicolor Group - which owned *The Mill* (founded in London 1990, Oscar winner for *Gladiator*, 2001) and MPC (Oscar winner for *Life of Pi*, *The Jungle Book*, and *1917*) - collapsed completely. On 24 February 2025, Technicolor Creative Studios UK went into administration, immediately ceasing operations and making more than 440 UK staff redundant. The US operations shut down the same day. This has been compared to the Rhythm & Hues bankruptcy over a decade ago as one of the most significant shake-ups in VFX industry history. Despite significant annual revenue and decades of award-winning work, Technicolor cited 'severe financial challenges' stemming from post-COVID recovery, costly separation from its parent company, and, critically, the 2023 writers' strike, which caused a prolonged slowdown in customer orders and 'severe cash flow pressures.' The company attempted restructuring, sought investors, and explored acquisitions, but found no viable path forward. An October 2024 *Financial Times* report suggested Technicolor had remained 'too focused on mainstream filmmaking while the most reliable revenue was shifting toward streaming platforms' (Andreeva, 2025b). The enhanced VFX tax relief was specifically designed to stop VFX work migrating abroad by making the UK more competitive. It came into effect in January 2025. *The Mill* and MPC collapsed in February 2025. The tax relief arguably could not save two of the UK's most historic VFX companies because their problems were not fundamentally about tax competitiveness: they were about business model failure, cash flow crisis, and structural instability.

## Opportunities

Working with well-established and innovative partners in prestige heritage, the Golden Mile London creative tech innovation district presents a strategic opportunity to consolidate West London's position as a significant screen production hub by addressing critical infrastructure gaps that currently fragment the region's creative economy. Unlike established clusters in East London or Soho, West London's screen industries lack the dense network of supporting services and accessible workspace that enables spontaneous collaboration and knowledge exchange. The model developed by 180 Studios that is being brought to the Gillette Building on Golden Mile London offers exactly the opportunity needed. A mixed-use development could integrate purpose-built production spaces, post-production facilities, and flexible workspace alongside residential and commercial elements, creating the kind of creative ecosystem where

freelance crews, emerging production companies, and established players can co-locate. This is particularly timely given the High Speed Rail developments improving connectivity to both central London and the UK's growing regional production centres, positioning West London as a potential bridge between metropolitan and distributed production models. The key is ensuring any development recognises screen production's specific spatial requirements, sound isolation, high ceilings, loading access, fibre connectivity, rather than simply assuming generic 'creative workspace' will suffice, a mistake that has undermined several London developments attempting to attract media tenants.

Golden Mile London's Art Deco architecture represents an underutilised strategic asset for attracting US screen industry investment, particularly given US companies' demonstrated preference for heritage-led creative developments, Apple's commitment to Battersea Power Station being the most prominent recent example. The presence of JC Decaux's striking building, alongside network facilitators such as Brompton Technology and 180 Studios, suggests the beginnings of an ecosystem that could be deliberately strengthened rather than built from scratch. US clients in particular value the cultural capital of working in architecturally significant buildings, associating them with creative authenticity and brand prestige in ways that purpose-built modern facilities struggle to replicate. This creates a genuine competitive advantage over the standard industrial shed conversions that dominate much of London's studio expansion, or the bland new-build 'creative quarters' that lack distinctive character. The challenge is ensuring any development strategy recognises these buildings as functional production assets rather than just aesthetic backdrops, meaning preservation must accommodate the technical requirements of contemporary screen production (soundproofing, loading access, high-capacity power and data infrastructure) while maintaining the architectural integrity that makes them attractive to high-value international clients. If handled well, Golden Mile London could position itself as West London's answer to Shoreditch's Old Street cluster, but with heritage architecture that appeals specifically to the premium end of the market where US streaming platforms and tech companies are actively investing.

The proposed West London Orbital (WLO) represents one of the most significant infrastructure opportunities for the convergent screen cluster in a generation. A new London Overground line designed to run approximately eleven miles from Hendon and Brent Cross in the north to Hounslow in the south (via Neasden, Harlesden, Old Oak Common, Acton, and Brentford) the WLO would make use of existing but underused freight lines to provide the first direct orbital rail link between the cluster's principal nodes. Crucially, it would connect the Great West Road broadcast and screen corridor in Hounslow northward through the Ealing, Acton, and Park Royal creative cluster and into Brent, without requiring passengers to travel into central London and back out. In March 2026, TfL, the London Boroughs of Hounslow, Ealing, Brent and Barnet, and the Old Oak and Park Royal Development Corporation jointly committed £6.65 million to progress the scheme into detailed design, operational modelling and public consultation, with a decision on statutory approval expected in 2027 and services potentially beginning in the early-to-mid 2030s (Transport for London, 2026).

For the West London screen cluster, the WLO would be structurally transformative. The orbital route would enable film crews, editors, VFX artists and production staff to reach multiple West London facilities without the current necessity of travelling into central London first, cutting journey times between locations such as Harlesden and Brent Cross from hours to minutes. This matters enormously for an industry built on short-term, project-based employment, where a freelancer might work at Ealing Studios one week and a Hounslow post-production facility the next. The WLO would also bring an additional half a million people within one hour of Old Oak Common, dramatically expanding the labour catchment area precisely as that location emerges as a major HS2 interchange hub. At Old Oak Common, the WLO would connect directly with HS2, the Elizabeth line, Thameslink, and the Jubilee and Bakerloo lines, creating a genuine multimodal interchange that could position West London as a strategic production centre between metropolitan London and the UK's expanding regional production hubs. By linking nodes that are currently isolated from one another by public transport, the WLO would enable the fluid labour mobility and inter-node collaboration across the north-south axis that the Elizabeth Line already provides on the east-west axis, deepening the functional integration of the cluster as a whole, and turning what are presently fragmented assets into a coherent, competitive, and fully connected creative district.

The demise of subscription-based television and the revival of advertising-funded screen content present significant opportunities for West London's screen industries. Paradoxically, advertising is experiencing a resurgence as a funding model precisely as traditional ad-funded broadcasters decline, with Netflix and Amazon Prime introducing lower-cost ad-supported subscription tiers that are proving remarkably successful. Faced with 'subscription fatigue' (UK households plateaued at around 68% subscribing to any streaming service, with cost cited as the primary reason for cancellations) viewers are increasingly opting for cheaper ad-supported options (Ofcom, 2025). In the UK, Netflix's ad tier reached 28% of subscribers by Q1 2025, up from just 13% a year earlier (Ofcom, 2025); Disney+'s ad tier more than tripled to 23% (Ofcom, 2025); and Prime Video maintained 82% of users on its ad-supported option (BARB, 2025a). By Q3 2025, BARB data confirmed that ad-tier uptake across the three major platforms had reached substantial scale: Netflix's ad tier stood at 6.1 million UK homes (35% of its subscribers), Prime Video's ad tier at 11.8 million homes (87% of its subscribers), and Disney+'s ad tier at approximately 3 million homes (BARB, 2025b). This contributed to overall TV advertising revenue, including streaming platforms, returning to growth at £5.27 billion in 2024, up 3.8% (Thinkbox, 2025). This renaissance affords significant opportunities for West London's screen advertising production sector, a cluster historically concentrated around Soho, Kensal Rise, and Ladbroke Grove and represented by the Advertising Producers' Association (APA), which operates from Soho offices. The sector, which had faced structural decline as linear TV advertising collapsed, now confronts renewed demand as streaming giants scale their advertising businesses: Netflix alone doubled its ad revenue in 2024 and more than doubled it again in 2025 (Netflix, 2025), while generating growing demand for the high-quality, premium commercial content that London's production companies have traditionally specialised in producing.

An important opportunity is to build on the achievements of so many of West London's screen industries in investing in talent pipelines. Many, such as JCDecaux, run existing internal training and apprenticeship schemes. Others, such as the studios, run ventures for junior and new talent working on small or non-existent budgets. One studio has ten universities working on site, including Met Film, NFTS, and the Royal College of Art. MARS Academy is a virtual production training initiative based at MARS Volume in Ruislip, West London, launched in 2022 by Bild Studios in response to the growing skills shortage in virtual production and LED stage technology for film and television. The academy operates out of a 12,000 square foot, state-of-the-art virtual production facility that has been used commercially on major productions including *3 Body Problem*, *Culprits*, and *Gangs of London* for clients such as Amazon, Netflix, Disney, Apple, and the BBC. MARS Academy offers hands-on, volume-based training designed to address the rapid technological changes in virtual production. Its course offerings range from introductory programmes such as VP101, a four-day intensive covering the virtual production pipeline from render node to screen, to advanced courses such as the VP Supervisor Masterclass. It also offers specialised training for different roles including producers (VP Scheduling and Financials), VFX artists, camera and lighting professionals, and art departments. The academy has strong industry backing: it is the only ScreenSkills-endorsed training organisation with a home base at a commercially working virtual production studio (ScreenSkills, 2025). Since launching, it has trained over 700 industry professionals, including heads of department working for major studios. In January 2026, Dr Jodi Nelson-Tabor was appointed as Director of MARS Academy, having previously built Final Pixel Academy and bringing expertise in curriculum strategy for real-time technology training.

The proximity of West London to the UK headquarters of the world's three leading social media platforms - YouTube, TikTok and Instagram - in the King's Cross/Farringdon area is both a strength and an opportunity that could be further harnessed for the benefit of West London's content creators. This concentration creates a significant tech hub in the King's Cross regeneration area, positioned between traditional media in Soho and the Shoreditch/Old Street tech corridor. London remains Meta's largest engineering hub outside the US. Google has been expanding in London since 2007 and it is now the company's largest engineering hub outside the US. Comparing YouTube's UK audience with streaming platforms and traditional broadcasters is instructive. Ofcom's *Media Nations 2025* report provides the most authoritative audience comparison data, revealing dramatic shifts in UK viewing patterns (Ofcom, 2025). YouTube has become the second most-watched video service in the UK, overtaking ITV and positioned only behind the BBC, a historic milestone in British broadcasting, representing the first time a non-broadcast, user-generated content platform has commanded greater audience share than century-old public service broadcasters.

The new free trade agreement between the UK and India offers opportunities that are substantial and multi-layered. The UK-India Comprehensive Economic and Trade Agreement (CETA) was signed in July 2025 after negotiations that began in 2022, and is widely described as the UK's most economically significant bilateral free trade agreement since Brexit (UK Government, 2025). Following the FTA, Prime Minister Starmer led a trade delegation to Mumbai in October 2025, placing screen industries at

the centre of the UK-India economic relationship. The BFI and India's National Film Development Corporation signed an MOU establishing framework cooperation across film, television, video games, immersive media and moving image sectors (BFI, 2025). This covers enhanced co-production opportunities, skills development and exchange programmes, film heritage conservation and restoration, knowledge sharing on technological developments, and audience engagement through promoting Indian films in the UK and British films in India. Yash Raj Films, one of India's largest production companies, committed to shooting three Bollywood productions in UK locations from 2026 onwards, representing a significant return of Bollywood production to Britain and bringing immediate production spend, jobs, and showcasing of UK locations and facilities to global audiences. The UK and India already have a bilateral audiovisual co-production treaty from 2005, one of only twelve such treaties the UK has. The FTA creates economic conditions that make co-productions more attractive by reducing trade barriers and facilitating cross-border collaboration. Under the existing treaty, co-productions require a minimum 20% financial contribution from each partner, with creative and technical contributions proportional to financial investment. The emphasis on shared creative heritage suggests opportunities beyond pure commerce, exploring diaspora stories, historical connections, and contemporary cultural exchanges that could generate commercially viable content with built-in audiences in both markets. A significant number of the international productions pivoting to the UK to take advantage of the Enhanced AVEC are Indian productions.

There are also opportunities within the games sector. The UK government has recently announced a £30 million Games Growth Package as part of its Modern Industrial Strategy (DCMS, 2025). This includes £5.5 million for 2025–2026 (up from £3–5 million in previous years), offering grants of £50,000–£150,000 for commercial game development. The fund has supported hundreds of projects since 2015 and is specifically aimed at early-stage studios and new IP development. The package also establishes a new UK Video Games Council, giving the industry a direct line to government for policy influence, though critics note it is dominated by major studios rather than worker representatives. An industry-led UK Games Skills Network has been created to address skills gaps and create clearer career pathways. A video games growth programme, run by UKIE in partnership with Tencent and the Department for Business and Trade, supports 30 studios annually with mentoring, expert support, and funding advice to help them scale. There are also opportunities emerging from new independent studios formed by laid-off developers, potentially creating a wave of innovation similar to that which followed the 2008 financial crisis. The £30 million package comprises two components. First, the expansion of the UK Games Fund is UK-wide and open for applications from studios anywhere, including London, for grants in the £50,000–£150,000 range. Second, there is dedicated support for the London Games Festival, specifically aimed at doubling the annual investment deals made at the festival from current levels to £30 million, and strengthening the capital's position as one of Europe's principal games hubs.

