Umulkhayr Mohamed during the filming of Find Your Future in Film and TV campaign© ScreenSkills, photo by Huw Jones

Quarterly ScreenSkills Barometer

November 2019

QB4: July 2019 – October 2019

Acknowledgement

We thank all panel members who participated in this research. Please see the introduction for the list of participants that agreed to be mentioned in the report. This research is supported by the BFI, awarding National Lottery funds, as part of its Future Film Skills strategy.

Executive summary

Business activity across the screen industries

- Recent gross domestic product (GDP) figures reveal that the film and television industries have been outperforming the service sector as a whole over the last two years.
- High-end television production is at its highest level since the introduction of the tax relief and cinema-going over the summer set a new box office record.
- 36% of Barometer respondents state that business activity has increased in the last quarter while 44% perceive it as having remained constant.
- Growing domestic and international demand, access to finance and the exchange rate were identified as significant factors supporting growth across the industry.
- However, the uncertainty around Brexit and the limited availability of skilled workers are identified as major factors hindering growth.

Recruitment challenges

- 47% of respondents felt that the level of recruitment activity had increased over the last quarter with just over one third (36%) stating it had not changed.
- Almost two thirds (64%) of those surveyed suggested it was difficult to recruit, with respondents highlighting difficulties in filling a wide range of roles. Skills shortages form a serious or very serious problem for 57% of participants who reported recruitment difficulties.
- Respondents identified a number of different causes for these recruitment difficulties, most prominently competition from inside the sector (78%) and a small pool of applicants with the required skills (74%).
- Ongoing recruitment difficulties had a number of consequences, primarily wage inflation and increased operating costs and an impact on the ability to meet deadlines.

Skills gaps

- Three quarters of respondents are aware of skills gaps among the existing workforce.
- Skills gaps are causing serious or very serious problems according to almost half of the panel (48%).
- In terms of general skills gaps, 70% of respondents identify managerial and leadership skills as the major concern. Other areas include financial skills and the ability to work to a budget and project management, planning and organisational skills.
- The two most commonly cited causes for skills gaps among the workforce are the inability of employers to recruit staff with the required skills and employees being too inexperienced in their role.

Future outlook

- The Barometer survey finds that 44% of respondents are optimistic about the future growth of the screen industries, an increase on the figure recorded in the last quarterly study.
- Increased demand, new commissions, the relocation of parts of Channel 4 to Leeds and the launch of the Young Audiences Content Fund were identified as positive factors affecting the industry in the next quarter.
- Brexit, the availability of skilled workers and studio/stage capacity are expected to have a negative impact on the sector's short-term prospects.
- 47% of respondents think that recruitment activity will increase in the next quarter while 35% expect there to be no change.

Responding to skills challenges

- Almost three quarters (74%) of Barometer respondents highlight the importance of bursaries to support traineeships, internships or work placements. Other actions identified to help address skills challenges include improvements to the relevance and quality of educational and vocational training, including apprenticeships (59%) and improved careers education, advice and guidance (53%).

1. Introduction

The Quarterly ScreenSkills Barometer is based on an online survey, undertaken between September and October 2019, targeting organisations that fall within the following subsectors of the UK screen industries: animation, children's TV, film, games, high-end TV, unscripted TV and VFX.

Panel composition

The Barometer aims to collect around 50 responses from industry experts each quarter[1] and on this occasion 43 panellists participated in the research, up from 34 in the previous quarter. Figure 1 shows a breakdown of participants per subsector.

Figure 1: Participants in the fourth Barometer Survey (n = 43)

Participants			
Animation	4	High-end TV	15
Children's TV	6	Unscripted TV	2
Film	10	VFX	3
Games	3		

The 35 participating organisations which agreed to be mentioned in the report are listed below (figure 2). The remainder prefer to remain anonymous.

Figure 2: Participants in the Barometer Survey, QB4

Participants		
Aardman	ITV Studios	Space Studios/Screen Manchester
Axis Studios	Lupus Films	Studio Lambert
BBC	Mammoth Screen	The Bureau
BECTU Vision	Netflix	The Other Planet
Big Light Productions	Northern Ireland Screen	The Production Guild
CMI	Outpost VFX	Three Stones Media
Darbotron	Pathé Productions	Tiger Aspect
Event Cinema Association	Queen's Film Theatre	Two Brothers
Framestore	S4C	Ubisoft Reflections
Glasgow Film	Screen Yorkshire	Viacom: Nickelodeon & Milkshake! UK
Green Dragon Media	Showroom Workstation	Warp Films
Independent Cinema Office	Sister Pictures	

Industry participation

We are always looking for new Barometer panellists who are eager to share their experience and concerns with the industry. Please take 15 minutes to contribute to our research and help us guarantee the ongoing success of the sector. Your contribution is absolutely vital to our work and the wider screen industries, because the insights generated by the Barometer are used to inform investment and policy decisions, as well as talks with industry, training providers, educators and the Government.

If you wish to participate, please get in touch with Caterina Branzanti (Head of Research) via Caterina.Branzanti@screenskills.com

Report structure

Chapter 2: assesses business activity across the UK screen industries;

Chapter 3: considers recruitment difficulties and skills shortages in the sector;

Chapter 4: explores evidence of skills gaps amongst the existing workforce;

Chapter 5: considers expectations for change over the next quarter; and

Chapter 6: discusses perspectives on how the sector could be responding to skills challenges.

[1] See appendix A for more information on the methodology underpinning the Quarterly ScreenSkills Barometer.

2. Business activity across the screen industries

Headlines:

- **Latest figures from the ONS highlight the contribution of the service sector, and film and television in particular, in growing UK GDP in the three months to August 2019.**
- **Key industry data on film and high-end television production and cinema-going for the first half of the year also paint a positive picture.**
- **36% of Barometer respondents state that business activity has increased in the last quarter with 44% perceiving it as having remained constant.**
- **The continued strength of the domestic market, as well as the availability of financial resources, were identified as significant factors supporting growth across the industry.**
- **However, Brexit, economic uncertainty and the limited availability of skilled workers are identified as major factors hindering growth.**

UK economic and labour market conditions

The latest gross domestic product (GDP) estimate from the Office for National Statistics (ONS) shows that the UK's GDP grew by 0.3% in the three months to August 2019 (ONS, 2019a). The main contributor to GDP growth was the services sector, which grew by 0.4%, and film and television production was specifically identified as a sector of the economy which has significantly outperformed services as a whole over the last two years.

