



Bridgerton S2 ©Netflix

High-end Television in the UK: 2021/22 workforce research

March 2022

Acknowledgement

This research was funded by the High-end TV Skills Fund.

This research was prepared by Gideon Barker, Insight Director, Customer IQ (formerly Profundo Research and Insight).

ScreenSkills wishes to thank all those who supported and participated in the fieldwork.



High-end television in the UK 2021/22 workforce research

Summary	3
Background and objectives	4
Research method	4
Interpretation of findings	5
Context: current challenges faced by high-end TV	6
Fatigue	6
Commitment	6
Ongoing coronavirus related challenges	7
Brexit	7
Perception of US investment	7
The opportunity for training	8
Changes in the perception of skills-related issues	8
Skills-related issues	10
Increasing rates of pay	11
Stepping up too soon	11
Show-jumping	12
Skills shortages	14
Regional aspects of skills shortages	17
Skills gaps	19
Drivers of skill-related issues	22
Dealing with skills shortages and gaps	22
Lack of diversity and inclusion	23

Summary

- As with previous rounds of ScreenSkills' HETV research, the 2021/22 research consisted of an online survey with participants invited to take part in a follow-up depth interview.
- Compared to recent years, there has been a significant increase in the number of participants who perceive the skills shortage and skills gap issues as 'serious/ very serious' within HETV production in the UK.
- Not only do more participants now cite the issue as serious but there has been a shift towards both skills-related issues being perceived as 'very serious'.
- Specific grade shortages - and the need for an organisation such as ScreenSkills to tackle them - have returned to the top of the agenda among hirers and senior professionals within HETV. Conversations among interviewees corroborate the seriousness of the issue and the increased breadth of departments and grades which are now affected.
- Demand for HETV production work is the main market force leading to the skill shortage and gap, in turn driven by both a period of 'catch-up' following the lockdown of the industry due to coronavirus and a continued and increasing level of demand from US inward investment, notably from SVoD services (referred to as the streamers).
- The level of work is said to be leading to a higher level of fatigue among the workforce.
- To consider the current severity of skills-related issues as a 'covid blip' would appear to be somewhat misplaced as the subsequent level of demand appears to be ever increasing.
- The skills-related issues create a number of key challenges for HETV production including going into production with key roles unfilled, a continued level of crew jumping off a show early (or in some cases before it has started), crew stepping up, and being stepped up, before they have gained the requisite skills and experience as well as a continuing increase to rates of pay.
- HETV productions in band 2, or the lower end of band 3, appear to be in most difficulty with regards to the skills-related challenges they face due to the relative size of their budgets.

Background and objectives

ScreenSkills is the UK's industry-led skills body for the screen industries. Within its remit is the administration of the High-end TV Skills Fund. In administering the fund, ScreenSkills operates and develops strategic initiatives to tackle the skills shortages and skills gaps within the high-end TV (HETV) workforce.

The HETV team within ScreenSkills has previously identified the need to consult with the HETV workforce and industry support organisations to gather feedback on the skills-related challenges faced by the industry. This feedback has been used to inform the HETV Council and its Working Groups who then decide on where the investment funds will be deployed each year, ensuring the skills fund is spent in the areas of HETV where it is most needed and where it will have the most positive impact. Research findings from 2021/22 will inform spending in 2022/23.

Research consultations with industry have taken place annually since 2017. This report summarises findings from the fifth wave of research.

The objectives, method and scope of the research has remained consistent over time. Key objectives for the 2021/22 research were:

- To identify the key skills and grade shortages and associated issues from the HETV industry.
- To enable the HETV Skills Fund to be more strategic in its investment plans for 2022 and beyond.

Research method

As with previous years, a mixed method of research was adopted. Qualitative interviews were carried out among a sample of those working in the HETV industry. Quantitative data was collected from a pre-interview survey which included key metrics, sample profile and open-ended, opinion-based responses.

A large sample of qualitative interviews aimed to provide a higher level of detail and also ensure a large number of individuals were given the opportunity to have their say on current issues. The sample was drawn from the HETV department's UK-wide industry contacts.

- Qualitative: 40 remote video/ telephone depth (semi-structured) interviews averaging 45 minutes in length.
- Quantitative: 56 pre-interview surveys completed online.

Fieldwork took place between October 2021 and February 2022. As with the 2020/21 research, the fieldwork period was extended slightly in order to allow for the level of demand on the workforce and ensure as many people as possible could participate.

The sample consisted largely of those who were directly involved in crewing up productions, e.g., line producers, heads of production, producers with additional interviews with those in senior roles within production and those in broadcasting and support agency positions.

50% of interviews were among those based in London, 18% were based in the nations and 32% were based in an English region.

The interviews followed a very similar topic guide to previous years, consisting of top-of-mind issues, focus on skills gaps and skills shortages, drivers of skills gaps and shortages, dealing with issues and support received, perception of future skills issues.

Interpretation of findings

The findings within this report are drawn from both the quantitative survey and the qualitative interviews.