## Threats

The UK screen industries remain heavily exposed to the US economy. When Trump announced plans for a 100% tariff on films 'produced in foreign lands,' calling foreign

productions a 'national security threat' that brings 'messaging and propaganda' into the US (Trump, 2025), this signalled a significant threat to the UK. 65% of total UK film production spend comes from US studios and streaming platforms (BFI, 2025). Even before any tariff is implemented, the uncertainty causes projects to be cancelled or delayed. Companies will not greenlight productions when they do not know if they will face double the distribution costs. BECTU warns this could be a 'knock-out blow to an industry that is only just recovering' from COVID-19 and the 2023 writers' strikes (BECTU, 2025). The games industry faces different but equally serious threats. Trump's 'Liberation Day' executive order of 2 April 2025 announced tariffs of 46% on Vietnam, 49% on Cambodia, and 24% on Japan (Executive Office of the President, 2025), precisely where gaming hardware components are manufactured. While UK games companies do not primarily manufacture hardware, they suffer when global publishers freeze spending and cancel projects due to economic uncertainty and falling investment. The UK creative industries are structurally dependent on US investment but have no control over US policy.

Competition from international markets poses a major threat. As one trade representative explained (Interview, 2025):

*'In practical terms, we're competing with a relatively small number of cities globally that offer the same production advantages. Off the top of my head: New Orleans, Vancouver, Toronto, Budapest, Prague, Cape Town, Wellington, Atlanta, Gold Coast in Australia... Probably not more than that in terms of the really big ones. One of the easiest ways to track global appeal is to see where Disney's going. Disney has probably 75% of the global box office in English-speaking cinema worldwide. When they're spending \$250 million on a single film for production and marketing, they usually shoot either in Atlanta, here in London, or Gold Coast. That's driven partly by star demands. Chris Hemsworth doesn't want to spend too much time away from home, and he has enough sway now as a producer to influence where he shoots. But it's also because Australia doubled its location offset at the end of 2024.'*

Tax credits and incentives have become the global standard for attracting screen production, and there has been an intensifying competitive escalation over the past few years. The Audio-Visual Expenditure Credit is part of a much broader international landscape. Almost every significant production territory now offers some form of incentive, typically ranging from 20–45% of qualifying expenditure. What is particularly striking is the trend of countries actively racing to match or exceed competitor rates. 2024–2025 has seen a wave of increases and new programmes Entertainment Partners, 2025b). The Czech Republic raised its rate from 20% to 25% and tripled the per-project cap (Czech Film Commission, 2024; *Screen International*, 2024). Denmark introduced a new 25% incentive launching in 2026 (Danish Film Institute, 2025). Germany increased its rate from 20% to 30% under the German Federal Film Fund from February 2025 (Cineuropa, 2025; DFFF, 2025). British Columbia increased its production services credit from 28% to 36%, retroactively to January 2025 (Government of British Columbia, 2024). Ireland added an 8% uplift for independent films, bringing them to 40%, matching the UK,

plus a new 20% incentive specifically for unscripted content (Irish Government, 2025; Irish Government, 2026). Even Romania restructured and relaunched its programme after financial difficulties, with plans to potentially increase from 30% to 40% (*Screen Daily*, 2024; *Variety*, 2025).

The competitive logic is revealing. Countries explicitly frame changes as necessary to 'remain competitive' with neighbouring territories. Spain layers federal rebates (25–30%) with aggressive regional incentives: the Canary Islands offer 45–50%, the Basque region 35–70% (Entertainment Partners, 2025a; *Screen Daily*, 2025). Hungary extended its 30% programme through 2030 specifically to provide certainty for production financing (*Budapest Reporter*, 2026; *Entertainment Partners*, 2025a). Italy differentiates rates based on cultural criteria: 40% for productions using Italian talent, 30% for foreign talent (*Entertainment Partners*, 2025a). There is also geographic diversification beyond traditional hubs. Serbia, Portugal, and Greece all have active programmes (*Production Service Network*, 2025). Within the US, states are continuously adjusting: New York just raised its annual cap to \$800 million through 2036, California is making its credit refundable from July 2025, and even smaller markets such as Virginia and Nova Scotia are expanding their funds (*Entertainment Partners*, 2025a).

For the UK, Canada and Australia represent the primary competitive threat given their English-language advantage. According to 2024 data from ProdPro, the UK captured \$5.91 billion in production spending compared to Canada's \$5.4 billion and Australia and New Zealand's \$2.04 billion combined (ProdPro, 2025), making Canada remarkably close to the UK at approximately 10% behind. Both territories are aggressively competing: British Columbia raised its incentive from 28% to 36% effective January 2025, while Australia nearly doubled its Location Offset from 16.5% to 30% in July 2024, explicitly to 'remain competitive' (*Deadline*, 2024; Australian Government, 2024). Although the data refers to location shoots rather than studio days, a recent industry survey showed Toronto ranked first and Vancouver ranked third as preferred filming locations for 2025–26, with the UK placed second between them (ProdPro, 2025; *Hollywood Reporter*, 2025), suggesting producers are responding to the cost differential: both Canada and Australia offer the English-language advantage plus significantly lower below-the-line costs. While the UK maintains advantages in period drama infrastructure and prestige, with 65% of UK film spending coming from US studios and streamers (BFI, 2025), the financial calculus is shifting as these footloose American productions respond directly to incentive percentages and production cost differentials.



**Versa London  
Studios, Acton**

## HERITAGE

The threats outlined above - international competition, volatile commissioning cycles, escalating tax incentive races, and dependence on US investment - might suggest that West London's convergent screen industries face an uncertain future requiring primarily defensive strategies. Yet the preceding analysis reveals a different strategic imperative: these challenges demand not retreat but renewed articulation of West London's distinctive competitive advantages, many of which are rooted precisely in what conventional economic frameworks struggle to measure: heritage, accumulated expertise, and place-based institutional memory. Unlike purpose-built studio complexes or greenfield creative quarters that compete purely on financial incentives and physical infrastructure, West London possesses 125 years of continuous screen production history that has generated irreplaceable assets: specialised supply chains evolved through decades of practice, creative networks sustained across generations of practitioners, and architectural and cultural landscapes that international clients value as markers of authenticity and prestige. However, this heritage currently functions as what might be termed 'dark matter' within West London's creative economy, materially present and structurally significant, yet largely invisible in policy frameworks, development strategies, and external marketing. As one studio head interviewed for this report observed, the absence of a recognised regional brand identity represents a missed opportunity to leverage precisely those attributes that cannot be replicated through tax incentives alone. The following section therefore examines West London's screen heritage not as nostalgic retrospection but as strategic asset, identifying specific historical achievements and place-based narratives that could inform a new marketing framework positioning West London as a globally distinctive screen industry cluster whose competitive advantage lies in depth rather than simply scale.

One of the studio heads interviewed for this report stated (Interview, 2025):

*'A recognised brand for the area, something like 'West London Film Hub,' 'West London Film District,' or 'West London Screen District,' could collect all the film and media industry businesses under a regional identity with membership, a forum, and a place where businesses can be represented, have a voice, and share a brand. Having that in our area, given the concentration of media industry businesses, would be invaluable. But there is not one at the moment, and it would be helpful if local authorities could help implement it.'*

The area has a unique heritage story, starting with Cecil Hepworth's Walton-on-Thames Studios in 1899, followed by Ealing Studios in 1902, the Shepherd's Bush Studios in Lime Grove, opened by Gaumont in 1913, and Twickenham Film Studios, opening in 1913 as the largest film studio in London and home to the London Film Company. The post-WWI boom in British production saw a further expansion of cinema-building in West London, with Surbiton Studios, opened in 1918 by Stoll Pictures, then one of the largest British film producers of the 1920s, and Isleworth Film Studios, opened in 1919 by the Samuelson Film Manufacturing Company. Although the Metropolitan Film Studios in Gladstone Road, Southall, which opened in 1924, were burned down by fire in 1936, they

were rebuilt and used until 1958. Whilst some of these studios did not survive the transition to recording sound between 1928 and 1932, most did, and by the 1940s West London and its surrounds (Elstree, opened in 1914 originally as Neptune Studios; Shepperton in 1931; Pinewood, opened in 1936 by Rank) were established as the principal cluster for British film studios.

By the 1950s, West London was also fast becoming the primary cluster for television studios and supply chain companies. The distinctive supply chain for film production which emerged from the 1930s onwards led to companies providing sets, cameras, lights, rigging, grip equipment and SFX settling in and around West London. The British subsidiary of Technicolor, for example, was launched in 1935, based in West Drayton, where it remained until 2008. This continued with the establishment of TV studios in West London when, in 1949, the BBC acquired land at White City for the new Television Centre, opened the Lime Grove Studios in 1950, and the Ealing Green Studios in 1955. As corporate hire of cameras and lights expanded in the 1950s, Lee Lighting opened in Kensington in the 1960s, and Samuelson relocated in 1988 from Cricklewood to Greenford. When television expanded into cable, satellite and subsequently digital platforms, British companies and US corporations tended to take offices in West London if studio space was required, or Soho if it was not.

This infrastructure has been sustained by a complex interlocking set of supply chains providing short-form and long-form content to cinemas, non-theatrical and digital outlets. When feature film production suffered recession in the early 1960s and the late 1980s and early 1990s, leaving studios lying empty; demand was met by the growing advertising industry for television. An essential part of West London's story is the role that public transport played in connecting it to the legal and financial markets for film production, exhibition and distribution in Soho.

## **The Circulation of Creative Labour and Physical Materials**

Understanding West London as a Marshallian cluster rather than simply an aggregation of studios explains both its historical persistence through multiple technological revolutions and its continued vitality as a centre of creative labour and innovation, positioning the cluster not as legacy infrastructure but as a living production ecology whose accumulated capabilities and institutional memory constitute irreplaceable strategic assets for Britain's creative economy. West London's screen industries cluster grew, over more than a century, along the lines of the Underground, a network whose expansion into the western suburbs created the conditions for one of the world's most productive concentrations of creative labour to take root, shift, disperse, and continuously regenerate. The Underground lines form the circulatory system of the West London screen cluster. The Piccadilly, the Metropolitan, the Central, the Northern, the Circle and Hammersmith & City, the Bakerloo, the Jubilee, and the District lines have together sustained, for over a century, the conditions under which creative labour can remain mobile, connected, and productive across nine boroughs that are, by any measure, a single industrial district.

What this expanding web of lines created, over a century and a half, was not merely a transport system but an ecology of creative circulation through which specialised

knowledge and skills are absorbed unconsciously by those who live and work within the cluster. The Underground made that air breathable across a vastly wider geography. It also enabled a form of economic resilience that pure market analysis misses. As land values and rents have risen in one part of the cluster such as Soho, Notting Hill or Chiswick, creative workers and the small businesses that serve them have moved outward along the lines, finding cheaper studios in Acton, affordable flats in Southall, accessible workshops in Wembley or Harrow. New businesses have started up in the cheaper zones, often founded by people trained in the more expensive ones. The cluster has breathed in and out along its transit corridors, contracting under pressure and expanding into affordability, without losing the connective tissue that makes collaboration possible.

Running broadly parallel to the Underground network are two historic arterial roads that underpin different parts of the screen industries value chain through the movement of physical goods around the cluster. To the north, the A40 corridor links the media and technology cluster around BBC Television Centre and White City Place with the large-scale studio infrastructure of Pinewood Studios at its western end. To the south, the A4 corridor, historically the Great West Road, and known in its Hounslow stretch as Golden Mile London, hosts a dense concentration of corporate headquarters, advertising agencies and broadcast companies, including Sky and major international firms at Chiswick Park, functioning as the corporate and advertising heart of the region's screen economy; the corridor continues east into Westminster through the advertising centre of Fitzrovia. Together, these three corridors - production (A40), corporate media and advertising (A4), and the connective infrastructure of the London Underground - form the spatial framework through which West London operates as one of Europe's most concentrated and globally connected screen industry ecosystems.

## **Inner London**

### ***Hammersmith & Fulham***

The London Borough of Hammersmith & Fulham has developed a distinctive position within London's creative economy through the convergence of broadcasting infrastructure, music industry activity, and live performance venues. The concentration of live music and theatre facilities in Hammersmith has historically facilitated a rich ecosystem of literary and artistic activity, attracting literary agents, casting directors, and record companies whose proximity to performance venues and broadcasting facilities created mutually reinforcing networks of creative industry professionals. This geographic clustering of complementary creative sectors with broadcasting anchored in Shepherd's Bush and White City, music production and recording concentrated in Hammersmith proper, and live performance venues distributed across the borough; it has generated a creative economy infrastructure whose significance extends beyond individual institutions to encompass the place-based communities and professional networks that developed around them.