The most recent labour market overview for the UK, covering the period June to August 2019, shows that the UK employment rate was estimated at 75.9%, higher than a year earlier (75.6%) but 0.2 percentage points lower than the previous quarter (ONS, 2019b). For July to September 2019, there were an estimated 813,000 vacancies in the UK, 11,000 fewer than the previous quarter (April to June 2019) and 34,000 fewer than for the previous year.

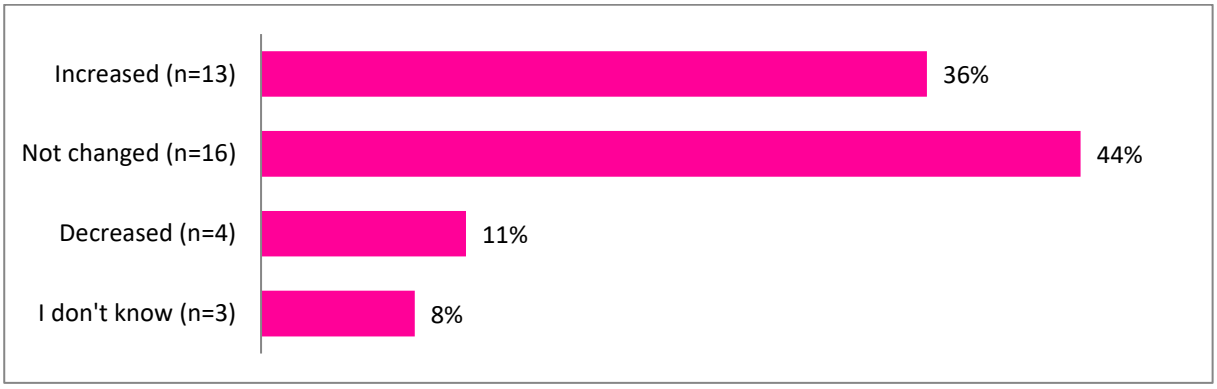
Overall, the Bank of England Monetary Policy Committee noted in its September report that Brexit uncertainties have continued to weigh on business investment and the weaker global backdrop is impacting exports (Bank of England, 2019). These factors mean the economy could follow a wide range of paths over the coming years.

Business activity in the UK screen industries

Recent data on the health of the UK screen industries suggest that business activity remains relatively buoyant. Half-year production statistics produced by the BFI revealed that £737 million was spent on UK high-end television production in the first six months of 2019, the highest figure reported since the introduction of the high-end television tax relief in 2013 (BFI, 2019). UK cinemas saw their highest summer box office returns on record - from May to August, the total box office was over £474 million, up 7.8% on the same period in 2018 (UK Cinema Association, 2019).

Participants in the fourth wave of the Quarterly ScreenSkills Barometer largely reinforce this view, with the vast majority of respondents (80%) stating that business activity increased or remained stable between July and September 2019. Only 11% believed that it had decreased (figure 3).

Figure 3: Perception of level of business activity between July and September 2019



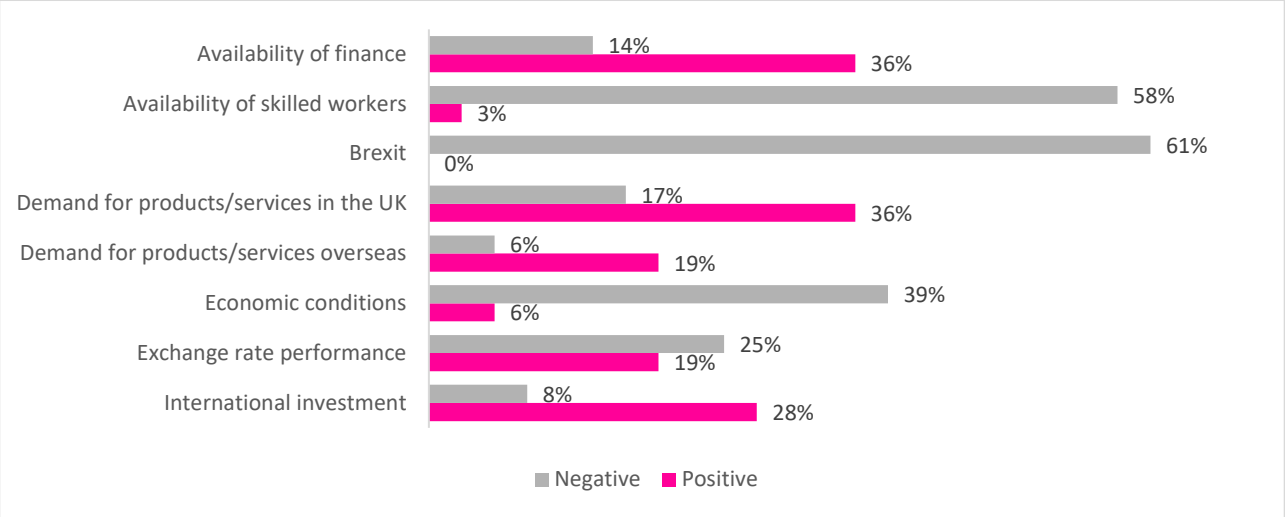
Q = What's your view on the level of business activity across the screen industries over the last three months? (n = 36)

Positive factors

As reported in figure 4 below, participants consider the positive effect of a strong domestic demand for products and services and the availability of finance (both 36%) as the main factors contributing to the growth or stability of business activity over the last three months. This is followed by international investment (28%), exchange rate (19%) and international demand for products and services (19%).

Several respondents from film and high-end television cited the respective tax reliefs which are "stable and understood" and the positive impact of the UK's overall reputation as a production centre.