Context: current challenges faced by high-end TV

As can be seen within subsequent sections of this report, 2021/22 research is notable for a hike in the seriousness with which skills-related issues are seen among those who participated in the research.

Corroborating this point, the vast majority of interviewees cited the skills shortage issue as being 'the' key challenge currently being faced by the HETV industry. Subsequently, there were fewer contextual challenges raised during the interviews compared to previous rounds of research.

Fatigue

The current level of demand on the industry appears to be having an impact on the wellbeing of the workforce in that it is suffering a level of fatigue. The consistent and high level of demand for production work, combined with less frequent breaks between jobs and long working hours is suggested as the causes of this increased level of fatigue, described by some as:

"I would say I have experienced more fatigue this year, I think there's been less opportunities for breaks. For whatever reason. I have, I became very aware that during the course of the last production, I needed a break"

- *Line producer*

As noted in previous rounds of research, there continues to be a sense that working in HETV in the UK is overall less fun than it used to be, due to the pressure created by the level of demand.

One danger suggested for an overly fatigued workforce is that it leads to higher burn-out of crew, who may subsequently leave the industry. Anecdotally, there is a suggestion that crew do not always appreciate a need to take time off between jobs and do not fully understand they don't 'need' to work 12 months of the year.

Commitment

Perhaps linked to a sense of fatigue, there is mention of crew being less committed and passionate about the work they do, that they are more likely to see it as a job over a vocation. HETV work - as with film and TV work generally - is seen to be one in which you need drive, commitment and passion to get on and succeed.

"One of the main skills for me that's missing, you know, is really, it's a sort of personal thing, but it's integrity, and, you know, loyalty"

- *Line producer*

A lack of commitment is also evidenced by interviewees as crew being less willing to take on work that does not suit them. Examples of this include where there is a need for travel, less desirable shooting conditions and locations or perhaps staying far away from home. A reflection of a sellers' market, there is a feeling of crew now expecting to be put up or to work much closer to where they live.

“I don't think that the passion ... is present in everyone, so there does seem to be quicker exit for some and it's not just juniors”

- *Line producer*

There is a sense from interviews that there is a cohort of crew whose career within HETV has been exclusively within the recent busy period (i.e., since the introduction of High-end Television Tax Relief) and so do not appreciate the times when work was much harder to find. This appears to impact on loyalty and willingness to commit to work that is not their ideal.

Associated problems with a very busy market and a fatigued workforce are suggested to be more claims of bullying, more upset among crew and a lack of hardiness and resilience.

Ongoing coronavirus related challenges

As highlighted by interviewees, the temporary lockdown of the production industry to deal with the coronavirus pandemic created a backlog of HETV production and subsequently led to an “explosion” of demand when HETV production was back up and running. The impact of the backlog was still being felt by research participants through a shortage of crew.

Not only lockdown, the continued level of transmission of the disease and the impact of the omicron variant have meant that crew members who test positive and need to isolate create a continuing problem for production. This might manifest in the difficulty in temporarily replacing crew who are isolating up to the temporary pausing of a production and subsequent impact on the schedule. Delayed production schedules can also be a cause of crew leaving early to go onto their next job. One example given was of dailies needing to be hired to fill in for missing camera crew and set builders, creating a lot more admin for the production manager.

Brexit

Another contributing factor to issues around equipment is Brexit, albeit Brexit is infrequently mentioned spontaneously by participants. Those who do highlight Brexit see it as a cause and compounding factor of the crew shortage as well as creating difficulties in accessing equipment, supplies and parts. This could be from getting hold of replacement batteries for equipment, getting camera lenses repaired through to difficulties in being able to bring in crew from the EU.

“I know some fantastic people in Spain, you know, but it's not that easy to bring them over.”

- *Line producer*

Perception of US investment

Increased inward investment into the UK from the US, and specifically from US streamers, is commonly cited as the main driver of demand for UK crew. Whilst this is seen as a positive for the UK HETV industry, it can create a more negative feeling towards the streamers who are seen to be ‘responsible’ for accelerating crew rates due to the size of their budgets.

That said, streamers are at the same time being more frequently credited for their support of the industry via training.

“They [streamer] take a very active role in promoting training within the productions, so I, I have seen them take a very positive stand and make a difference”

- *Line producer*

The fear that the UK will become less feasible as a place to shoot HETV for streamers continues to come up in conversation, largely due to the perception that crew rates are spiralling up.

The opportunity for training

As with previous years, a key issue for crew is to be able to find the time to fit in training when there is such a high level of demand within the HETV industry.

“You hear of all these fantastic courses and opportunities and things, but people can't do it because they're shooting. So, it's kind of figuring out when there are those production lulls and doing it in that period”

- *Head of production*

The general consensus is that the best form of training for crew is on-the-job training in a real life setting and that classroom training cannot substitute this. This would apply equally to technical training, learning how to be a specific role or more personal development focused training such as management and leadership.