Shepherd's Bush should be understood as a distinct London village whose identity has been profoundly shaped by broadcasting. At its centre stood BBC Television Centre, opened in 1960 and for decades the symbolic and operational heart of British television,

producing news, drama, comedy, light entertainment, and major national events. Purpose-built as the first facility in Britain designed specifically for television production, Television Centre became the spiritual home of BBC Television, producing iconic programmes including *Doctor Who* (1963–1989), *Top of the Pops* (1964–2006), *Blue Peter* (1958–present), *Monty Python's Flying Circus* (1969–1974), *Fawlty Towers* (1975–1979), *The Two Ronnies* (1971–1987), *Parkinson* (1971–1982; 1998–2007), and *Strictly Come Dancing* (2004–present), along with countless news broadcasts and coverage of major events. The breadth and cultural impact of programming that emerged from those studios established Television Centre as one of the most important broadcasting facilities in the world.

The building itself became an architectural icon. Designed by architect Graham Dawbarn with a distinctive circular layout, Television Centre became a recognisable symbol of British television, with its central courtyard featuring a statue of Helios that appeared as a familiar backdrop in numerous productions, representing the glamour and prestige of BBC programming. Television Centre anchored a dense local ecology of studios, offices, freelancers, pubs, suppliers, and housing, giving Shepherd's Bush a recognisable broadcast-village character within Hammersmith & Fulham that persisted throughout the facility's operational period until the BBC largely vacated the building in 2013, consolidating operations elsewhere.

Adjacent to Shepherd's Bush is White City, also within Hammersmith & Fulham, whose history is rooted in modernity and mass spectacle. Developed around the 1908 Franco-British Exhibition, White City later became closely associated with broadcasting and media infrastructure, hosting BBC offices, studios, and technical facilities that expanded the Corporation's presence beyond Television Centre itself. Together, Shepherd's Bush and White City form a linked broadcast and media village cluster, illustrating how television in Britain grew not just through institutions, but through place-based communities embedded in London's evolving urban fabric.

Today, White City hosts a diverse range of media companies that have transformed the area into a thriving creative hub. The BBC maintains a significant presence with BBC Studios, BBC Global News, and BBC Studioworks operating from Broadcast Centre and other facilities at White City Place. Publicis Media made a major commitment to White City in 2018, consolidating all six of its UK media agencies into one location at Television Centre, bringing over 2,000 staff to the area in what represented the largest office lease in London that year (Publicis Groupe, 2018; London Borough of Hammersmith and Fulham, 2018). This consolidation includes agencies such as Zenith, Starcom, Blue 449, Digitas, Performics, and Spark Foundry. Hammersmith proper maintains its own important cluster of media businesses, particularly around the Hammersmith Grove and Riverside areas, continuing the borough's long tradition as a major centre for British broadcasting and media production.

Before the borough's television and music industry prominence, Hammersmith hosted significant film production activity. In 1933, a former Victorian iron foundry on Crisp Road was converted into Riverside Studios, a compact film facility with two sound stages. Between 1937 and 1946, the studios were owned by Jack Buchanan and produced

notable films including *We'll Meet Again* (1943) with Vera Lynn and *The Seventh Veil* (1945) with James Mason. From 1946 onwards under Alliance Film Studios, Riverside produced films including *They Made Me a Fugitive* (1947) with Trevor Howard, *The Happiest Days of Your Life* (1950) with Alastair Sim and Margaret Rutherford, and *Father Brown* (1954) with Alec Guinness.

In 1954, the BBC acquired Riverside Studios for television production, with the building officially opened by Queen Elizabeth The Queen Mother on 29 March 1957. This began one of the most productive periods in the facility's history. Series 2 to 6 of *Hancock's Half Hour* were made at Riverside between 1957 and 1960, along with the science-fiction serial *Quatermass and the Pit*, *Dixon of Dock Green*, and early episodes of *Doctor Who* between 1964 and 1968. This transition from film to television production at Riverside Studios prefigured the broader transformation that would position Hammersmith & Fulham as a broadcasting rather than film production centre. Television production returned to Riverside in 1996 when *TFI Friday* with Chris Evans took up residence in Studio 1, followed by *CD:UK* (2003–2006), Channel 4's *T4* (2006–2009), and later BBC's *Never Mind the Buzzcocks* and ITV's *Celebrity Juice*. Since January 2025, the venue has been operated by the Anil Agarwal Riverside Studios Trust and today retains an active television production facility (Studio 1 offers 6,500 sq ft of HD and UHD studio space with audience seating for up to 468, operated by Riverside TV with links to BT Tower) combining its historic broadcasting function with a continuing programme of theatre, cinema, and live performance that has made it one of the defining cultural institutions of the borough for half a century.

Hammersmith's significance as a music industry hub emerged through the establishment of major independent labels and recording facilities. Music producer Chris Blackwell founded Island Records in Jamaica in 1959 and relocated the business to London in 1962. In 1973, the label moved to 22 St Peter's Square in Hammersmith with 65 employees, establishing offices and recording studios there. The basement was converted into a small recording studio nicknamed 'the Fallout Shelter', which incorporated the base of the chimney that was occasionally used in recordings to add reverb to vocals. Bob Marley used the Fallout Shelter to record tracks for his legendary album *Exodus*, which transformed him into a global phenomenon.

Island's commercial breakthrough came in 1964 when 'My Boy Lollipop' by Millie Small reached number two in both UK and US charts. The label diversified into rock in 1967, signing acts including Traffic, King Crimson, Jethro Tull, Free, Cat Stevens, Nick Drake, and John Martyn. British reggae band Aswad became another notable Island act, archetypal of the label's distinctive sound. Island Records also played an important role in film history, with Chris Blackwell serving as executive producer of *The Harder They Come* (1972), releasing the soundtrack featuring the now-classic title song by the film's star, Jimmy Cliff. This film became a landmark in bringing reggae culture to international audiences. In 1981, Blackwell used the label to finance a new film production and distribution company, producing the film *Countryman* (1982). In 1983, the film production company formed a partnership with Shep Gordon's Alive Enterprises to create Island Alive, which achieved success with several critically acclaimed films including *Koyaanisqatsi* (1982), *Mona Lisa* (1986), *Kiss of the Spider Woman* (1985,

which won a Best Actor Oscar for William Hurt), and the Talking Heads concert film *Stop Making Sense* (1984). Chris Blackwell sold Island Records to PolyGram in 1989; it is now part of Universal Music. A blue plaque was unveiled at the former Island Records building in 2022, marking 60 years since the label moved to the UK.

Britannia Row Studios was founded by Pink Floyd in 1976 following the release of their album *Wish You Were Here*, originally located in Islington but later relocated to Fulham in the mid-1990s. The studio was used to record Pink Floyd's *Animals* album and parts of *The Wall*, including the famous 'We don't need no education' school chorus. Other notable albums recorded there include *Cool for Cats* by Squeeze, *Closer* by Joy Division, and *Power, Corruption & Lies* by New Order. Located just off the King's Road in Fulham, Britannia Row welcomed many renowned artists over the years including The Verve, Snow Patrol, Adele, and Leona Lewis.

The borough's live music infrastructure has provided essential support for its broader creative economy. The Eventim Apollo (formerly the Hammersmith Apollo/Hammersmith Odeon) represents by far the most significant music venue in the borough. Originally opened as the Gaumont Palace on 28 March 1932, designed by architect Robert Cromie with 3,560 seats, the cinema screened its last regular film on 8 August 1984 and transitioned to primarily live shows and concerts. The venue gained a legendary reputation through iconic performances including several concerts by Bob Marley and The Wailers in 1976. The Eventim Apollo remains the borough's premier music venue and one of London's most iconic concert halls, maintaining Hammersmith's strong connection to live music performance.

The Hammersmith Palais, established at 242 Shepherds Bush Road, saw some of the greatest acts of the 20th and 21st centuries perform there before closing in 2007. The venue has since been demolished and the site reused as student accommodation, representing a loss of performance infrastructure whose cultural significance within the borough's creative economy history remains unacknowledged.

### ***The Royal Borough of Kensington and Chelsea***

The Royal Borough of Kensington and Chelsea holds a foundational place in British screen history through the pioneering work of William Friese-Greene (1855–1921), an inventor and early cinematography pioneer whose innovations helped establish the technical basis for film as a medium. In 1891, Friese-Greene positioned a camera outside 39 King's Road in Chelsea and filmed passers-by, creating what is believed to be the earliest moving depiction of London. This footage, whose negatives were later discovered in Paris and subsequently reconstructed, represents not merely a technical achievement but a cultural milestone, the first time London's urban life was captured in motion, transforming the city from static photographic subject to dynamic cinematic space. Friese-Greene's contribution is commemorated by a medallion on the front elevation of the Art Deco-style Curzon Cinema on King's Road, identifying him as a 'pioneer of cinematography'. This site formerly housed his laboratory, and the medallion's placement on a functioning cinema creates a direct physical and symbolic connection between the borough's pioneering past and its ongoing engagement with

screen culture. The Curzon's architectural distinction and continued operation as a cinema exhibition space further reinforces this continuity, positioning King's Road as a location where screen industry innovation began and persists.

The English Heritage Blue Plaque scheme provides a cartography of notable residents across London's boroughs, and Kensington and Chelsea's plaques reveal significant screen industry connections, though these appear to represent only a partial account of the borough's contributions to British screen history. Current blue plaques in the borough commemorate several figures with substantial screen industry significance: John Barry, the composer whose film scores defined the sonic identity of the James Bond franchise and whose work earned five Academy Awards; Audrey Hepburn, whose performances in *Breakfast at Tiffany's* (1961), *Roman Holiday* (1953), *My Fair Lady* (1964), and other films established her as one of cinema's most iconic actors; Alfred Hitchcock, whose directorial work fundamentally shaped the visual and narrative language of suspense cinema, with films including *Psycho* (1960), *Vertigo* (1958), *Rear Window* (1954), and *The Birds* (1963) establishing him as one of the medium's most influential auteurs; and Hugh Carleton Greene, former Director-General of the BBC (1960–1969). The presence of these blue plaques demonstrates that Kensington and Chelsea has been home to figures of considerable significance across multiple screen industry sectors: composition, performance, direction, broadcasting leadership, and television production. However, the borough's blue plaque landscape appears incomplete relative to its actual historical importance within British screen industries.

Beyond its significance as a site of screen industry innovation and a residential location for screen talent, Kensington and Chelsea has functioned prominently as a filming location, most notably through Notting Hill's transformation into a globally recognised cinematic space.

### **Westminster**

Cecil Court, the narrow pedestrian alley connecting St Martin's Lane to Charing Cross Road, seems an unlikely birthplace for an industry. Yet in the first decade of the twentieth century, this modest Westminster street housed the offices of some of Britain's earliest film companies. The Warwick Trading Company, which distributed the first newsreels of the Boer War, operated from numbers 4–6; the Charles Urban Trading Company, pioneers of early colour cinematography and nature documentary, worked from nearby. These firms weren't creating product (film production happened in purpose-built studios in Ealing, Elstree, and across the river in Walton-on-Thames) but they were building the infrastructure that would make cinema a viable commercial enterprise. They imported French and American films, they managed the complex logistics of film distribution when prints were physical objects requiring careful handling, and they negotiated with the emerging exhibition sector. That these early film businesses chose Westminster, and specifically the streets around Leicester Square and Charing Cross Road, tells us something important: from its inception, British cinema understood itself as part of London's entertainment economy, clustering near the West End theatres rather than isolating itself in industrial zones.

Leicester Square's transformation into the heart of British film exhibition created a gravitational pull that would shape Westminster's relationship to screen industries for the next century. The Empire (1884) and later the Odeon Leicester Square (1937) established the area as the symbolic centre of British cinema, the place where films received their royal premieres and their critical judgment. But the significance went beyond exhibition. Leicester Square's status created demand for proximate services: the film booking agents who negotiated distribution deals, the publicity firms that orchestrated press campaigns, the trade journalists who reviewed and reported. By the 1930s, Wardour Street, running north from Leicester Square through Soho, had become synonymous with British film distribution, lined with the offices of companies that controlled what British audiences would see. This wasn't Hollywood's vertically integrated studio system because British production remained scattered and often undercapitalised, but it was a distinctive industrial geography that concentrated commercial decision-making power in a few Westminster streets.

Soho's emergence as Britain's post-production capital from the 1950s onwards created a different kind of screen industry cluster, one built on technical craft rather than commercial dealmaking. The district's existing infrastructure of affordable office space, central location and proximity to Wardour Street's distribution offices made it logical for cutting rooms and sound studios to establish themselves there. But Soho's significance went deeper than real estate economics. The concentration of facilities created a labour market thick enough that freelance editors, sound mixers, and eventually visual effects artists could sustain careers without permanent employment. Knowledge circulated through this labour market in ways that shaped British screen craft: techniques learned on a documentary in one Soho cutting room would appear in a drama being edited three streets away; innovations in television commercial production would migrate into feature work. By the 1970s, Soho had developed a distinctive professional culture that prized technical excellence and creative problem-solving, a culture that would prove remarkably resilient as technologies changed from celluloid to magnetic tape to digital files.