Figure 4: Perception of factors affecting business activity in the past quarter



Q = How do you view the effect of the following factors on the level of business activity across the screen industries during the last three months? (n = 36)

Negative factors

Brexit continues to be perceived as the main negative factor affecting business activity in the screen industries over the past quarter. Over three-fifths (61%) of respondents thought that the ongoing economic and political uncertainty adversely affects business activity. The lack of availability of skilled workers is the next most mentioned negative factor (58%). Pressure on UK crews has increased hire costs significantly and there are fewer skilled individuals to hire. One panellist reported that the inability to find sufficient experienced film making labour is hugely problematic and there is a growing trend of losing crew to more lucrative projects. In turn, the available talent pool is topped up with insufficiently experienced crew which may have a negative impact on the UK's reputation as a place of excellence.

The lack of suitable studio and stage space was also mentioned by several respondents, with concerns that lack of infrastructure, as well as skills, may inhibit growth.

Finally, there was a degree of uncertainty around the commissioning requirements of some of the new streaming platforms, with a specific concern that some companies were no longer commissioning children's content for international sales.

3. Recruitment challenges

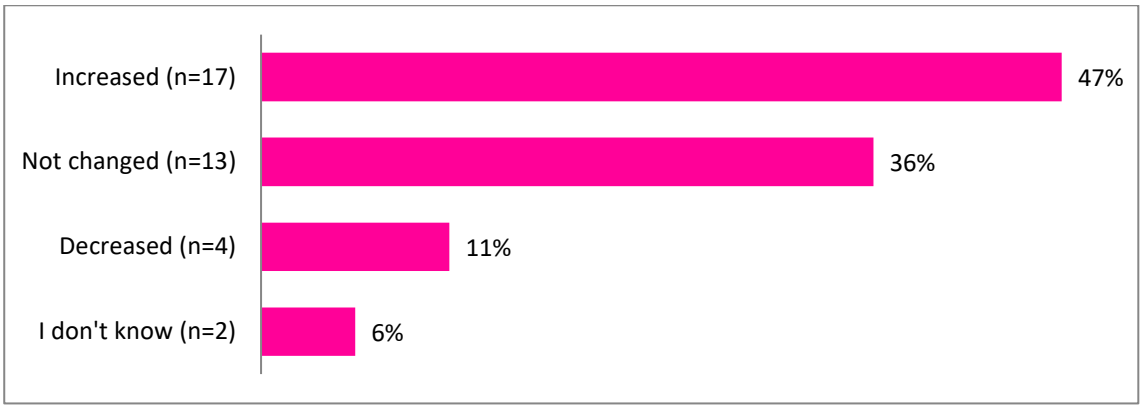
Headlines:

- **Almost half (47%) of respondents felt that the level of recruitment activity had increased over the last quarter while 36% believed it had remained stable.**
- **64% of those surveyed were aware of recruitment difficulties over the last three months, with respondents highlighting difficulties in filling a wide range of roles.**
- **Skills shortages form a serious or very serious problem for 57% of participants who reported recruitment difficulties.**
- **Panellists identified a range of different causes of skills shortages, most significantly competition from inside the sector and the low number of applicants with the required skills.**
- **Consequences of skills shortages include wage inflation, increased operating costs and difficulties meeting deadlines.**

Recruitment activities

Figure 5 shows the perception of change in recruitment activities between July and September. While 47% of respondents stated that they perceived an increase in the level of activity, 36% did not think there had been any changes. Only 11% of panellists reported a decline in recruitment activity.

Figure 5: Perception of changes in the level of recruitment activity in the past quarter

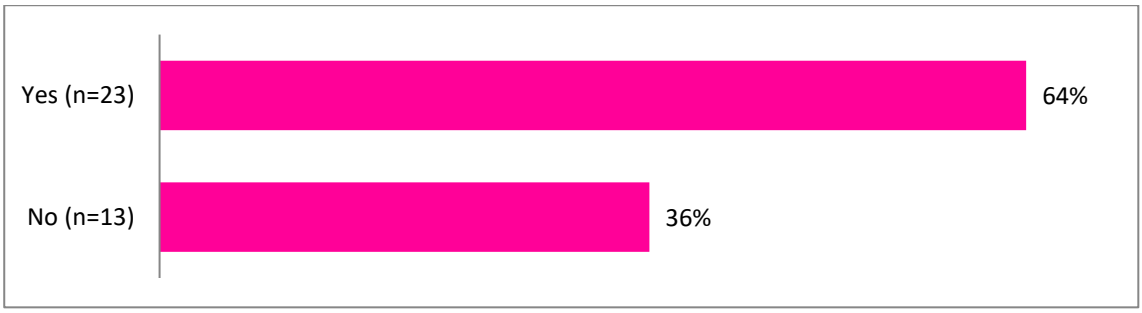


Q = In the last three months do you think that the level of recruitment activities has:.. (n = 36)

The extent of recruitment difficulties

Almost two thirds (64%) of respondents were aware of recruitment difficulties over the last three months (figure 6). As reported in the last ScreenSkills Barometer, this is broadly in line with recent findings from The Open University's business barometer (2019), which estimated that 63% of organisations across the UK economy are currently experiencing skills shortages. This is when employers find it difficult to find the skills, qualifications and experience they need when recruiting, signifying an external skills mismatch between the demands of the screen industries and the availability of suitable labour.