That said, there are clear limitations on the quality of on-the-job training, especially during times of such high demand:

- It can have little or no formal planning
- Poor practice can be passed on, exacerbating the same poor practice down the line

Formal training has its own set of challenges beyond the lack of time available for it:

- People tend not to recognise training as something they need
- There appear to be lots of training opportunities for new entrant and junior crew but less understood about what is available for more experienced crew
- A question over who is paying for the training
- It can appear London-focused for those in the nations and regions

Changes in the perception of skills-related issues

Research from 2020/21 suggested there were marginal improvements to the skills-related issues within HETV, notably with a lower score for things having worsened (in 2020/21 38% of survey participants suggested skills-related issues had got worse, a smaller percentage than the 53% in 2019/20).

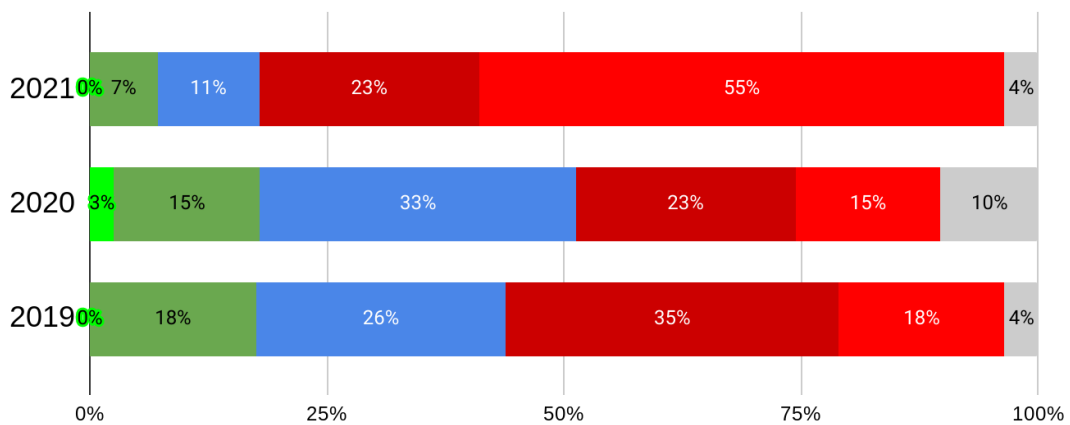
It is clear however from the data below that the situation in 2021/22 appears to be far more bleak:

- The proportion of those surveyed claiming skills-related issues had improved fell from 18% to 7%
- The proportion claiming the situation had got worse doubled from 38% to 79%
- The proportion claiming the situation had 'got a lot worse' more than tripled from 15% to 55%

Thinking of all the issues related to skills in HETV drama in the UK (i.e., shortages and gaps). Over the last 12 months, do you think these issues have generally:

Perceived change in skills issues over last 12 months

■ Got a lot better
 ■ Got a little better
 ■ Stayed the same
 ■ Got a little worse
 ■ Got a lot worse
 ■ Don't know



Base: HETV Industry/support participants (2021, n=56, 2020, n=39, 2019, n=57)

Analysis of conversations with interviewees suggest the key drivers of this situation are the huge increase in demand for production brought about by both the backlog created by lockdown and the continued level of demand.

Interpretation of this data as a 'covid blip' could potentially underplay the current level of demand, perceived to come largely from US producers, notably the streaming services.

Skills-related issues

As can be seen from the data below, there has been an increase in the level of all skills-related issues currently facing the HETV industry.

A number of these issues are interwoven, such as the physical lack of crew leading to stepping up too early, crew leaving productions before they are complete and rates of pay increasing too quickly.

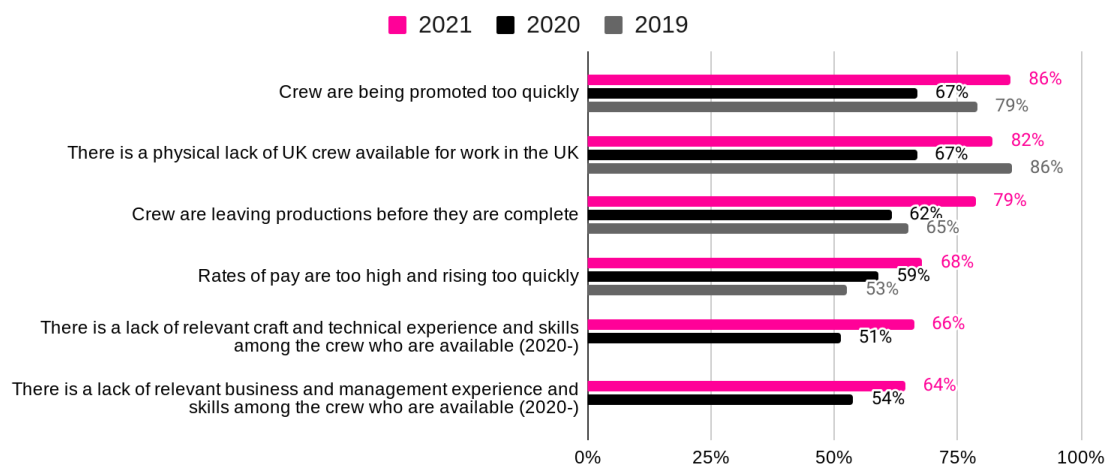
These issues all point towards a ‘sellers’ market’ where due to a shortage of crew and a shortage of skills and experience of crew, the workforce can benefit from this situation by increasing rates of pay and being more selective in the work they undertake. Leaving productions early without the fear of a tarnished reputation is another feature of the current workforce marketplace.