The arrival of commercial television advertising in 1955 added another dimension to Westminster's screen industry ecosystem. While the ITV companies broadcast from around the country, the advertising agencies that created commercials concentrated in Soho and Mayfair, and the production companies that shot them clustered nearby. This created a significant economic base: by the 1980s, Britain was producing more television commercials per capita than any other European nation; but it also had creative consequences. Directors moved between commercials and features; cinematographers tested new techniques on thirty-second spots; post-production facilities invested in equipment that served both advertising and entertainment clients. The commercial production sector, often dismissed as merely mercenary, actually subsidised creative experimentation and technical infrastructure that benefited the broader screen industries. Moreover, it created career pathways that didn't depend on the boom-and-bust cycles of British film financing, offering screen professionals more sustainable livelihoods than feature production alone could provide.

The music video boom of the 1980s and early 1990s intensified these dynamics, adding yet another screen format to Westminster's industrial mix. Like advertising, music video production concentrated in Soho, using the same post-production facilities, employing the same freelance crews, and often involving the same directors. But music videos offered something that commercials couldn't: creative freedom within tight budgets, the chance to experiment with visual style and narrative structure without client committees demanding safer choices. The aesthetic innovations of British music video such as the kinetic editing, the integration of performance and narrative, and the willingness to embrace surrealism and abstraction fed back into other formats, influencing how television drama looked, how commercials were structured, and even how news programmes presented information. Westminster's screen industry cluster benefited from this format diversity, creating a professional culture that valued versatility and cross-format fluency over narrow specialisation.

The rise of digital post-production in the 1990s might have been expected to undermine Soho's centrality: if files could move electronically, why pay Westminster rents? Yet the industry largely remained, suggesting that Soho's value wasn't just about physical proximity to equipment but about social proximity to knowledge, relationships, and opportunities. The shift from analogue to digital did, however, change what kind of work happened in Westminster. Visual effects, once a specialised niche, became central to high-end production, and Soho facilities like Framestore and The Mill positioned themselves at the global cutting edge. Meanwhile, the expansion of multichannel television created demand for post-production capacity that Soho's facilities filled. The industry cluster proved adaptable, its firms investing in new technologies and capabilities while maintaining the collaborative culture that had always been Soho's competitive advantage.

Netflix's choice to locate its UK office at 30 Berners Street, just north of Soho proper but still firmly within Westminster, marks both continuity and change in this long history. On one hand, it reflects a century-old pattern: screen industry firms choose Westminster because that is where the industry is, where the talent pool is deepest, where chance encounters most easily translate into working relationships. Netflix needs to be near Soho's post-production facilities, near the talent agencies in Covent Garden, near the BBC's Broadcasting House, near the advertising industry's Fitzrovia offices, all the other nodes in London's screen industry network. On the other hand, Netflix's presence represents something genuinely new: a global technology platform operating at scales of capital and reach unimaginable to the Wardour Street distributors of the 1930s or even the independent production companies of the 1990s. The company's investment in British production, commissioning high-budget series, building studio space at Shepperton, suggests that streaming platforms understand what early film distributors grasped: Britain offers creative talent, technical infrastructure, and English-language production capacity that serves global markets.

Westminster also functions as a primary film location within the West London screen cluster, drawing productions not through studio infrastructure or supply chain proximity but through its role as a landscape of national symbolic significance: the visual grammar of British political and cultural life. The borough has featured in major productions

including *Skyfall* (2012), *The Crown* (2016–2023), and *Fast & Furious 6* (2013), and its Georgian and Victorian civic architecture is regularly employed to represent government ministries, courtrooms, and elite interiors across multiple historical periods.

The continuities are as striking as the changes. Westminster remains central to British screen industries. Over more than a century, the area accumulated infrastructure, expertise, and institutional relationships that became self-reinforcing. The commercial decision-making that once happened in Wardour Street distribution offices now happens in streaming platform headquarters and multinational studio branches, but it still requires proximity to creative talent and technical facilities. The post-production work that gave Soho its mid-century identity continues, now augmented by visual effects and digital intermediate work serving global productions. The advertising production that enriched Westminster's screen ecosystem in the television era persists, now creating content for digital platforms as well as broadcast. Even music video, often declared dead, continues to employ Westminster-based directors, editors, and VFX artists. The formats change, the technologies evolve, the companies rise and fall, but Westminster's role as the commercial and technical heart of British screen industries endures.

## Outer London

### **Barnet**

One of the most important moments in early British cinema occurred not in Soho but in Chipping Barnet over a hundred years ago, when moving images were as revolutionary as virtual reality seems today. In March 1895, film pioneer Birt Acres shot *Incident at Clovelly Cottage* outside his home at 19 Park Road, Britain's first movie, featuring his wife, baby, and a friend. From this modest suburban setting, Acres went on to establish Britain's first moving picture production company at 45 Salisbury Road and, crucially, to stage the first British projected movie performance on 10 January 1896 for the Lyonsdown Photographic Society, followed by a demonstration to the Royal Photographic Society on 14 January five weeks before the Lumière Brothers' more famous London screenings. Acres patented groundbreaking cinematographic techniques including the Kineopticon projector (1896) and the first home movie camera, the Birtac (1898), manufactured from premises in Nesbitt's Alley behind the High Street, where examples survive in Barnet Museum today.

This flowering of cinema innovation was no isolated phenomenon but part of a remarkable ecosystem of high-tech industries in early 20th-century Barnet: Elliott & Sons (manufacturers of Barnet Dry Plates, where Acres worked), Watson & Sons (optical and scientific instruments), Charles Hodson and John Swain & Son (photo-engravers), and the massive Dental Manufacturing Company. Chipping Barnet's history demonstrates that major creative industries grow from clusters of small specialist businesses, making Barnet's contribution to London's screen heritage as foundational as it is under-recognised.

Angels Costumes, the world's longest-established costume house, operates from a 160,000 sq ft purpose-built facility in Hendon, providing critical supply chain infrastructure to the UK's screen industries. Founded in 1840 by Morris Angel in Seven

Dials and remaining in family ownership across seven generations, Angels relocated its film and television operations to Barnet in 2002, creating what is now the largest professional costume house globally. The Hendon facility houses an estimated five million costume items across eight miles of rails, encompassing costume rental, making facilities (including specialist men's tailoring and ladies' making departments), preparation areas, and a suite of 15 designer offices. Angels has supplied costumes to 37 Academy Award Best Costume Design winners from Laurence Olivier's *Hamlet* (1948) through *Star Wars* (1977), *Titanic* (1997), *Shakespeare in Love* (1998), *The Great Gatsby* (2013), and *The Grand Budapest Hotel* (2014), and in 2016 received BAFTA's Outstanding British Contribution to Cinema Award in recognition of its unparalleled role at the heart of British and international film production. Significantly, Angels functions not merely as a costume supplier but as an innovation hub and talent incubator: the company employs up to six apprentices annually, has launched the careers of award-winning costume designers including Jacqueline Durran and Julian Day, and maintains specialist departments in armoury, military uniform, and jewellery that possess irreplaceable heritage knowledge. Chairman Tim Angel, CBE (former Chairman of BAFTA and former Governor of the BFI) leads the company alongside his children Emma (director of fancy dress), Daniel (head of costume), and Jeremy (creative director), ensuring continuity of expertise and institutional memory that spans from Victorian theatre to virtual production. Angels' presence in Barnet exemplifies West London's historical pattern of accommodating specialised, knowledge-intensive screen industry suppliers requiring substantial real estate, and positions the borough as a critical node within the cluster's costume and wardrobe supply chain.

Today Barnet's crucial role in the UK's screen industries is led by Screen London Barnet. Developed by Middlesex University, this initiative sees Barnet Council, Barnet and Southgate College and Troubadour Brent Cross Studios work together as founding partners, underpinned by a Screen Skills plan. Troubadour supplies major clients including Netflix, BBC, MTV, and the National Theatre and runs a Skills Academy across all its sites.

## **Brent**

Cricklewood Studios (1920–1938) in the area now known as Brent was one of Britain's most important silent-era film studios, active mainly in the 1920s and 1930s. It was operated by Stoll Pictures and later Gaumont-British, and specialised in literary adaptations, crime films, and prestige features. Notable films made at Cricklewood Studios include *The Four Feathers* (1921) and *The Farmer's Wife* (1928), directed by Alfred Hitchcock, before his move fully into sound cinema. Cricklewood was especially associated with the Stoll Pictures Sherlock Holmes adaptations, such as *The Hound of the Baskervilles* (1921). At its peak, Cricklewood was one of the largest studios in Europe. It pre-dated Pinewood and Ealing as a centre of large-scale production and played a crucial role in establishing Britain's silent-era film industry. The studio closed in 1938, and the site was later redeveloped, but historically it sits at the foundation of British studio filmmaking, especially literary and prestige cinema.

Samuelson Film Service, also based in Cricklewood, was founded in 1954 by Sydney Samuelson and his wife Doris, who began the business from their home with a £300 down payment on a Newman Sinclair clockwork camera that quickly paid its way through rentals. Sydney was soon joined by his brothers David, Tony, and Michael, and the company affectionately known throughout the industry as 'Sammies' expanded rapidly from its origins in Finchley to a half-shop in Hendon before establishing its purpose-built headquarters in Cricklewood, north London. The Brent-based operation grew into the largest film equipment servicing company in the world, providing 24-hour complete service across camera, lighting, grip, sound, crew, and transportation. This comprehensive facility enabled international films of any scale to shoot worldwide for the first time and galvanised the UK production industry, supporting both the fledgling ITV network in the 1950s and the boom in television commercials that followed.

Samuelson's contribution to British screen industries was profound and far-reaching: the company serviced all of David Lean's films including *Doctor Zhivago* (1965), thirteen James Bond movies, Richard Attenborough's *Gandhi* (1982), Stanley Kubrick's *2001: A Space Odyssey* (1968), and Miloš Forman's *Amadeus* (1984), among many others, while establishing international branches in Australia, Holland, France, South Africa, and the United States. Sir Sydney Samuelson's leadership and vision earned him numerous accolades including BAFTA's Michael Balcon Award for Outstanding British Contribution to Film (1985) and a BAFTA Fellowship (1993), alongside a BFI Fellowship (1997). His work was recognised with a CBE in 1978 and a knighthood in 1995 for services to the British Film Commission. He was appointed as the UK's first Film Commissioner in 1991, where he campaigned to promote Britain as a leading destination for international production and encouraged the government to introduce tax incentives that would transform the UK's competitive position in global film and television production.

In 1979, the Samuelson brothers created The Production Village in Cricklewood Lane. For approximately 21 years (1979–2000), The Production Village represented a visionary if ultimately unsustainable experiment in British screen production infrastructure. Opened in 1979 by the Samuelson brothers in the former Handley Page aircraft factory, the complex comprised nine film stages with comprehensive production facilities including cutting rooms, art departments, viewing theatres, and post-production suites, all serviced by Samuelson's nearby Cricklewood Broadway headquarters. What distinguished Production Village from conventional studio facilities was its radical integration of workspace and social infrastructure: the village green, duck pond, and two pubs, 'The Magic Hour' and 'The Hogs' Grunt,' created a self-contained creative community where technicians, directors, and crew could move seamlessly between production and informal collaboration. This hybrid model anticipated by several decades the contemporary understanding of creative clusters, which recognise that innovation emerges not just from shared equipment and facilities but from the social interactions, knowledge exchange, and community building that occurs when creative practitioners share physical space. Productions including *Hellraiser* utilised its facilities during the 1980s, though the complex struggled commercially and closed around 2000. Nevertheless, Production Village's ambition to create an ecosystem rather than merely a studio foreshadowed the cluster-based thinking that now shapes screen industry policy and infrastructure development across the UK.

## **Ealing**

Ealing Studios, the oldest continuously working film studio in the world, represents West London's most internationally recognised screen production heritage site, with a history spanning from its initial occupation by Will Barker Studios in 1902 through multiple ownership periods that have each contributed distinct chapters to British film and television history. Theatre producer Basil Dean acquired the site in 1929, founding Associated Talking Pictures Ltd, and in 1931 built the studio facilities at Ealing, transferring all production there. However, the studio's most celebrated period began in 1938 when Michael Balcon arrived from MGM to replace Dean as head of production, initiating what would become the studio's golden age. Under Balcon's leadership, which extended until the studio's sale in 1955, Ealing produced over 96 films, establishing a distinctive creative identity through the 'Ealing Comedies,' a cycle of films including *Kind Hearts and Coronets* (1949), *The Lavender Hill Mob* (1951), *The Man in the White Suit* (1951), and *The Ladykillers* (1955) that became synonymous with post-war British cinema's character. These films, celebrated for their gentle satire and themes of underdog rebellion, captured the spirit of post-war Britain, transforming actors including Alec Guinness and Stanley Holloway into international stars while establishing comedic and narrative templates that continue to influence British film production.