Figure 6: Recruitment difficulties in the past quarter

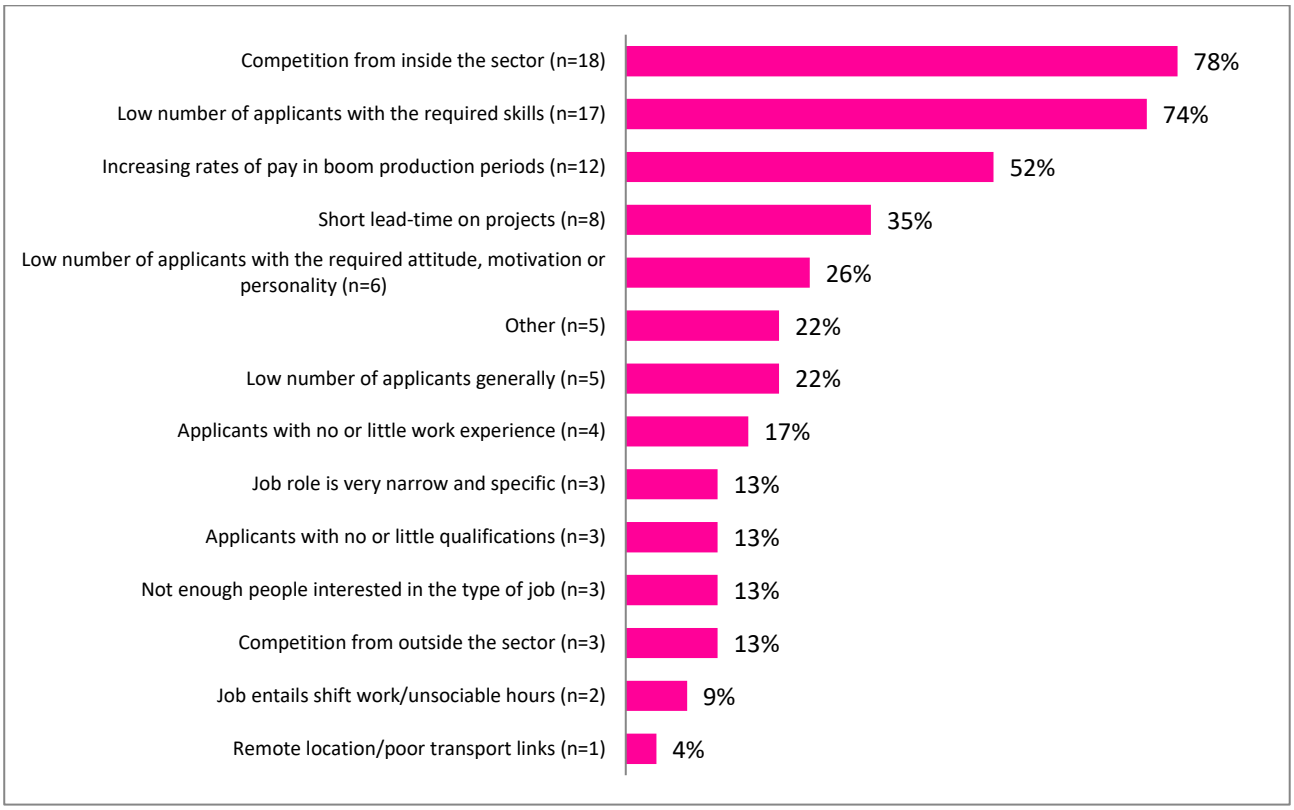


Q = Are you aware of any recruitment difficulties in the last three months? (n = 36)

Causes of recruitment difficulties

Of those respondents who experienced recruitment difficulties between July and September, the vast majority (78%) reported that these issues were caused by competition from within the sector (figure 7)[2]. Low numbers of applicants with the required skills to do the job (74%) and increased rates of pay during peak production periods (52%) were also perceived as problematic. Shorter lead-time on projects, reflecting the high volume of production activity in the UK, was identified by just over one third of respondents (35%).

Figure 7: Perception of the main causes of recruitment difficulties in the past quarter



Q = What were the main causes of these recruitment difficulties? (n = 23) **Note: this question was only addressed to the 23 respondents who were aware of recruitment difficulties in their subsector in the last three months. Multiple answers allowed.*

Hard-to-fill jobs

As shown in figure 8 below, respondents across the screen sector identified a range of different roles as difficult to recruit for. These include 1st assistant directors, editors, line producers, location managers, post-production supervisors and production managers in film and high-end TV, heads of production and lead digital matte painters in VFX and production accountants, production assistants, and production coordinators in both children's and unscripted TV.

[2] Respondents to the ScreenSkills Employer Survey 2019 also identified "competition from inside the sector" as the primary cause of recruitment difficulties. For more information, please see the Annual ScreenSkills Assessment (ScreenSkills, 2019b).

Figure 8: Jobs hard to recruit for[3]

Film	
1st assistant director Art director Assistant accountant Assistant coordinator Assistant location manager Cinematographer Edit assistant Editor Financial controller Gaffer	Guest services manager Line producer Location manager Marketing officer Post-production supervisor Production accountant Production coordinator Production manager Project manager Training manager Unit production manager

VFX	
Compositor Creature FX technical director (all levels) Executive producer Experienced digital matte painter	Experienced environment technical director Head of production Graphics software developer Virtual production manager

High-end TV	
1st assistant director Accounts assistant Assistant production accountant Director Editor Electrician Finance controller Grip (all levels)	Line producer Location manager Post producer Post-production supervisor Producer Production accountant Production manager Prop hand VFX supervisor

Animation	
Animators (2D traditional high-end) Assistant animators/clean-up artists (2D traditional high-end) Character FX artist Creative director Creative producer Head of production	Layout artist (2D traditional high-end) Pipeline technical director Previz Production coordinator Rigging technical director Story artist Storyboard artist Writer

Unscripted TV	
Casting researcher Editor Edit assistant Production accountant	Production assistant Production coordinator Production manager Production secretary

Children's TV	
1st assistant director 2nd assistant director Assistant editor Assistant production accountant	Location manager Production accountant Production coordinator Production secretary Prop buyer