As highlighted earlier in this report, there is a suggestion from interviewees that there is now a cohort of crew whose experience in the industry is only of a time where work has been plentiful. Those who are more experienced and/or more senior can recall times where production work was harder to come by and where rates may have been more suppressed and opportunities for career progression took longer to achieve.

To some extent, therefore, the industry may be rebalancing but when this point is put to interviewees, it is universally felt that the situation has now gone beyond any rebalance and that behaviour such as stepping up early, leaving shows before they are complete and expecting higher and higher levels of pay is concerning to them as potentially detrimental to the health of HETV production in the UK.

In your experience, which of the following best describe any skills-related issue(s) currently being faced within HETV?

Perception of skills issues (prompted list)



Base: HETV Industry/support participants (2021, n=56, 2020, n=39, 2019, n=57)

There is also a strong suggestion from those who work on lower-level HETV budgets - those who are operating around the band 2 level or towards the lower end of band 3 - are being

affected more by crew shortages and show-jumping. They are being forced to compete with higher rates of pay, else find they must take on less experienced crew who could potentially pose a risk to the quality of the production and the efficiency of the production process. Band 3 is now said to be far too wide in terms of budget range and the banding appears to be increasingly less fit for purpose.

Increasing rates of pay

Rapidly increasing rates of pay have been a key issue within HETV since this research first started reporting in 2017. The issue continues to be frequently mentioned

The impact of accelerating rates of pay is raised by the majority of those who participated in the research and is an issue which has risen steadily over the recent past. In 2021/22, 68% of survey participants cited this as an issue.

It is also highlighted frequently and spontaneously within the interviews as a key issue when crewing up.

“The first question they ask you now when I call them is ‘How much am I being paid?’ That’s a new thing. And that’s not happened in the past.”

- *Producer*

One surprising element of the increasing rates of pay is the absence of any sliding scale or gradation in pay for those who have recently stepped up into a bigger role. This means inexperienced crew are expecting and demanding the same rates as those who are far more experienced in the same role.

Neither are crews taking into account, it would seem, the budget band of the production they are being hired for.

“People are just like, ‘Well, that’s my rate now. I get that’ and it sort of becomes irrelevant what sort of level show you’re doing.”

- *Head of production*

The main impact of increasing rates of pay appears to be for band 2 productions and those towards the lower end of band 3 where budget is relatively more limited and where there is said to be a greater need to compromise on the crew being hired.

Stepping up too soon

The most commonly cited issue among survey participants (86%) was of crew being promoted too early, which leads on to a number of problems in the short, mid and long-term:

- An increase in stress on the production and more time needed to deal with inexperience, putting pressure on crew who are required to provide support as well as those who are not ready to take on a bigger role
- A production is put at risk due to inexperience of crew which can result in mistakes being made, impacting on budget, health and safety and shooting schedules

- More time and budget are required to help and support an inexperienced crew member by, for example, outsourcing elements of work or hiring additional crew members to work with them
- The experience of stepping up may lead to individual crew members burning out more quickly
- Poor practice is mirrored by junior crew who receive on-the-job training which is detrimental to the quality of work the UK workforce can offer

It is accepted that stepping up can be a positive experience for crew, in that they are able to take an opportunity that may not ordinarily be available to them. This is important to recognise and highlights how, today, the HETV industry is a good opportunity for crew compared to years past. Good examples of this might be where a crew member fills in or shadows for someone towards the end of a block of shooting or where more support can be put around an individual who is stepping up to a new role. The HETV 'Make A Move' programme is praised as a highly effective initiative to help stepping up become a more positive experience.

However, in many cases, stepping up is talked about in a negative way. It is often couched as something which happens "too soon" for crew and can therefore have a negative impact on the crew member and the production. Nonetheless it is a risk that productions are having to take and, due to the demand for crew, it is an opportunity that crew are taking for themselves.

The lack of experience that crew accumulate is exacerbated by the fact they are often working a smaller number of productions compared to years past. The increased length of HETV productions means crew may only have picked up their experience on one or two shows instead of four or five and so the range of their experience of dealing with challenges and situations is more limited.

Show-jumping

Crew leaving a production early to start a new job is not a new phenomenon and has been a feature of HETV workforce research since 2017. Show-jumping of crew off productions early continues to provide a challenge and headache for productions which are often well underway or nearing completion.

In the 2021/22 research, 79% of survey participants recognised this issue and across the interviews, it was made clear that the situation was worsening and that crew jumping off shows is more commonplace not only towards the end of a shoot but in the middle and in some cases even before the shoot begins.