Following the BBC's purchase of the studios in 1955 for £300,000, the facility entered a four-decade period as a major television production centre, with 56 film crews at its peak using the studios as a base for location filming of dramas, documentaries and other programmes shot on 16mm and occasionally 35mm film, producing landmark programmes including *Quatermass and the Pit* (1958–1959), *Colditz* (1972–1974), *The Singing Detective* (1986), and filmed sequences for numerous other BBC productions. When the BBC sold Ealing Studios in 1995, the facility successfully transitioned back to film production while maintaining continuous operation, hosting contemporary productions including *Notting Hill* (1999), the revived *St Trinian's* franchise (2007–2009), *The Imitation Game* (2014), *The Theory of Everything* (2014), and interior scenes for *Downton Abbey* (2010–2015). This unbroken operational continuity from 1902 to the present positions Ealing Studios as both a living archive of British screen production techniques across silent film, sound film, and television eras, and as an active contributor to contemporary film and television industries, though its significance within West London's screen economy narrative remains somewhat siloed from the borough's other historical production facilities and contemporary strategic positioning.

Park Royal's significance in screen industry history represents a transformation from manufacturing powerhouse to contemporary production infrastructure rather than a heritage of early film production. The area's name derives from the short-lived Royal Agricultural Society showgrounds opened in 1903, but with road, rail and canal links, Park Royal was subsequently developed for industrial use, mainly during the 1930s (Brent Council, n.d.), becoming the largest industrial zone in southern England by the early 1930s (Brent Council, n.d.), with around 140 factories employing approximately 14,000 workers by 1929 (Angry Workers, 2016), manufacturing food, electrical equipment, paper and machinery. While this industrial infrastructure supported major manufacturers including McVitie's, Heinz, and the Guinness Brewery which opened in

1935 (*Angry Workers*, 2016), the area's connection to screen industries emerged primarily in the late 20th and early 21st centuries as traditional manufacturing declined and the Mayor of London's 2008 draft Planning Framework identified Park Royal as designated for growing economic clusters including 'television/film.' Today, Park Royal functions as a critical support infrastructure for London's screen industries, hosting Garden Studios' eight sound stages plus a specialised Virtual Production stage across multiple campuses, which have hosted around 85 productions and 120 virtual production projects since opening in 2021 (*The Knowledge Online*, 2025; *TV Studio History*, 2025), and RD Studios' £20 million facility opened in April 2022 with five stages specifically developed to fulfil ever-increasing demand for sound stages in London (Dean, cited in *Deadline 2021 Televisual*, 2021). The area also accommodates Park Royal Studios, established in 1987 as a leading film, photography and event hire facility, alongside prop hire companies and other screen industry support services. This concentration of contemporary production infrastructure, combined with the Park Royal Design District housing over 250 studios of artists, makers, designers, photographers, and filmmakers, positions Park Royal as a contemporary screen production cluster that leverages the area's industrial heritage - its transport connectivity, large-format buildings, and industrial zoning - to serve 21st-century creative economy needs rather than representing a site of historical film production continuity.

The British Broadcasting Corporation's acquisition and operation of Ealing Studios from 1955 until 1995 represented a pivotal chapter in British television production history, transforming a site already significant for its film heritage into a major centre for broadcast content creation. Following the BBC's purchase of the studios from the Rank Organisation, the facilities became a crucial production hub during British television's formative decades, hosting numerous landmark programmes that helped define the medium's creative possibilities and cultural impact. The BBC's tenure at Ealing saw the production of internationally significant series including *Quatermass and the Pit* (1958–59), *Doctor Who* (from 1963), and *Colditz* (1972–74), alongside substantial drama productions that established technical and creative standards for British television. The studios' infrastructure supported the transition from early television production methods to increasingly sophisticated multi-camera techniques, with the facility serving as a site where technical innovation and creative ambition converged. When the BBC sold Ealing Studios in 1995, it marked the end of an era in which the site functioned as one of British television's principal production centres, though the facility has continued operating under subsequent ownership, maintaining continuity in the location's screen production heritage that extends from Michael Balcon's Ealing comedies (1947–1957) through the BBC's television golden age to contemporary film and television production.

Southall Studios, which operated between 1924 and 1958 in Gladstone Road, Southall, represents both a significant chapter in West London's screen production history and a stark example of heritage erasure. Established by film pioneer G.B. Samuelson (the same producer who founded Isleworth Studios) Southall Studios was created through the conversion of an old aircraft hangar into a film-making facility. Following early productions including the silent comedy *Two Little Drummer Boys* (1928) and conversion for sound in the early 1930s, the studio's first period culminated with *Children of the Fog* (1935), directed by influential German expressionist Leopold Jessner, a Jewish filmmaker

working anonymously in exile from Hitler's Germany, with cinematography by Eugen Schüfftan, inventor of the Schüfftan process special effect. A catastrophic fire on 29 October 1936 burned the studios to the ground, destroying thousands of pounds worth of equipment and completed film reels, yet the facility was rebuilt at a cost of £9,666 (Farmer, 2022). After wartime requisition as a dance hall, Southall entered its golden age following acquisition by Alliance Film Studios in 1945, producing British film noir *Dancing with Crime* (1947) with Richard Attenborough, Dirk Bogarde and Diana Dors; drama *Judgment Deferred* (1952) starring Joan Collins; and comedies including *Miss Robin Hood* (1952) and *The Runaway Bus* (1954) starring Margaret Rutherford. At its peak in the early 1950s, the facility employed almost 100 permanent staff and successfully transitioned to television production, notably hosting *Colonel March of Scotland Yard*, starring horror legend Boris Karloff. Despite this substantial production history involving major British actors and over 65 films across three decades, the studios closed in 1960 and no trace of their former presence now exists. This complete physical and commemorative erasure contrasts sharply with Southall's contemporary significance as a location central to British Asian cinema, particularly through the work of filmmaker Gurinder Chadha, whose films including *Bend It Like Beckham* (2002) have positioned Southall as a globally recognised site for exploring British South Asian identity. The absence of any heritage recognition for Southall Studios' contribution to mid-twentieth-century British film production represents a lost opportunity to connect the area's industrial-era screen production legacy with its current cultural significance within British Asian screen industries.

## **Harrow**

The Kodak factory, established in 1891 on a seven-acre greenfield site just west of the Harrow & Wealdstone railway line, represents a critical yet often overlooked dimension of West London's screen industry cluster: the material substrate of cinematography itself. While studios, production companies, and broadcasting facilities occupy the visible centre of screen heritage narratives, Kodak's presence in Harrow constituted essential supply chain infrastructure without which British film and television production could not have functioned. The factory's significance extends beyond its role as a major local employer (by the 1950s the site covered 55 acres and employed approximately 6,000 people) to encompass its position as the primary supplier of film stock, photographic chemicals, and cinematographic materials to Britain's expanding screen industries throughout the twentieth century.

In its early decades, the factory developed and printed photographs while producing film stock to serve the mass expansion of photography as a popular pastime. However, the establishment of an on-site research laboratory by 1929 positioned Kodak Harrow as an innovation hub for photographic and cinematographic technology, continuously developing new film stocks, emulsions, colour processes, and technical solutions in line with founder George Eastman's entrepreneurial vision. This R&D capacity proved crucial to British cinema's technical development: advances in film sensitivity, colour reproduction, and processing efficiency pioneered at Harrow directly enabled new aesthetic possibilities and production efficiencies for British filmmakers. The factory's integration into West London's screen cluster exemplifies Marshall's industrial district

dynamics: specialised technical knowledge circulated between Kodak's researchers and cinematographers working at nearby studios (Ealing, Isleworth, Southall, Elstree), with face-to-face consultation enabling rapid problem-solving and continuous incremental innovation in materials and techniques.

Kodak's presence created what former employees described as a 'Kodak community' in Harrow, where residential proximity to the factory mirrored the industrial district pattern observed across West London's screen villages. Employees frequently lived next door to colleagues or supervisors, with multiple generations of the same family working at the site, generating the kind of 'hereditary skill' and tacit knowledge transfer that Marshall identified as characteristic of successful industrial districts. The company sustained an extensive social infrastructure (sports facilities including golf courses, tennis courts, and Kodak F.C. football team; cultural activities through folk clubs, brass bands, and theatre societies; and regular social gatherings) that reinforced professional networks and knowledge circulation beyond formal workplace interactions. This social density facilitated what economic geographers term 'untraded interdependencies': informal knowledge exchange, trust-based relationships, and shared technical culture that enhanced innovation capacity and problem-solving effectiveness.

The 'Kodak hooter,' the factory whistle that summoned workers each morning until the early 1970s, became an acoustic landmark defining Harrow's industrial character, much as the physical presence of studios shaped the identity of Ealing and Shepherd's Bush. The Kodak Museum, opened in 1927, represented an attempt to codify and celebrate photographic and cinematographic heritage, with its 1947 catalogue *The Kodak Museum: A Permanent Exhibition Illustrating the History of Photography and Some of its Applications in Science, Art and Industry* documenting the technical evolution of image-making technologies. The museum's closure in 1985 and the dispersal of its collection to the National Science and Media Museum in Bradford prefigured the factory's own decline, with production ending in the UK in 2005 and final closure in 2017, symbolising both the technological shift from film to digital imaging and the broader deindustrialisation of West London's manufacturing base.

Harrow's significance in British screen industry history lies precisely in its invisibility within conventional heritage narratives: as a supplier of materials rather than a creator of content, Kodak's contribution was infrastructural and enabling rather than authorial and visible. Yet without the continuous supply of high-quality film stock, the technical innovation in colour processes and emulsion chemistry, and the responsive problem-solving that Kodak Harrow provided to British cinematographers throughout the twentieth century, the creative achievements produced in West London's studios could not have been realised. This positions Kodak as a critical node within the industrial district's supply chain architecture, not glamorous, but foundational. The factory's transformation into Eastman Village, a residential development by Barratt London and The Hyde Group, represents both loss of productive capacity and continuation of West London's historical pattern of repurposing industrial infrastructure for new uses. The site's heritage is partially preserved through collections at Headstone Manor Museum and the National Science and Media Museum, though the absence of substantial on-site commemoration mirrors the broader pattern of unacknowledged screen industry heritage across West

London. Recognising Kodak's role in British screen history requires expanding heritage frameworks beyond studios and talent to encompass the material and technical infrastructure that made screen production possible, a more complete understanding of the industrial district's interdependent ecology.

### **Hillingdon**

The London Borough of Hillingdon played a critical but often overlooked role in British screen history, functioning primarily as a technical and industrial hub rather than a filming location. Through the Technicolor laboratories at West Drayton and the vast EMI complex at Hayes, Hillingdon became a crucial node in the infrastructure that enabled Britain's emergence as a major screen nation. Established in the mid-1930s in West Drayton (historically Middlesex, now within the London Borough of Hillingdon), the Technicolor laboratories became the centre of colour film processing in Britain. These were not merely processing plants but major sites of innovation. The laboratories refined and industrialised the three-strip dye-transfer Technicolor process for British conditions, achieving consistent colour accuracy, durability, and scale comparable to Hollywood standards. This technical work enabled Britain's colour cinema golden age, supporting productions made at nearby studios including Pinewood and Denham, and films by major directors such as Michael Powell and Emeric Pressburger. West Drayton also trained a generation of colour technicians and developed process improvements that fed back into Technicolor's global operations, making it a critical site in the technological history of both British and international film.

EMI's significance to British screen history extends far beyond its better-known recording legacy. Founded in 1931, EMI became one of the most powerful and influential organisations in British film and television through its vast Blyth Road complex in Hayes (now the Old Vinyl Factory site). At its peak in the 1960s, the EMI Hayes site employed 14,000 workers, most of them local residents, making it literally a small city of holdings and development, with multiple buildings, offices, plants, testing areas, and factories. From this suburban base, EMI developed the sound recording, electronics, and broadcasting technologies that underpinned Britain's emerging film and television industries. The company manufactured broadcast equipment, cameras, and sound systems, played a crucial role in early television infrastructure, and anticipated later media convergence between music, film, and electronics decades before the modern studio-streamer era. This integration made EMI a proto-media conglomerate, functioning as a distributed media organisation linking industrial, scientific, and creative centres across London from Hayes to Abbey Road Studios (opened 1931 in St John's Wood), an early model for the networked structure of Britain's screen industries.