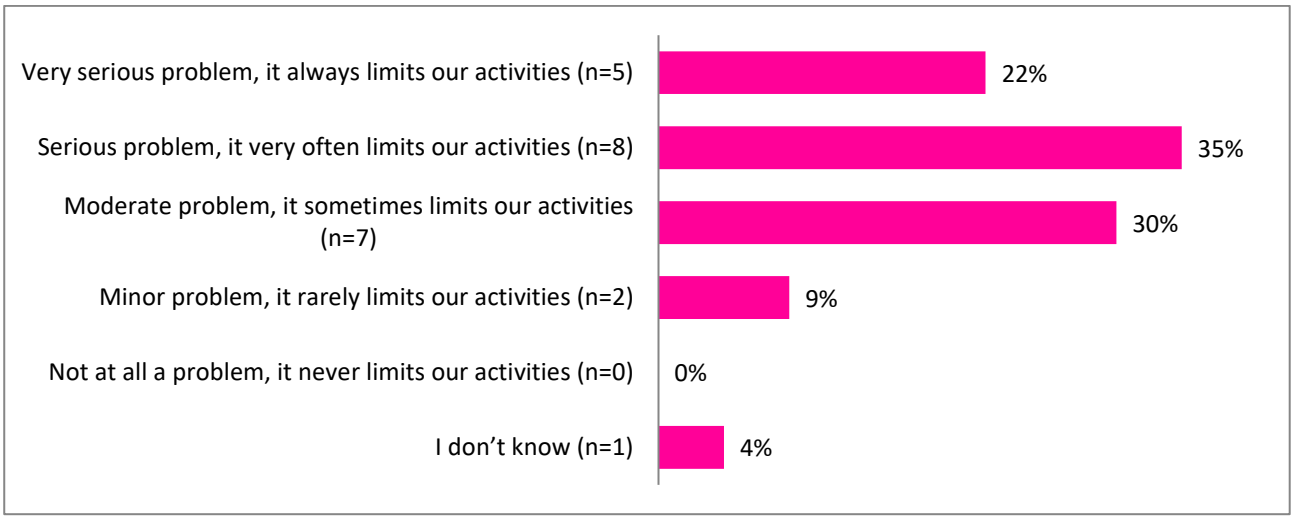
Severity of recruitment difficulties

More than half of respondents aware of the issue (57%) considered recruitment difficulties a serious or very serious problem that very often or always limits activities, while a further 30% of the sample perceived it as a moderate issue (figure 9).

[3] Since no participants from games contributed to this section of the Barometer, we are unable to identify hard-to-fill job roles for this subsector.

For additional hard-to-fill job roles identified through our research, see the Annual ScreenSkills Assessment (ScreenSkills, 2019a).

Figure 9: Views on the impact of recruitment difficulties in the past quarter

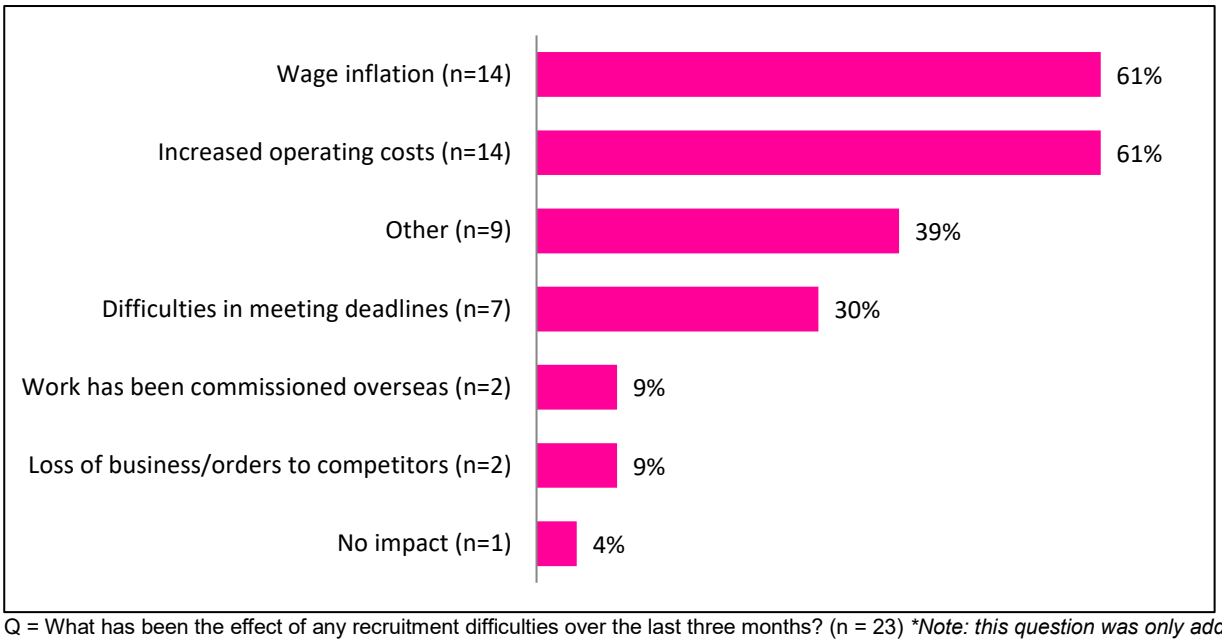


Q = How severe do you consider the problem of recruitment difficulties related to lack of relevant skills, qualifications or experience over the last three months? (n = 23) **Note: this question was only addressed to the 23 respondents who stated they were aware of recruitment difficulties in their subsector over the past three months.*

Consequences of recruitment difficulties

According to the panellists, the two primary effects of recruitment difficulties are wage inflation (61%) and increased operating costs (61%). Three in 10 respondents also reported difficulties in meeting deadlines as a result of job roles being hard to fill (figure 10).

Figure 10: Views on the consequences of recruitment difficulties in the past quarter



Q = What has been the effect of any recruitment difficulties over the last three months? (n = 23) **Note: this question was only addressed to the 23 respondents who stated they were aware of recruitment difficulties in their subsector(s) over the past three months. Multiple answers allowed.*