"So, I have been in a situation where I was doing a project and I'd got my crew all lined up to go on to it... when I came back and touched base with them, they all jumped ship - 4 of them: production manager, the coordinator, the assistant coordinator, the secretary. All 4 of them jumped ship onto a [streamer] show. And so then I'd lost weeks and weeks and weeks of trying to find somebody. And again, I was put in a situation where I had the very last pickings."

- Line producer

There is evidence among the interviewees of more acceptance and understanding as opposed to annoyance as to the motives for crew deciding to jump off a show early.

“There is a risk if you're not having a good time on one job, and you and there's enough, you know, there's 10 jobs sniffing around in the background and they're offering more money. Actually, that's quite an attractive proposition.”

- *Line producer*

“It's hard to tell, you don't always get the full picture when someone pulls out a job”

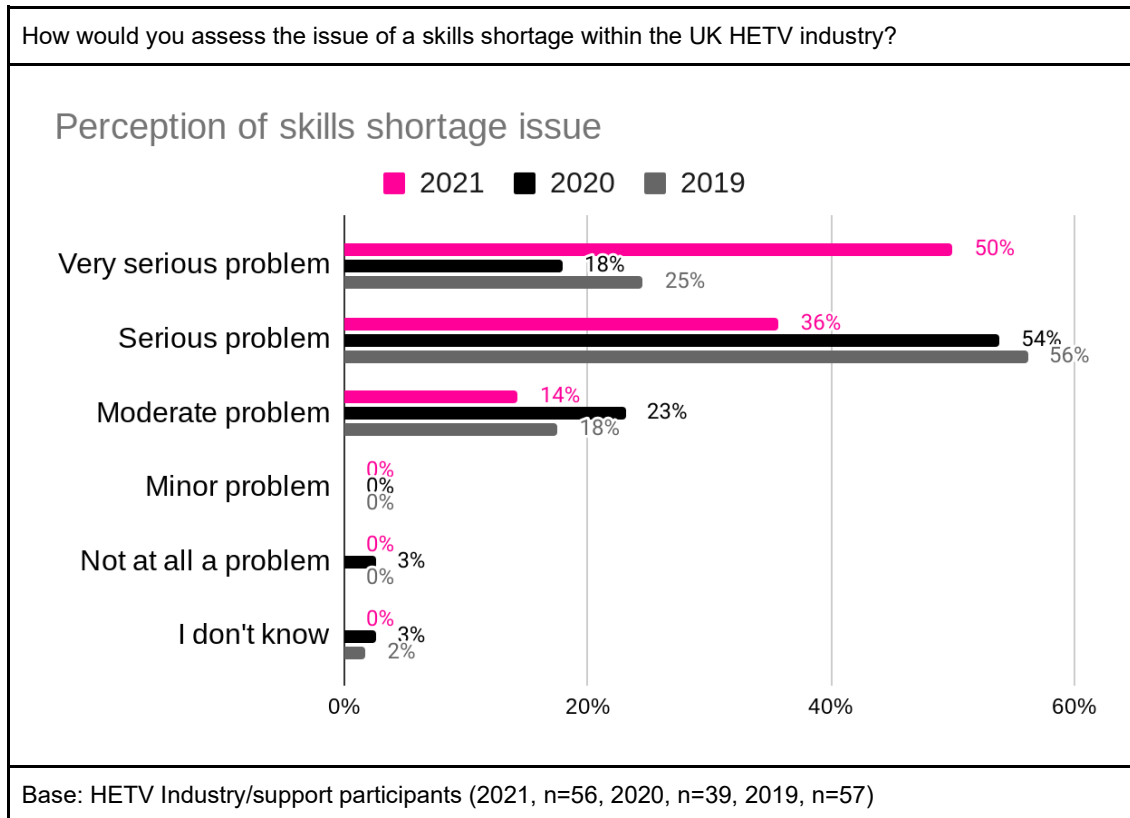
- *Line producer*

Where in the past, crew who leave productions early might expect some tarnish on their reputation, but this appears not to be the case in 2021/22. It is now far more understandable why crew would take on better work or better paid work and the stigma of ‘you'll never work again’ just isn't relevant in today's market.

Skills shortages

The issue of the skills shortage within HETV is clearly displayed in the data below, with 86% of survey participants claiming it to be a 'serious problem' or 'very serious problem' compared to 72% 12 months earlier.

Much more concerning is that 50% of the participants in 2021/22 claim the issue to be 'very serious' which is close to three times that of the previous year (18%).



Interviewees are almost unanimous in the shortage of crew being their most top-of-mind challenge at present. Anecdotes from interviewees reflect this increased severity of the issue, for example, having to go into production without a pivotal role filled is something that hasn't been reported, nor it would seem something interviewees have experienced previously.

"I don't remember a time when I had a production without a coordinator... I don't think I would have willingly gone into production knowing that there would be a complete gap in that role."