EMI's influence expanded dramatically when it absorbed Associated British Picture Corporation (ABPC) in 1969, thereby controlling Elstree Studios, one of Britain's most important film production sites. Through Elstree, EMI produced or supported Alfred Hitchcock films (*Blackmail*, *The Man Who Knew Too Much*), post-war British cinema classics, and large-scale international co-productions. Under Bryan Forbes, EMI Films became synonymous with a creative renaissance in British cinema from the 1970s to the 1980s, backing notable films including *Get Carter* (1971), *The Railway Children* (1970), *Alfie* (1966), *Death on the Nile* (1978), and *Watership Down* (1978).

EMI's model combined studio-based production with strong producer autonomy, positioning Britain not merely as a service base for Hollywood but as a creative originator in world cinema. The company sat at the intersection of British national cinema and Hollywood co-production, helping sustain the UK studio system and anchoring Britain as a serious screen nation between Hollywood and Europe. The EMI Archive Trust, established in 1996, maintains the company's historical archives on-site in Hayes, preserving this crucial industrial and creative heritage.

Although technically just outside the borough boundary in Buckinghamshire, Pinewood Studios (founded 1936) has been economically, socially, and logistically intertwined with Hillingdon throughout its history. Large numbers of Pinewood's workforce historically lived in Hillingdon, which provided housing, light industrial supply chains, and transport access. Pinewood productions routinely used Hillingdon locations and services, meaning that the studio's global output including the James Bond franchise, *Star Wars*, the Carry On films, and Marvel productions is inseparable from Hillingdon's local infrastructure.

Together, Technicolor and EMI reinforced Hillingdon's role as a critical technical and industrial node in the British screen industries, part of the wider west-of-London studio belt that included Pinewood, Denham, and other facilities. Rather than serving as a filming location or talent centre, Hillingdon provided the essential technological and manufacturing infrastructure that made Britain's screen industries viable at an international level. This positions the borough as an exemplar of how dispersed industrial capacity, innovation centres, and workforce communities combined to create Britain's distinctive model of screen production.

### ***Hounslow***

The Great West Road's Golden Mile London emerged during the 1920s and 1930s as a showcase of industrial modernity, characterised by striking Art Deco architecture that housed international firms including Gillette, Firestone, Pyrene, and Currys. While this stretch of road initially symbolised Britain's manufacturing prowess, it has undergone significant transformation in recent decades, transitioning from its traditional manufacturing and pharmaceutical base towards becoming a creative and media production hub. Today, the Golden Mile is anchored by screen-based industries including Sky, JCDecaux, and the developing Gillette Studios, representing a strategic evolution that preserves the area's architectural heritage while positioning it for contemporary creative economy success.

Golden Mile London's cultural significance extended beyond architecture into public consciousness through distinctive visual landmarks. For decades, drivers entering London via the M4 motorway encountered an illuminated, animated Lucozade advertising sign mounted on the wall of the Lucozade factory, which operated from 1953 until its demolition in late 2004. The sign, depicting a bottle emptying into a glass, became an iconic waymarker for the approach to London. Following a brief preservation campaign, the sign was relocated to Gunnersbury Park Museum in September 2004. A replica was subsequently installed, though this was controversially removed at the end

of 2015 and replaced with a digital billboard, marking a symbolic shift from the area's manufacturing past to its digital future.

The most significant contemporary development in Hounslow's screen industry landscape is the transformation of the Grade II-listed Gillette Factory into Gillette Studios. The Vinyl Factory, a creative enterprise founded in 2001 and based in neighbouring Hillingdon, has operated studio facilities at the Gillette Building since 2013, hosting ten major productions including *Miss Peregrine's Home for Peculiar Children* (2015), *Allied* (2016), *Bohemian Rhapsody* (2018), *Infinite* (2020), and *All the Old Knives* (2021). In March 2025, Hounslow Council approved a major expansion that will add six new sound stages and establish specialised capabilities in film, digital content creation, and virtual production. This development exemplifies The Vinyl Factory's wider business model of repurposing historic and listed buildings through investment in creative industry-led enterprises, with their principal operation at 180 Studios in the Strand demonstrating the viability of this heritage-conscious approach to screen infrastructure development.

While the Gillette Studios development represents Hounslow's contemporary screen industry presence, the borough possesses a far more substantial but largely unacknowledged cinematic heritage centred on Isleworth Studios. Film producer George Berthold Samuelson acquired Worton Hall in Isleworth in 1913, officially opening it as a film studio on 1 July 1914 with the filming of Conan Doyle's *A Study in Scarlet*, the first British screen adaptation of Sherlock Holmes. Over the following decades, Isleworth Studios became a significant production centre, shooting numerous silent films including adaptations of literary classics such as *Little Women*, and successfully navigating the industry's transition from silent films to talkies.

The studio's significance grew substantially when Alexander Korda leased the facilities in 1934. Under Korda's stewardship, Isleworth produced *Things to Come* (1936), based on H.G. Wells' *The Shape of Things to Come*, with Wells himself writing the screenplay. This period saw the studio attract major international talent, producing *Invader* (1936) with Buster Keaton and *Under Secret Orders* (1937) with Erich von Stroheim. The studio's final years maintained this prestige, with shooting for *The Third Man* beginning at Isleworth in 1948 before transferring to Shepperton, and much of *The African Queen* filmed there in 1951. The complex studio tank sequences featuring Humphrey Bogart and Katharine Hepburn were shot at Isleworth rather than on location in Africa due to safety concerns. Richard Burton made his screen debut at these studios. Isleworth Studios closed in 1952 and subsequently served for twenty years as the National Coal Board's Mining Research Centre.

The current state of heritage recognition at Worton Hall presents both a cultural loss and a strategic opportunity. According to contemporary accounts from film historians who have visited the site, the industrial estate now occupying the former sound stages and dressing rooms makes no acknowledgement of the site's cinematic past. Even the newly refurbished apartments within Worton Hall itself contain no recognition of the building's previous existence as a film studio or the internationally significant figures who worked there. Despite hosting productions including *Things to Come* (1936), *The Third*

*Man* (1949), and *The African Queen* (1951), and welcoming talents such as Humphrey Bogart, Katharine Hepburn, Alexander Korda, and H.G. Wells, Isleworth's film history remains unmarked by blue plaques or physical memorials of any kind.

This absence of heritage recognition represents an untapped asset for West London's screen industries. The borough's dual narrative as both a historic production centre that contributed to British cinema's golden age and as a contemporary hub experiencing renewal through facilities like Gillette Studios offers a powerful foundation for cultural and economic positioning. The connection between Isleworth's pioneering innovations in early British cinema and Golden Mile London's current transformation from industrial to creative economy hub provides a compelling continuity story that remains to be fully articulated and leveraged in the borough's screen industry strategy.

# FIVE STRATEGIC THEMES

**1. Historical Foundation and Continuous Production Presence:** The West London Convergent Screen Cluster represents the geographical and historical core of British screen industries, with an unbroken production presence spanning 125 years from Cecil Hepworth's Walton-on-Thames Studios (1899) and Ealing Studios (1902) through to today's concentration of high-end television drama and virtual production at Gillette, Garden, and RD Studios in Park Royal. Unlike purpose-built complexes tied to single companies, the cluster has demonstrated exceptional resilience, repeatedly adapting to new technologies and market conditions while retaining its character as the UK's primary screen production centre. This heritage is not merely historical but constitutes a living strategic asset: accumulated infrastructure, skills, and institutional memory that are irreplaceable to Britain's creative economy.

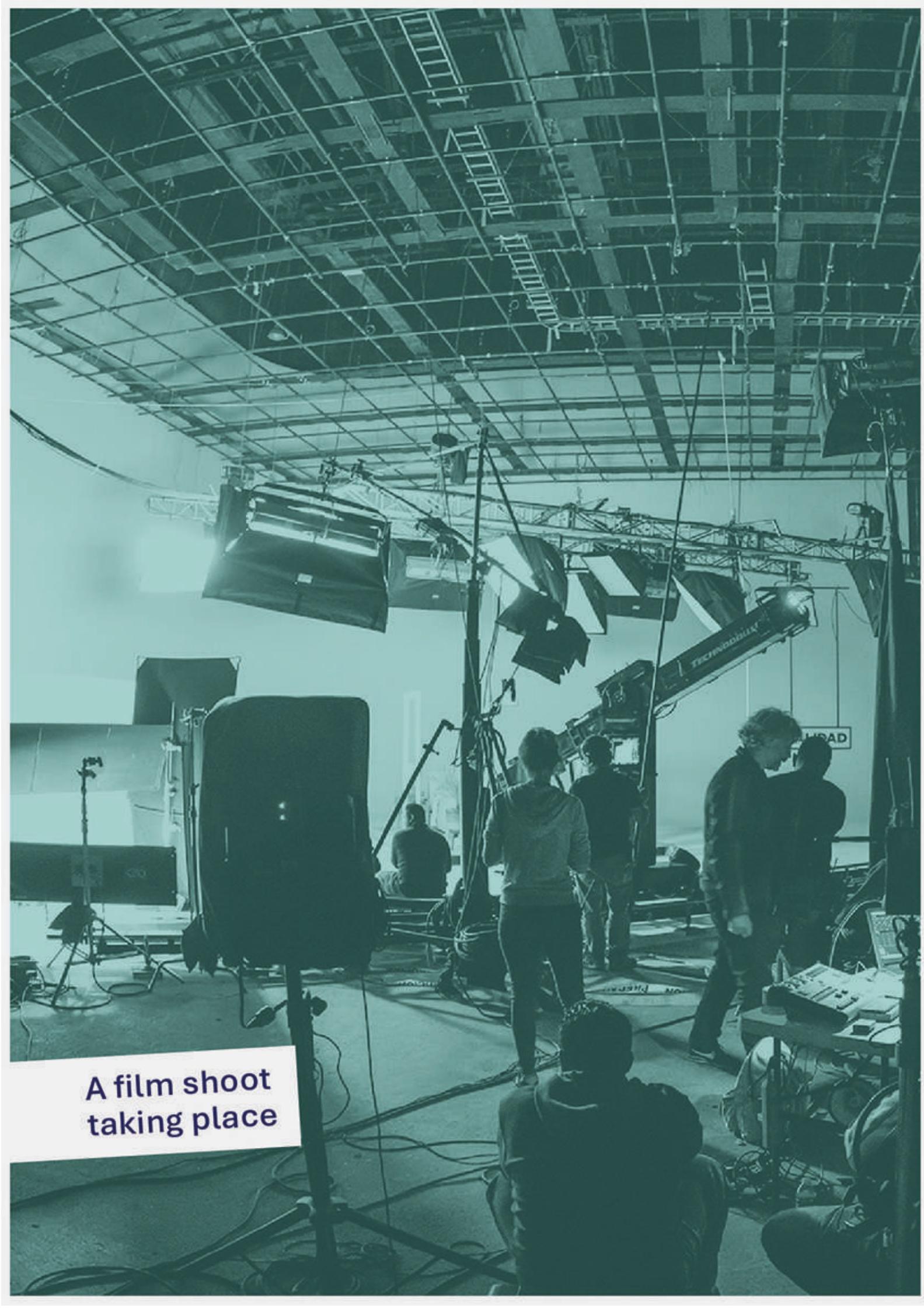
**2. Village Structure and Polycentric Ecology:** The cluster developed through London's historically distinct villages (Ealing, Shepherd's Bush, White City, Hammersmith, Southall, Isleworth, Hounslow's Golden Mile) rather than through single institutions, creating a polycentric production ecology fundamentally different from purpose-built studio complexes. Each node contributed specialised capabilities: studio production and comedy traditions (Ealing); broadcasting (Shepherd's Bush and White City); music-television integration (Hammersmith); industrial-scale support services (Park Royal). This structure generated the agglomeration dynamics Alfred Marshall termed industrial district effects: tacit knowledge, trust-based collaboration, and skills circulation through dense face-to-face interaction. Collectively, the cluster functions as a vast, interconnected mega-studio backlot unrivalled in scale, heritage density, and talent accumulation. Policy should reflect this polycentric reality rather than applying borough-level frameworks that fragment what is functionally a single production ecosystem.

**3. Transport as Production Infrastructure:** The London Underground has functioned not merely as transport but as production infrastructure, enabling the cluster's dispersed nodes to operate as an integrated industrial district. Distinct lines performed differentiated economic roles: the Metropolitan Line connected residential Metroland with production centres; the Piccadilly Line linked performance venues, cultural institutions, and Heathrow's global connectivity to the Golden Mile. The Elizabeth Line, opened in 2022, now functions as the cluster's contemporary spine carrying production activity, labour, and capital from Hillingdon and Ealing through the Central Activity Zone to emerging post-production hubs further east. Policy investment in transport connectivity within the cluster should be understood as direct investment in screen production capacity, not ancillary infrastructure.