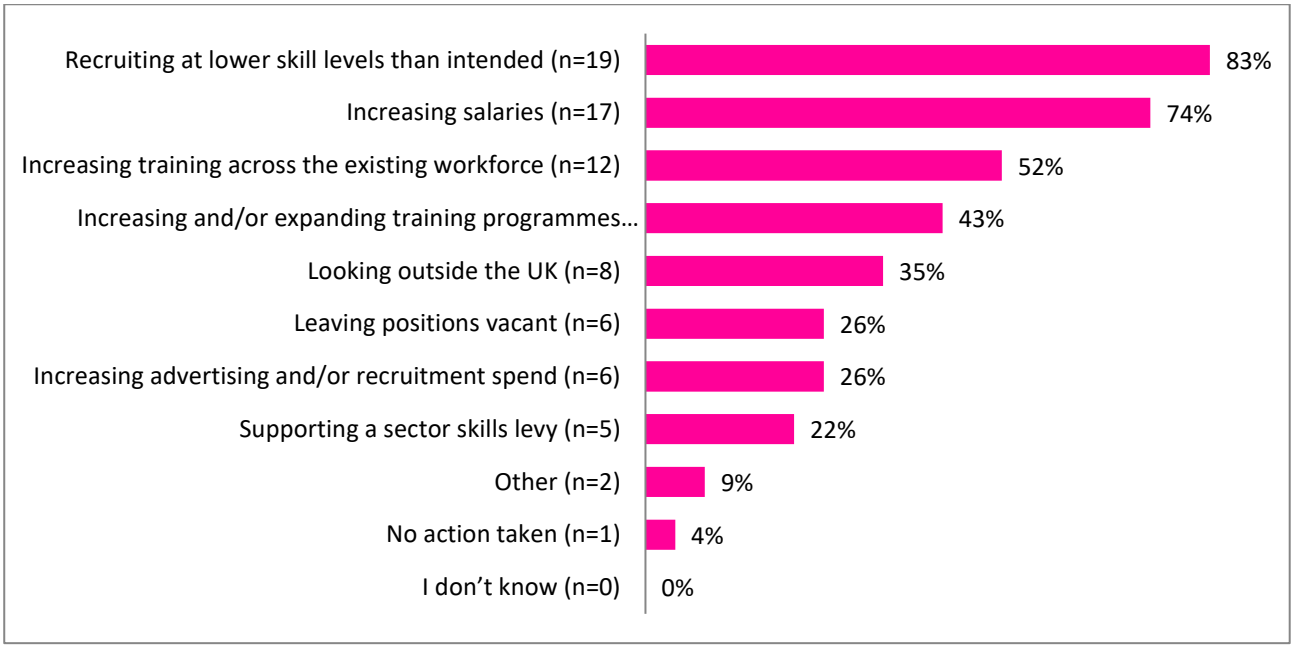
A smaller number of panellists reported that recruitment difficulties had led to work being commissioned outside the UK and a loss of business to competitors.

Actions taken to tackle recruitment difficulties

Between July and September, companies have taken a range of actions to tackle recruitment difficulties (figure 11). Most commonly, respondents stated that they have recruited at lower skills levels than initially intended (83%), which may create knock-on effects. Other actions include increasing salaries to fill vacancies (74%) and increasing training investment across the existing workforce (52%). More than a third of

panellists looked outside the UK for suitable talent while over a quarter of respondents were forced to leave positions vacant. Just over one fifth of respondents (22%) had supported a sector skills levy[4],

Figure 10: Actions taken in the past quarter



Q = What actions have employers taken to overcome any recruitment difficulties in the last three months? (n = 23) **Note: multiple answers allowed.*

[4] Supporting a sector skills levy means contributing to one of the ScreenSkills Skills Funds for animation, children's television, film, high-end television or television.

4. Skills gaps

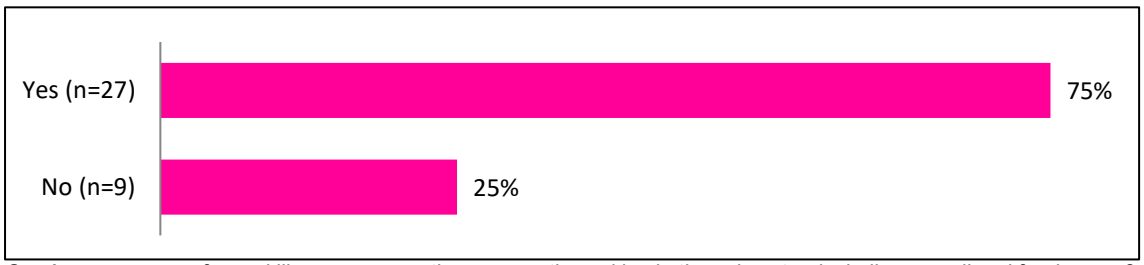
Headlines:

- **75% of respondents are aware of skills gaps among the existing workforce.**
- **Almost half of the panel (48%) say that skills gaps are causing serious or very serious problems which limits activities.**
- **In terms of general skills, the lack of management and leadership skills is the most commonly reported (70%). Respondents also identified a range of other gaps such as financial skills, project management and planning and organisational skills.**
- **The two most commonly cited causes for skills gaps among the workforce are the inability of employers to recruit staff with the required skills and employees being too inexperienced in their role.**

The extent of skills gaps

The increased demand for UK-produced screen content, coupled with a lack of skilled workers in the external labour market, continues to have an impact on the sector. In addition to the external skills mismatch described in section 3, there are also internal skills gaps pertaining to the suitability of current employees and freelancers. Three-quarters of respondents reported they are aware of skills gaps in the existing workforce[5] (figure 12).

Figure 11: Perception of skills gaps amongst the existing workforce in the past quarter

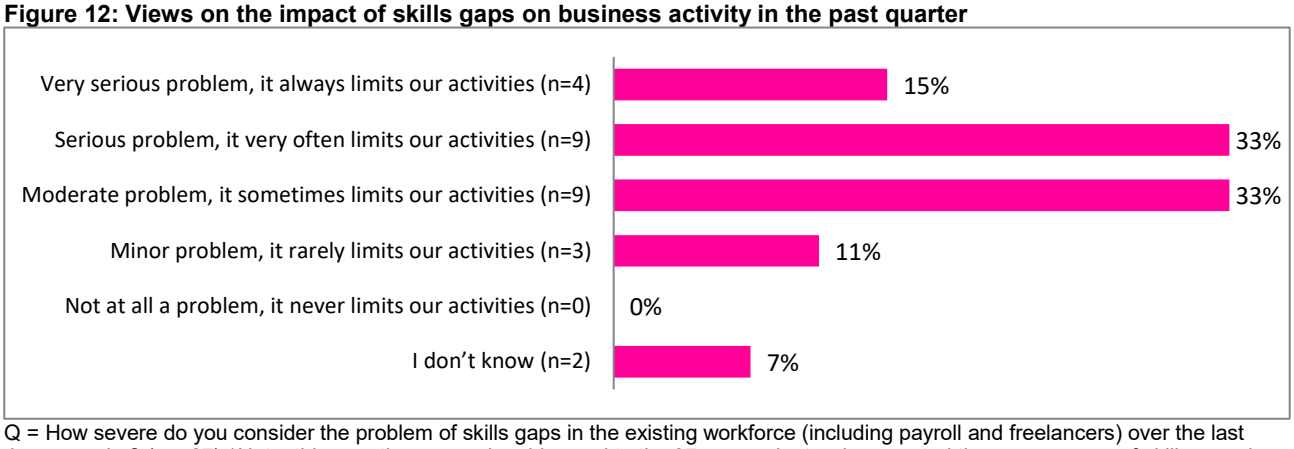


Q = Are you aware of any skills gaps among those currently working in the subsector, including payroll and freelancers? (n = 36)

The severity of skills gaps

Almost half (48%) of respondents consider skill gaps a serious or very serious problem that always or very often limits activity in the sector (figure 13). One third of panellists consider skills gaps to be a moderate problem.