- Line producer

There was a sense from interviewees that crew shortages are now more present across a wider range of departments than ever before, and this was reflected in the survey with more participants citing "all grades" as their response to the question about specific grade shortages.

Furthermore, the 2021/22 survey picked up shortages within departments and among grades which weren't mentioned in the 2020/21 survey, including some identified as newly identified shortage roles from previous research:

- Assets clearance
- Sound department
- Carpentry and construction
- VFX
- Post-production supervisor, coordinator
- Make-up artists and dailies
- Digital imaging technician

There were also a wider range of grades highlighted to be in short supply in 2021/22 within departments highlighted in previous rounds of research, such as the production office, art department, editing and locations.

Interviewees gave a sense that mid-level crew are hardest to find at the moment, i.e., those who have stepped up recently from a more junior role and not having had the advantage of the training opportunities of their predecessors due to the level of demand on the industry at present.

In terms of the specific grades in short supply, the following list were most frequently cited in 2021/22:

% of survey participants who mention specific grade shortage	2021/22	2020/21	2019
Production accountant	50%	67%	63%
Line producer	39%	28%	40%
Production coordinator	36%	38%	42%
Location manager	32%	51%	46%
1st AD	30%	18%	30%
Grip	25%	10%	23%
Production manager / supervisor	23%	36%	18%
Producer	16%	18%	19%
Production office non-specific	16%	-	-
All grades	14%	-	-
VFX editor / supervisor / producer	14%	-	-
2nd AD / crowd 2nd AD / crowd supervisor	13%	3%	12%
'Production' non-specific	11%	-	-
Art department non-specific	9%		

Assistant editor / 2nd assistant editor	9%	3%	5%
Editor / 1st assistant editor	9%	10%	19%
Post-production supervisor	9%	-	-
Post-production non-specific	9%	-	-
Assistant sound editor / 1st / 2nd assistant sound	7%	-	-
Costume supervisor / maker	7%	-	-
Covid coordination / production manager / supervisor	7%	9%	-
Production designer	7%	10%	-
Script supervisor	7%	5%	7%
Carpenter / construction / construction manager	6%	3%	2%
Art director / supervising art director	5%	6%	7%
Sound designer / effects / foley editor	5%	-	-
Costume designer	5%	3%	5%
DIT	5%	-	-
Electrician	5%	10%	11%
Gaffer	5%	3%	7%
Location coordinator / assistant	5%	3%	-
Make-up designer / artist	5%	5%	-
Script editor	5%	8%	5%
Unit manager / transport captain	5%	3%	9%
Accounts non-specific	4%	-	-
Assets clearance / clearance coordinator	4%		
Assistant location manager	4%	-	-
Assistant production accountant	4%	5%	19%
Colourist	4%	5%	2%
Lighting non-specific	4%	-	-
Production secretary / assistant coordinator	5%	8%	12%
Rigger	4%	3%	5%
Set decorator	4%	3%	9%
Props non-specific	4%	-	-
Writer	4%	3%	-
Assistant grip	2%	-	-
Best boy	2%	-	-
Boom operator	2%	-	-
Camera operator	2%	5%	4%

Composer	2%	-	-
Crafts people	2%	-	-
Director	2%	10%	7%
DoP	2%	8%	4%
Financial controller	2%	10%	4%
Focus puller	2%	-	-
Graphic designer	2%	-	-
Make-up / hair dailies	2%	-	-
Model maker	2%	-	-
Art department coordinator	-	3%	-
Block producer	-	3%	-
Intimacy coordinator	-	3%	-
Production buyer	-	3%	-
Technician / technical assistant	-	6%	2%
Travel and accommodation coordinator	-	3%	-
Base: HETV Industry/support participants (2021, n=56, 2020, n=39, 2019, n=57)			

Whilst there does appear to be some lessening of the shortage of certain grades, such as production accountants and location managers, the increase in the range of grades mentioned in 2021/22 might partly explain less focus on specific ones. There has also been some notable increase in the frequency of some grades such as line producers, 1st ADs and grips.

Regional aspects of skills shortages

Interviewees noted that the shortage problem was one which ran across the whole country. This was true of those based in or near London as well as those based within the nations and regions.

What appears to affect the nations and regions far more is the number of productions that are shooting at any one time. Depending on the area in question, capacity can easily be reached very easily, and this raised the idea of potentially monitoring this situation and helping productions in the nations and regions to schedule their shoots in order to best avoid crew shortages and maximise the opportunities that these areas can provide to HETV.

Those in the nations and regions also called for more work for local HoDs rather than productions relying on 'imported' HoDs.

Generally, the nations and regions were perceived to be very busy, alongside London and the south-east which raised the idea of more opportunities to shoot in the less obvious areas, such as the north-east.