**4. Heritage as Living Infrastructure:** The cluster's screen heritage presents a mixed policy picture. On one hand, significant sites have suffered physical erasure and lack of public recognition. On the other hand, the cluster also contains exemplary models of heritage actively renewed as productive infrastructure. Ealing Studios remains in continuous use as a working film studio, where contemporary productions are made within a built environment inseparable from one of the most celebrated traditions in British cinema, a living demonstration that heritage and commercial vitality are mutually

reinforcing rather than competing values. Similarly, 180 Studios' acquisition and revitalisation of the Gillette Studios in Hounslow exemplifies best practice in heritage-led regeneration: returning a landmark site to active use as a creative hub combining professional filming facilities for global and local producers. These models reconnect local residents with the cluster's distinctive history of innovation in technology and manufacturing while creating new economic and cultural value. These models should inform policy across the cluster. The strategic goal is not preservation for its own sake but the conversion of heritage assets into productive infrastructure, generating returns across screen production, tourism, education, inward investment, and community identity simultaneously.

**5. A Unified Policy and Marketing Framework:** The West London Convergent Screen Cluster requires a coherent policy identity that reflects its village-based structure, transport-enabled integration, heritage depth, and contemporary dynamism. The Elizabeth Line corridor should be positioned as the cluster's organising spine: a branded geography that makes tangible the connections linking dispersed production nodes, from Hounslow's Golden Mile through Ealing and Soho to emerging eastern hubs. Physical cluster signage at key gateway points would create visibility analogous to internationally recognised production districts while respecting London's polycentric character. The overarching policy narrative should frame the West London Convergent Screen Cluster not as a peripheral support zone but as Britain's essential screen production engine, the place where the real work happens, and the foundation on which any national screen industrial strategy must build.



**A film shoot  
taking place**

# STRATEGIC RECOMMENDATIONS

## 1. Visibility, Strategy and Marketing

- West London should seek to be formally recognised as a distinct and significant screen industries cluster within the broader Film London region, acknowledging both its unique characteristics and its integral role within London's wider screen economy. A shared cluster identity should be developed in collaboration with local authorities, Film London, and West London Business, bringing together the cluster's film, television, advertising, games and immersive sectors under a single, coherent regional narrative.
- The brand narrative should promote West London's 125-year production heritage, its village-based cluster structure, its dense and specialised supply chain ecosystem, its transport-enabled integration and its full-service production-to-distribution capabilities. In collaboration with Film London, a comprehensive international prospectus based on this narrative should be developed and actively marketed to global producers, studios, streamers and technology firms, articulating these distinctive strengths clearly and cohesively.
- An annual West London showcase event, delivered in partnership with London & Partners, could position the cluster as a global centre for screen technology innovation, attracting international investors, technology developers and production clients. West London CEZ should work more closely with Film London to increase the visibility of the supply side of the convergent screen industries, for example, by bringing UK and international producers on curated tours of West London's supply chain assets, such as Park Royal's Propland, in order to strengthen business relationships and generate new contracts.
- West London Business and its partners should deepen collaboration with Film London and the British Film Commission to attract inward investment to the cluster. Both organisations maintain a significant presence at the world's leading screen industry events such as MIPCOM and the American Film Market and are therefore well placed to promote West London's distinctive offer to international producers, studios and technology firms at the point of decision. All interviewees for this report reported receiving strong support from both Film London and the British Film Commission, particularly in relation to inward investment, underscoring the value of formalising and intensifying this relationship as a core component of the cluster's growth strategy.
- A shared, regularly maintained directory of local, national and international screen businesses and trade bodies should be developed and made available to local businesses and CEZ leaders to enhance market access and connectivity both to other UK clusters such as Manchester, Leeds, Glasgow and Belfast, and to existing and potential international markets, particularly beyond Europe.

## 2. Film London and The Elizabeth Line Screen Spine

- The boroughs should develop a coordinated narrative across West London, positioning the area as a globally distinctive screen industries cluster within the Film London strategic plan for London. Developing strategy around the 'Elizabeth Line Screen Spine' would reinforce the visibility of the ecosystem and signal to investors that West London constitutes a connected, infrastructure-enabled production cluster within the larger Film London region. The Elizabeth Line Spine connects London Heathrow to Park Royal, Soho and the Olympic Park in Stratford.
- The Elizabeth Line provides a once-in-a-generation opportunity to consolidate the cluster's spatial coherence and connectedness with associated London clusters. Strategic integration of transport, planning policy and economic development will be critical to sustaining cluster density and productivity.
- Coordinated planning around Elizabeth Line stations should prioritise affordable housing for London's screen workers, ensuring that production companies and specialist suppliers can remain embedded within the cluster as land values rise. Future development along the Elizabeth Line corridor should adopt a dual approach to workforce housing: mixed-tenure new-build incorporating Employment Related Accommodation and keyworker provisions to attract younger creative and technical talent into the cluster, alongside active borough-level policies to protect and make accessible existing family-sized housing stock for mid-career workers with children, recognising that without affordable family (accommodation with access to gardens, good schools, and generous living space) the cluster risks losing its most experienced and skilled workers at precisely the moment they are most professionally productive. Mixed-tenure models are already being actively explored by developers within the cluster geography, but there is a complementary need for policies specifically addressing family-sized accommodation, since developments oriented primarily towards single young professionals will do little to retain the skilled workers in their thirties and forties on whom the long-term stability and maturity of the cluster depends.

## 3. Business Development and Sustainability

- The nine West London boroughs should explore introducing a two level fee structure for filming permissions issued through their Borough Film Services (BFS), the bodies responsible for administering permits for filming on local authority managed locations including streets, parks, estates and public buildings. Under such a scheme, a reduced or concessionary fee tier would be available to productions qualifying for the Independent Film Tax Credit (IFTC), the enhanced Audio-Visual Expenditure Credit for low-budget films with core budgets of up to £15 million, claimable from April 2025. This would complement the existing London Filming Partnership framework coordinated by Film London, which brings together boroughs and other organisations to support filming activity across the capital, by adding a financial incentive specifically targeted at the

independent film sector. Given that this would require consultation with all nine boroughs and potentially coordination across the cluster, it is recommended as an urgent action point. The ability to offer reduced location permit costs to IFTC-qualifying productions would position the West London boroughs as a distinctively competitive destination for independent British filmmakers, precisely the sector the IFTC was designed to support.

- West London Business should work with Film London and relevant trade bodies to develop a coordinated, cluster-wide supply chain discount scheme for IFTC-qualifying productions. A concerted effort rather than a piecemeal approach reliant on individual businesses acting in isolation is most likely to yield results. The scheme would invite companies across the West London supply chain to commit to concessionary rates for qualifying productions, encompassing costume houses, props suppliers, studios, camera hire, transportation, and post-production facilities. A co-ordinated offer, promoted through a single prospectus and administered in partnership with Film London, would both incentivise independent producers to base their productions in West London and deepen the economic benefit within the cluster itself.
- A comprehensive Screen Industry Business Rates Review could be undertaken to assess whether current rating structures disproportionately disadvantage small production facilities, post-production companies and specialist suppliers. The existing system, designed primarily for retail and office sectors, does not adequately reflect the R&D-intensive and infrastructure-dependent nature of screen businesses, many of which are small, entrepreneurial firms delivering innovation within the UK's creative economy. Consideration should be given to targeted business rates relief linked to innovation benchmarks, skills commitments or environmental sustainability standards.
- West London Business could develop a cluster-wide sustainability initiative, encouraging companies across all nine boroughs to sign up to BAFTA albert's certification programme. Albert offers online tools, training, events, practical guidance and thought leadership to screen industry professionals, helping them to identify and act upon opportunities on and off screen that will lead to effective climate action. Given the grid capacity pressures already affecting parts of the cluster, the transition away from diesel generators on location and the adoption of renewable electricity should be treated as operational priorities, not merely environmental aspirations. Trade bodies representing supply chains currently outside albert's scope including screen advertising and immersive production should be invited into formal consultation with BAFTA albert to explore whether an amended or extended certification framework could be developed to serve these sectors.

## 4. Workforce Support and Upskilling

- An Open Innovation Programme could be developed to host regular workshops demonstrating new technologies, production workflows and sustainability standards. This would enable SME production companies and freelance practitioners to access innovation, reduce barriers to technology adoption and strengthen productivity across the West London cluster.
- A structured programme of continuing professional development (CPD) for mid-career workers, delivered by local businesses in partnership with the universities participating in West London's Screen Innovation Consortium, should form a core component of this provision. Consultation with existing trade associations collecting data on upskilling such as ScreenSkills and the Film and TV Charity is advised, as is collaboration with industry bodies such as MARS Volume, which has a strong record in delivering CPD to current mid-career workers in the convergent screen industries.
- Freelance Worker Hubs might be established through the conversion of underutilised local buildings into subsidised co-working spaces dedicated to screen industry professionals. These hubs would provide affordable hot-desking and meeting facilities, business advisory services covering tax, insurance and contracts, peer networking opportunities, mental health support and skills workshops. The model pioneered by All is Joy in Soho offers a potential example: occupying the former Warner Brothers De Lane Lea building at 75 Dean Street, a site with deep roots in British screen production history, All is Joy has repurposed a Soho Estates property to provide affordable studios, soundproofed screening and casting spaces, a video podcast studio, and a fully licensed bar for the creative grassroots, alongside office space for small businesses and freelancers at heavily reduced rates.

## 5. Skills for New Entrants

- A targeted careers and skills package should be developed for potential careers in Tier 3 and Tier 4 of the supply chain where SOC and SIC classifications fall outside recognised creative industries categories and, consequently, knowledge and understanding of career pathways and opportunities are often severely lacking in schools and university careers centres. This resource would clarify entry routes, progression pathways and required competencies.
- The boroughs should consider conducting a review of current provision for skills training in designated convergent screen industries career paths. This should collaborate with and consult Film London's Metro London Skills Clusters, which is making a significant contribution to the landscape and working in partnership with the National Film and Television School across all of London. It should also consult ScreenSkills, which plays a vital role regionally and nationally, to ensure provision stays up to date with the latest data on industry gaps and skills needs.

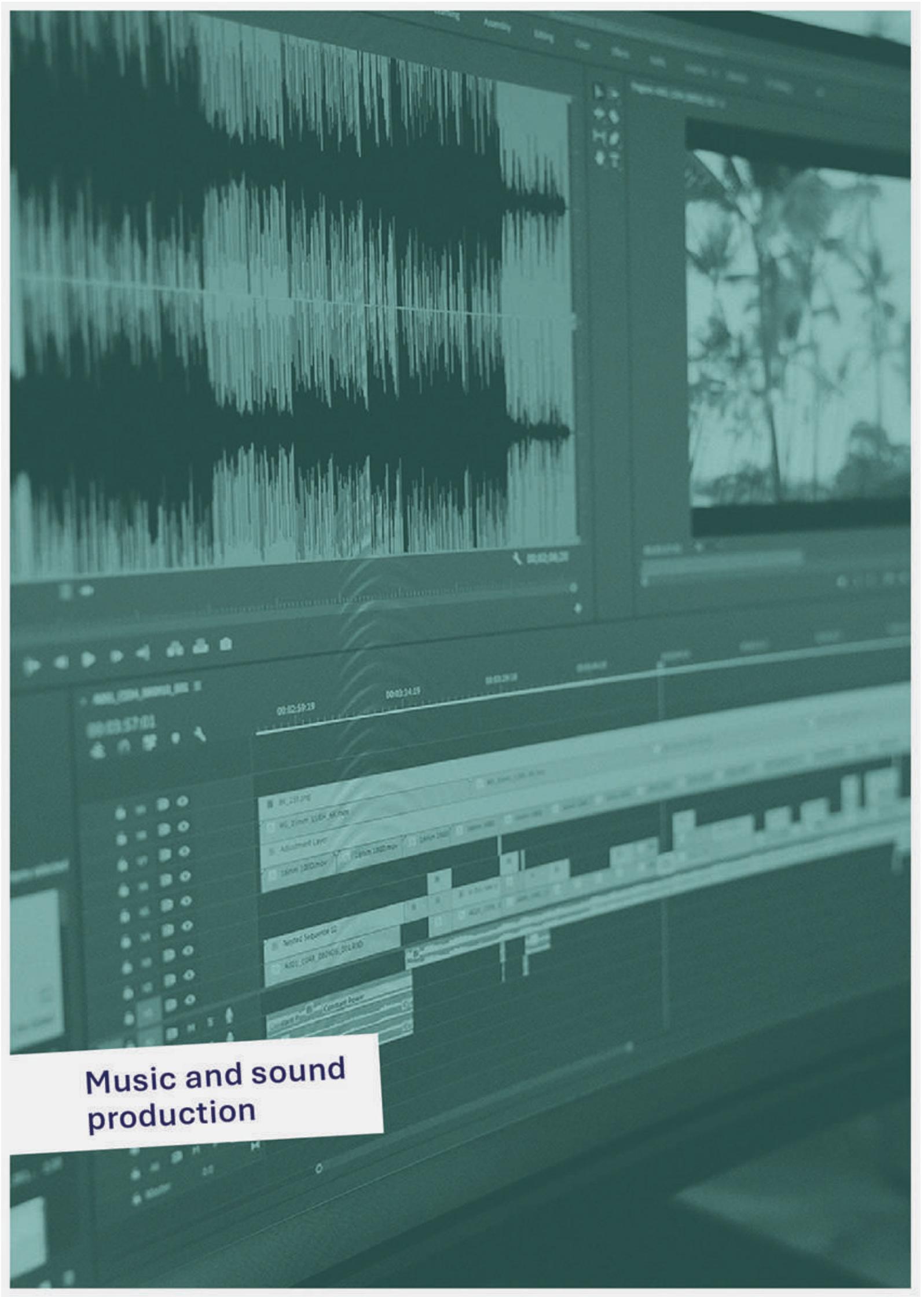
- At degree level, apprenticeship levy contributions from major employers could be pooled to create a coordinated West London Screen Apprenticeship Programme, maximising training capacity and standardising quality in provision around such priority areas as Unreal Engine. West London might also want to consider the model of West Yorkshire's Production Park, which runs an Academy of Live Technology offering specialised, industry-based undergraduate and postgraduate degrees focused on live events and virtual production, designed for careers in live music, theatre and touring, and providing hands-on experience in areas such as lighting, sound and visual design.