Figure 12: Views on the impact of skills gaps on business activity in the past quarter



Q = How severe do you consider the problem of skills gaps in the existing workforce (including payroll and freelancers) over the last three months? (n = 27) **Note: this question was only addressed to the 27 respondents who reported they were aware of skills gaps in the current workforce.*

[5] For a more in-depth analysis of skills gaps, see the Annual ScreenSkills Assessment (ScreenSkills, 2019a).

The nature of skills gaps

In terms of general skills, the most commonly reported gaps continue to be managerial in nature, with seven in 10 respondents stating that the workforce lacks management and leadership skills (figure 14).

A further 56% of panellists believed that the workforce lacks financial and budgeting skills, while around half stated that workers lack project management (52%) and planning and organisational skills (48%). A third of respondents stated that resilience is also a skills gap in the existing workforce.

Figure 13: Views on general skills gap in the existing workforce in the past quarter

Q: Which of the following skills are lacking in the existing workforce, including payroll and freelancers? (n = 27) **Note: multiple answers allowed.*

The causes of skills gaps

The panellists identified a range of causes for skills gaps among the existing workforce (figure 15).

Two thirds (67%) of Barometer panellists stated that employers are unable to recruit staff with the required skills and over three fifths (63%) think that inexperienced workers are a significant cause of skills gaps among the existing workforce. Another 56% of respondents think that many workers have not received appropriate training and are therefore unable to fully perform their tasks.

Figure 14: Views on the main causes of skills gaps

	n	%
Employers are unable to recruit staff with the required skills	18	67
Workers are new to the role	17	63
Workers have not received the appropriate training	15	56
Employers face problems retaining staff	7	26
The introduction of new working practices	6	22
Workers are still receiving training	5	19
The development of new products and services	3	11
Workers lack of aptitude to do job/reached maximum potential	3	11
Workers lack motivation	2	7
Workers have been on training but their performance has not improved sufficiently	1	4
Other	4	15

Q: What were the main causes of skills gaps? (n = 27) **Note: multiple answers allowed.*

The pattern of response continues to depict a cyclical problem in which employers are unable to recruit suitable staff and are then forced into hiring inexperienced or unqualified workers. This in turn exacerbates the skills gaps and potentially weakens the ability of the UK screen sector to meet the growing domestic and international demand for high-quality screen content.

5. Future outlook

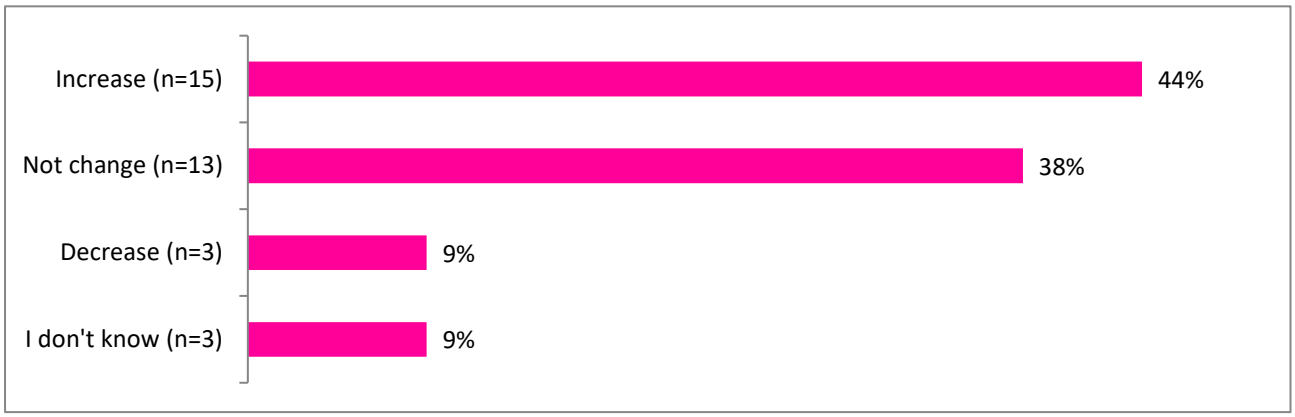
Headlines:

- **44% of respondents expect the level of business activity to increase over the next three months.**
- **Increased demand, new commissions, low exchange rate, the relocation of parts of Channel 4 to Leeds and the launch of the Young Audiences Content Fund were all identified as positive factors affecting the industry in the next quarter.**
- **The uncertainty around Brexit and the ongoing lack of skilled workers in key areas are expected to have a negative impact on the sector's short-term prospects. Studio and stage capacity is another concern for panel members.**
- **Almost half (47%) of respondents expect recruitment activity to increase over the next quarter. Another 35% expect the same level of activity with only 12% anticipating a decline.**

Business activity

More than four in 10 (44%) panellists expect business activity to increase during the next quarter and only 9% of respondents believe business activity will decrease (figure 16).

Figure 15: Future expectations for business activity in the screen industries



Q: How do you expect the level of business activity will change in the next three months? Will it: (n = 34)

Positive factors

Respondents identified a wide range of positive factors, which is in line with the generally optimistic perception about the future of the industry.

Panellists anticipate further demand for content from domestic and international markets, inward investment from major streaming services and new commissions from public service broadcasters.

Respondents from VFX and unscripted TV highlighted that the relocation of Channel 4 is leading to increased activity in Leeds and West Yorkshire and panellists involved in children's television cited the importance of the new Young Audiences Content Fund and renewed S4C commitment to children's programming.