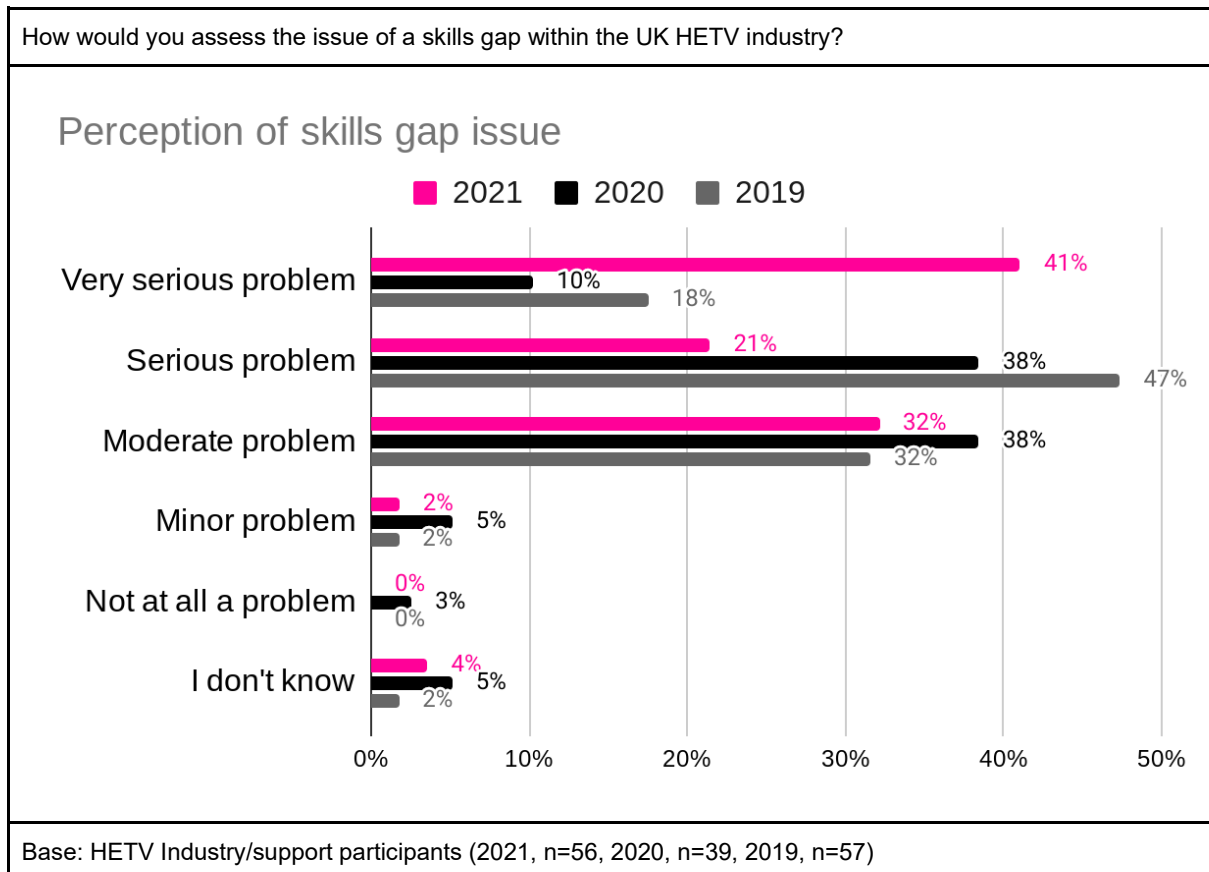
“You can actually get some good crews in Newcastle, and they've not enough work going on there... it's a joy to do a project there because you are getting people that will stay loyal”.

- *Producer*

Skills gaps

In a similar trend to the skills shortage issue, the skills *gap* issue - defined for this research as “a lack of key skills within the crew who are available to hire” - has also shown a concerning increase in severity in 2021/22 compared to 12 months earlier.

Overall, those citing the skills gap issue as either ‘serious’ or ‘very serious’ was 63%, ahead of the 49% for 2020/21. However, the increase in those citing the issue as ‘very serious’ increased four-fold year-on-year.