## 6. Identity and Heritage

- The West London brand should be embedded physically across the nine boroughs through coordinated wayfinding signage and a unified visual identity. Creating a legible cluster identity that is visible to residents, visitors and investors will strengthen civic pride, tourism and inward investment confidence.
- A comprehensive West London Screen Heritage Audit could be commissioned to identify historic sites, buildings and locations warranting protection, blue plaque recognition or heritage designation. This audit could inform a London-wide Heritage Trail connecting key sites across the boroughs and marketed internationally to film tourists and industry visitors. Public-facing heritage interventions could include new blue plaques, interpretative signage and memorials. It is recognised that such an audit is already underway in both Ealing (incorporating Park Royal) and Hounslow (centred on Golden Mile London).
- In Barnet, the borough could mark a Birt Acres heritage site comparable to that at Cecil Court in Westminster. Harrow could partner to establish a permanent exhibition on Kodak Harrow's role in the British screen industries. Hillingdon could collaborate with the EMI Archive Trust. Brent could install heritage markers at the former Cricklewood Studios site and commemorate the Samuelson Film Service.

## 7. Research and Innovation Funding

- A formal West London Screen Innovation Consortium could be established linking the production ecosystem with the University of West London, Brunel University of London and Middlesex University. This consortium would coordinate research and knowledge exchange in virtual production, artificial intelligence in post-production, sustainable production practices, immersive media and screen convergence technologies.
- Within this, a formal West London Screen Research Hub could be established to provide continuous monitoring of cluster dynamics using the CIC created for this report, enabling government and local authorities to anticipate skills shortages, infrastructure pressures and emerging technological opportunities. In a sector characterised by rapid technological convergence, an embedded evidence function is essential to maintaining global competitiveness.
- The nine boroughs should consider jointly establishing a West London Screen Innovation Cluster focused on advanced and convergent screen technologies. This would enable coordinated access to UKRI funding streams, including CoSTAR network opportunities, Knowledge Transfer Network innovation programmes and sector-specific industrial challenges, positioning West London as a national testbed for screen innovation and applied R&D.



**Music and sound  
production**

This report demonstrates that West London's screen industries operate as a nationally strategic production system rather than a local creative cluster. Their significance lies not only in scale, but in function: West London acts as a coordinating hub for commissioning, finance, legal and business affairs, intellectual property creation, specialist suppliers and highly mobile skilled labour. Through this role, it enables production activity across the whole of the UK, underpinning regional filming, sustaining inward investment and anchoring British companies within global value chains. Any assessment of the UK's screen economy that fails to account for this enabling role risks materially underestimating both national capacity and resilience.

The analysis further shows that current measurement frameworks and policy categories are no longer fit for purpose. Industrial classifications based on legacy distinctions between 'film', 'television' and 'broadcast' obscure the reality of convergent production, misrepresent supply-chain interdependencies, and systematically exclude freelancers, micro-businesses and hybrid firms that now constitute the backbone of the sector. As a consequence, West London's economic contribution appears artificially constrained at precisely the moment when evidence indicates high levels of innovation, diversification and cross-sectoral productivity. Reforming data collection and classification is therefore not a technical exercise, but a necessary foundation for effective industrial policy, workforce planning and place-based investment.

At a time of acute structural pressure - including global competition, rapid technological change, volatile commissioning cycles and a growing freelance crisis - West London's accumulated capabilities should be treated as critical national infrastructure. The cluster's dense supplier base, deep institutional memory and capacity to redeploy skills across screen, music, performance, games and live events make it uniquely positioned to support innovation in virtual production, AI-enabled workflows and next-generation content. However, these advantages are not self-sustaining. Without targeted intervention, including reform of business rates, recognition of mixed-use studios and suppliers, improved access to finance for SMEs, and workforce policies that reflect freelance realities, there is a significant risk of attrition rather than growth.

Positioning West London as a distinct cluster within London's internationally successful and innovative convergent screen industries provides a policy-ready framework to work from. It offers a way to align heritage, innovation and economic strategy; to recognise West London as an enabling engine for regional growth rather than a competitor to it; and to coordinate local, London-wide and national stakeholders around a shared understanding of strategic value. With appropriate recognition and intervention, West London's convergent screen industries can continue to deliver productivity, high-quality employment and global cultural impact, and should be treated accordingly within the UK's industrial and creative-economy strategies.

# APPENDICES

## Notices and Declarations

Emily Caston has asserted her right to be identified as the author of this work in accordance with the Copyright, Designs and Patents Act 1988.

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The modelling and findings presented in the report are based on data and information provided by third parties upon which Caston has relied. Any subsequent revision or update of those data will affect the assessments and projections shown.

The author declares that there is no conflict of interest in relation to the research and findings presented in this report. The author has no financial interest in, personal relationship with, or professional affiliation to any company, organisation, or individual referenced herein that could reasonably be considered to have influenced the conduct or conclusions of this research. This declaration extends to all nine West London local authorities commissioning this report, and to any public, private, or third-sector bodies operating within the study area. The research has been conducted in accordance with the ethical standards of the University of West London and the principles of independent academic inquiry.

## End notes

[1] The report was commissioned by West London Business on behalf West London authorities providing contributory funding: Barnet, Brent, Ealing, Hammersmith & Fulham, Hillingdon, Hounslow, Harrow, Westminster and The Royal Borough of Kensington and Chelsea.

[2] UKRI. 'The Hidden Screen Industries', Arts and Humanities Research Council University of West London (2021-23). AH/V015656/1. British Academy. 'An Archeology of Screen Advertising Production in Britain.' University of West London (2021-23) SRG2021\211360.

[3] Games Data figure of 40% from page 4. House of Lords Library (17 September 2025) *Creative industries: Growth, jobs and productivity* 'IT, software and computer services was the largest sub-sector, contributing £49.1bn in GVA, equivalent to just over 2% of the total UK GVA, and nearly 40% of the total creative industries' GVA.' House of Lords Library. This figure is based on 2023 data (provisional) from the DCMS Economic Estimates GVA 2023 report, published 19 December 2024.

[4] Scholarship on this topic, on which this report draws, includes the debates in the early issues of the *Media Industries* journal (2014-2021) and the myriad insightful publications on the history of creative industries policy in Australia and Britain, including but not limited to issues of R&D, measurement of SIC and SOC codes as well as mapping. The references are too numerous to list here but include Cunningham, Stuart. *Hidden innovation: Policy, industry and the creative sector* (University of Queensland Press, 2013), Swords, Jon 'Using social network analysis to understand the creative and cultural industries' in *A modern guide to creative economies*, pp. 55-76 (Edward Elgar, 2022), Cunningham, Stuart, and Marion McCutcheon. 'Rearticulating the creative industries-STEM relationship: the case of innovation precincts in South Australia.' *Creative Industries Journal* 16.1 (2023): 22-41 and Cunningham, Stuart and David Craig *Social Media Entertainment: The New Intersection of Hollywood and Silicon Valley* (NY Press, 2019).

[5] The CIC was constructed from a customised list of companies compiled through three sequential stages. Prior to drawing up these lists, a scoping study was conducted of 200 West London-based companies selected on the basis of specialist knowledge of the screen industries sector. The purpose of this scoping study was to identify the SIC codes under which such companies self-report to Companies House, the basis for ONS data. The study revealed that these companies report under 30 creative industries SIC codes, as well as a range of non-creative industry SIC codes representing supply chain businesses (including catering and transportation). This index of 30 SIC codes was used to generate the first list of company names (the SIC List) and was applied to all subsequent standard industry classification data analyses across both SIC and RSIC datasets. A second list was then produced using The Data City's Real-time Standard Industry Classification Codes (RSICs). Unlike self-reported ONS SIC codes, RSICs are derived from web-scraping, offering a higher degree of accuracy in allocating industry classifications to company profiles. The Data City's methodology also permits the allocation of multiple SIC codes to a single company, better capturing the reality of

businesses operating across multiple supply chains. A third list was compiled using The Data City's Real-Time Industry Classification (RTIC) categories, which reflect contemporary clusters and supply chains emerging from recent rapid technological change, applied across the nine West London boroughs. Company names from all three lists were added manually to produce the final CIC. The CIC will be made available to West London Business for ongoing annual monitoring of growth, innovation, PAYE employment, and skills. The RTICs used for the creation of the third list were: Advanced Screens (all); Digital Creative industries – Advertising, Film/TV, Gaming, Music, Photography, Streaming, Visual and Performing Arts; Gaming (all); Immersive Technologies (all); Telecommunications (broadcasting); Streaming economy (all); Media and Publishing – Video and Motion Graphics Production, Broadcasting Services, Sound and Music Production; Agency Market – creative, social media; AdTech – publishers, advertisers, programmatic platforms.

[6] In November 2024, 450 member companies were surveyed. 79 companies replied. Two of the 16 companies reported a code normally associated with feature film and documentary production: 90030 Artistic Creation. Five of the 16 companies report under 82990 Other Business Support Service Activities Not Elsewhere Classified. Thus, almost half of the film production companies are not reporting under Motion Picture codes in 59 despite being wholly engaged in film production for Film, TV, and cinema.

## Glossary

ABS – Annual Business Survey  
APA – Advertising Producers’ Association  
AVOD – Advertising Video on Demand  
BECTU – Broadcasting, Entertainment, Communications and Theatre Union  
BFI – British Film Institute  
CIC – Cluster Industry Classification  
CoSTAR – Convergent Screen Technologies and Performance in Realtime  
CPM – Cost per Mille  
Creative PEC – Creative Industries Policy and Evidence Centre  
DCMS – Department of Culture, Media and Sport  
EIS – Enterprise Investment Scheme  
EVCOM – Event and Visual Communication Association  
GVA – Gross Value Added  
HD – High Definition  
HDR – High Dynamic Range  
HETV – High End TV  
HMRC – His Majesty’s Revenue and Customs  
HR – Human Resources  
IBDR – Inter-Departmental Business Register  
ICVFX – In Camera Visual Effects  
IFTC – Independent Film Tax Credit  
IMAG - image magnification used in the audiovisual production industry  
IWGB – Independent Workers Union of Great Britain  
LED – Light Emitting Diode  
LFS – Labour Force Survey  
NFTS – National Film and Television School  
ONS – Office of National Statistics  
OPDC – Old Oak and Park Royal Development Corporation  
PACT – Producers Alliance for Cinema and Television  
PAYE – Pay As You Earn  
PR – Public Relations  
PSB – Public Service Broadcasting  
RPM – Revenue per Mille  
RSIC – Real-time Standard Industrial Classification  
RTIC – Real-time Industrial Classification  
SFX – Special Effects  
SIC Code – Standard Industrial Classification Code  
SOC Code – Standard Occupational Classification Code  
SVOD – Subscription Video on Demand  
THE DATA CITY – The Data City  
TVOD – Transactional Video on Demand  
UKIE – UK Interactive Entertainment  
UKRI – United Kingdom Research and Innovation  
VAT – Value Added Tax  
VFX - Visual Effects  
VP – Virtual Production

VR – Virtual Reality  
WLA – West London Alliance  
WLB – West London Business  
WLO – West London Orbital  
XR – Extended Reality  
YPP – YouTube Partners Programme

## **Photo Credits**

COVER – Met Film School @2026  
INSIDE COVER - Met Film School @2026  
PAGE 9 – Garden Studios 2025  
PAGE 16 – MARS Studios  
PAGE 41 – [Kyle Loftus](#), Unsplash  
PAGE 50 – Garden Studios 2025  
PAGE 66 – Versa London Studios  
PAGE 89 – [Jakob Owens](#), Unsplash  
PAGE 96 – Brands&People, Unsplash

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