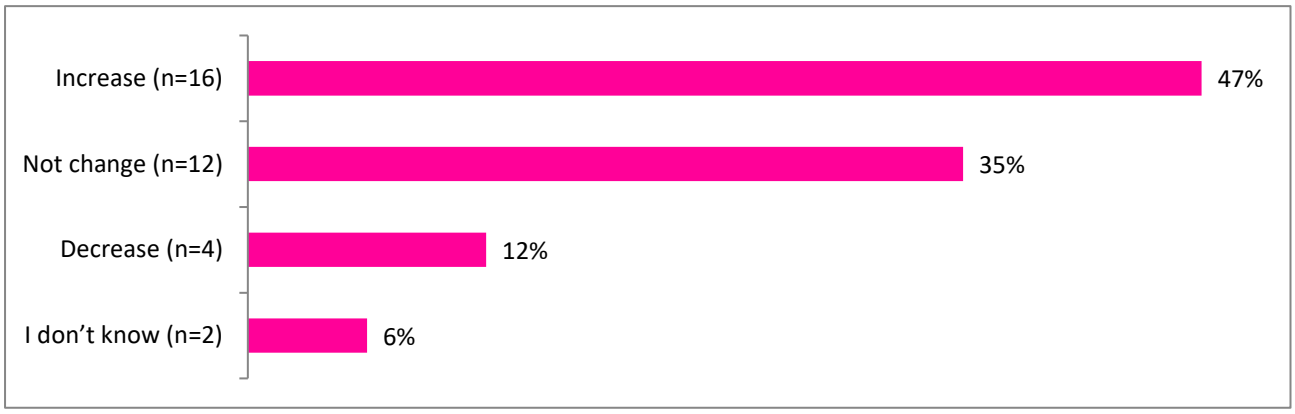
Negative factors

The ongoing uncertainty over Brexit is again identified as the most important negative factor affecting business activity in the screen industries over the next three months. The lack of skilled workers in key areas is also mentioned by several panellists as having a negative impact on projected business activity over the next quarter. Infrastructure capacity, as well as skills capacity, was also identified as having a potential detrimental effect on industry performance.

Labour market prospects

Despite some of the negative factors that are expected to affect the industry in the next quarter, the vast majority (82%) of respondents stated that recruitment activity will stay the same or increase in the next quarter (figure 17). Only a minority of 12% thought that recruitment activity is likely to decrease.

Figure 16: Expectations for recruitment activity in the screen industries in the next quarter



Q: How do you expect the level of recruitment activity to change in the next three months? Will it: (n = 34)

6. Responding to skills challenges

Headlines:

- **Almost three quarters (74%) of Barometer respondents highlight the importance of bursaries to support traineeships, internships or work placements.**
- **Other actions cited include improvements to the quality and relevance of education and vocational training including apprenticeships (59%) and improved careers education, advice and guidance (53%).**
- **Four in 10 said more inclusive recruitment and working practices would help to reduce skills shortages.**

Recent evidence clearly demonstrates the ongoing skills challenges affecting the screen industries, therefore we asked Barometer panellists about the steps the sector could take to address these issues.

Asked which actions could help reduce recruitment difficulties, a significant 74% of participants reported that bursaries to support traineeships, internships and work placements could offer a solution to skills shortages (figure 18). Almost three-fifths (59%) of respondents stated that improved relevance and quality of educational and vocational training including apprenticeships would help to address shortages.

Over half of respondents (53%) furthermore believed that improved careers education advice and guidance is an essential step in reducing recruitment difficulties.

Figure 1817: Actions thought likely to help to reduce skills shortages in future

	n	%
Bursaries to support traineeships/internships/work placements	25	74
Improved relevance/quality of education and vocational training, including apprenticeships	20	59
Improved careers education, advice and guidance	18	53
More inclusive recruitment and working practices	14	41
Retraining and return-to-work schemes	14	41
More effective management and leadership training	13	38
Support for sector skills levies[6]	13	38
More employer investment in training	11	32
Better/enhanced total reward package (including pay and benefits)	6	18
Other	4	12
No action is needed	1	3
Don't know	1	3

Q = Which of the following do you think would help to reduce recruitment difficulties? (n = 34) **Note: multiple answers allowed.*

These figures once again reinforce the findings of the Annual ScreenSkills Assessment which found that nearly two-thirds (63%) of surveyed employers across the sector think that the expansion of traineeships, internships and work placement programmes could help tackle skills gaps in future (ScreenSkills, 2019a). This suggestion was closely followed by the implementation of mentoring or buddying schemes (57%), increased training spend for freelancers (53%), and increased training spend for in-house workers (49%).

[6] Levies refers to one of the ScreenSkills Skills Funds for animation, children's television, film, high-end television or television.

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Appendix A

Methodology

The method that informs the Quarterly ScreenSkills Barometer has been designed in collaboration with industry and the Work Foundation, a not-for-profit independent authority providing advice, consultancy and research on the future of work.

Sample size:

After consultation with industry it was decided to survey around 50 individuals on a quarterly basis.

This highlights a desire for frequent, up-to-date labour market intelligence to support decision-making in the short-run and reflects that the screen industries require a regular temperature check due to their dynamic and fast-changing nature.

Due to the modest size of the sample, it is possible to undertake all fieldwork required to produce a report within a three-month timeframe.

Sampling procedure:

The Quarterly ScreenSkills Barometer uses a purposive sampling technique (Etikan, Musa and Alkassim 2016). As opposed to random sampling, purposive sampling relies on the judgment of researchers to choose an appropriate sample of participants. This is particularly appropriate when trying to include people who are difficult to reach. This applies to the majority of Barometer participants because they work in very senior positions in the industry.

Originally participants were selected from the ScreenSkills database of screen industries employers and organisations. However, after the first iteration of the Barometer, we have welcomed the input of screen professionals in senior or hiring roles.

Survey:

Barometer panellists complete a 15-minute online survey each quarter. The survey inquires into business activity, recruitment challenges, skills gaps and the short-term future outlook for the screen industries.

The first Barometer survey was designed in collaboration with the Work Foundation. To reflect emerging trends and concerns in the screen industries, the design of the survey is adjusted slightly before each iteration.