

Media release

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West London is the UK's "hidden engine" of screen production

New research authored by Professor Emily Caston presents West London as the strategic heart of Britain's convergent screen industries, coordinating commissioning, finance, post-production, VFX, studios and specialist suppliers that enable productions across the UK. Launched last week at Ealing Studios, the report *'West London Screens: The Hidden Engine of the UK's convergent screen industries'* presents the sub-region's screen cluster as a resilient, 125-year-old industrial ecosystem whose dense supplier networks and mobile freelance labour underpin national screen output.

A creative cluster which is home to over 6,000 companies that generate over £70 billion in turnover - West London emerges in the report as a clear strategic national hub, whether through local filming for shows such as *Bridgerton*, *The Rings of Power* or *The Crown*, or to enable regional production infrastructure across the country, supporting other creative and screen hubs alongside elevating West London's own position on the global stage.

The report notes:

- West London accounts for 34% of London's screen enterprises and 14.5% of the national total.
- GVA per employee of £71,773 signals high-value activity.
- The cluster faces a deepening freelancer crisis, acute place-pressure from rising costs and residential conversion (threatening Soho's post-production and VFX capacity), and structural exposure to international tax-incentive competition and US commissioning volatility.
- More support is needed in the development of new talent and skills for graduates.

Many of West London's individual boroughs boast a rich creative history, with industry innovators such as Kodak, Canon, EMI (HMV) and Sky to name but a few, having all been or currently are headquartered in the subregion.

The study shows how major studios and streamers based in West London channel billions through local production companies and post-production houses, enabling shoots and supply-chain activity nationwide, rather than competing with regional hubs.

The report sets out **seven strategic recommendations** to secure the cluster as national infrastructure:

1. West London should seek formal recognition as a distinct screen industries cluster within the Film London region, deepening collaboration with Film London and the British Film Commission.
2. The 'Elizabeth Line Screen Spine' (connecting Heathrow to Park Royal, Soho and Stratford) offers a once-in-a-generation opportunity to consolidate the cluster's spatial coherence.
3. Explore introducing two-levels of filming permit fee structure, offering concessionary rates to productions qualifying for the Independent Film Tax Credit (IFTC). Complementing this, West London Business should coordinate a cluster-wide supply chain discount scheme for IFTC-qualifying productions, encompassing studios, camera hire, costume houses, transportation and post-production.
4. Workforce support from technology and workflow workshops to a structured CPD programme to subsidised co-working spaces for freelancers.
5. Skills development for new entrants demands attention to the parts of the supply chain that fall outside standard creative industries classifications.
6. Heritage and identity should be physically embedded across the cluster through coordinated wayfinding.
7. Research and innovation funding should be coordinated through a formal West London Screen Innovation Consortium linking the University of West London, Royal Holloway, Brunel and Middlesex University, supported by a Screen Research Hub providing continuous cluster monitoring.

Professor Emily Caston, Director, PRISM, University of West London, said of the report: *"Until now, the true scale of West London's screen industries has never been fully mapped. This report reveals a convergent ecosystem of extraordinary depth and reach — spanning film, TV, advertising, games, live events, postproduction and visual effects — that is shaping screen culture globally. Its economic weight demands serious attention from investors and policymakers alike."*

Cllr Peter Mason, Leader of Ealing Council, said:

"Our borough has historically played an outsized role in the sector thanks to Ealing Studios, the oldest continuously working film studio in the world, and its outstanding new facilities. It is one of the reasons why the wider west London region is firmly established as a global film and TV destination and a national centre for the industry's supply chain. It has delivered good quality jobs for our residents for decades."

"Professor Caston's research shows that this is just the start, with west London primed to lead the way with film and TV for decades to come. We will continue to work with other boroughs, the Old Oak and Park Royal Development Corporation, and businesses to support the industry to flourish even more and continue to deliver good jobs for local people."

Cllr Tom Bruce, Deputy Leader of Hounslow Council and Cabinet Member for Regeneration and Development, said:

"West London is one of the UK's most important centres for the screen industries, and Hounslow is proud to play a key role in that success. Our borough is home to a growing cluster of TV, film and digital media businesses, particularly along the Golden Mile London, which is a major focus for regeneration and investment."

"We are committed to supporting the creative industries as a key engine of growth for Hounslow — creating skilled jobs, supporting local businesses and strengthening our cultural economy. Our recent reaccreditation as a Creative Enterprise Zone reflects that commitment"

and will help us continue to develop the infrastructure, skills and opportunities that allow the sector to thrive locally and across West London."

Cllr Steve Tuckwell, Hillingdon Council's Cabinet Member for Planning, Housing and Growth, said: *"We're proud of the borough's screen industry presence and heritage with major sector leaders already based here, such as IMG creating global sports entertainment, West London Film studios, and the MARS Volume, leading the way in virtual production for Amazon, Netflix and Apple, while Heathrow Airport provides the industry with unrivalled global connectivity."*

"Hillingdon is open for business and we're committed to helping the industry grow by unlocking developments, creating new opportunities, and ensuring local residents are equipped with the right skills to access high quality jobs in the sector."

Matthew Carpen, Chief Executive, Old Oak and Park Royal Development Corporation said:

"This research shines a light on the scale and importance of West London's film industry - driving jobs, innovation and global influence. As we progress our plans for regeneration across Old Oak and Park Royal, our vision for the area supports the continued growth of this sector, while creating exciting career paths for local people."

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Notes to editors

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Emily Caston is a Professor of Screen Industries at the University of West London and a leading scholar of British music video, screen advertising, and the UK's wider screen-production ecology. Before academia, Caston spent over a decade as a producer with her dual background giving her a rare insider-scholar perspective on the UK media production landscape.

The study covers nine boroughs: Barnet, Brent, Ealing, Hammersmith & Fulham, Harrow, Hounslow, Hillingdon, Kensington & Chelsea and Westminster.

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