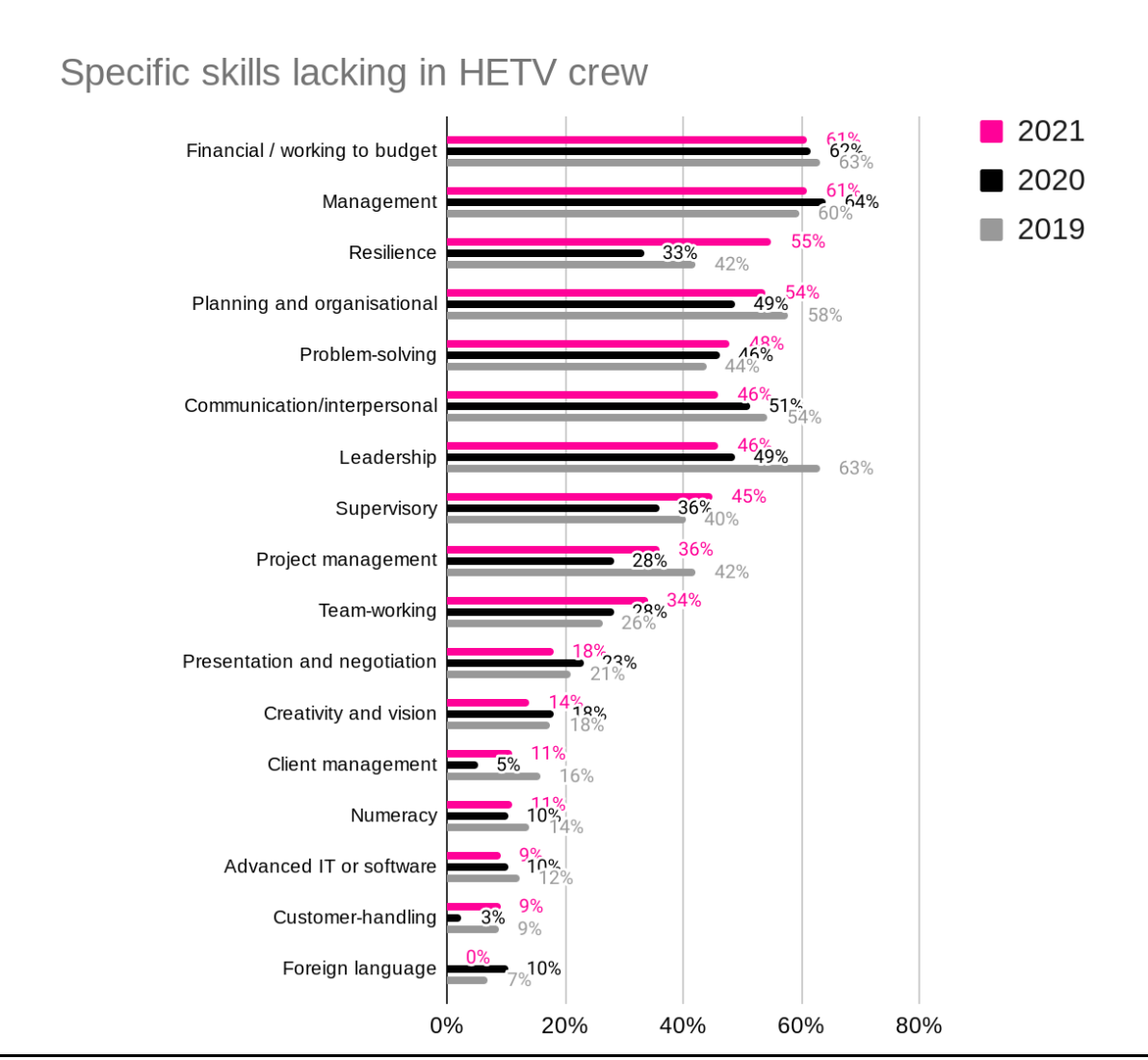


Digging into the skills gap in the follow-up interviews highlights key themes that sit underneath. Primarily and most obviously, the skills gap issue is linked to the lack of skills and experience of those who have stepped up or been stepped up too early.

As the issue of stepping up too soon continues, a long-term implication is the risk of impairing the level of quality within the UK workforce. This might also be compounded by the level of fatigue and perceived lower level of loyalty and commitment from the UK HETV workforce.

Beyond the lack of experience and skills related to specific roles, there are a number of key skills which appear to be lacking among crew, as can be seen from the chart below.

Which of the following skills do you find are lacking in particular among crew you are hiring at the moment or in the recent past?



Base: HETV Industry/support participants (2021, n=56, 2020, n=39, 2019, n=57)

The key skills which appear to be most lacking from the workforce continue to be ‘financial / working to a budget’ (61%) and ‘management’ (61%). Positively in the context of a far more serious skills gap, ‘leadership’ (45%) continues to decrease as a skill lacking, from a high of 63% in 2019.

One skill or workforce attribute that has increased notably in terms of lacking is ‘resilience’ (55%), up from 33% 12 months earlier. This puts more context around the theme reported earlier of increased fatigue and a lack of commitment and loyalty from the workforce. Perhaps more resources and training are required to help build resilience in the workforce. An increase in a lack of ‘supervisory’, ‘project management’ and ‘team-working’ skills might also be seen within this context.

One key skill which does crop up repeatedly in conversation with interviewees is a lack of understanding of how to behave on set and the often unwritten rules of ‘set etiquette’. This

ranges from understanding the hierarchy and organisational structure of a production, through to expected behaviour on and off set as well as seemingly small things such as the use of mobile phones and headphones.

It is widely recognised that a few of the more business-related skills, such as leadership and management are difficult to learn and are often built up over years of experience. This presents a challenge for any training offered in this area.

“I know, there are various courses that HoDs can do, and I've been to them, but I don't think leadership can be taught in two hours. I don't think it's that easy. I think it takes years. I don't know if individuals are willing to make that investment in that aspect of their role.”

- *Line producer*

Specifically on leadership, this is not something that is always talked about at the recruitment stage when finding for example HoDs.

“It's [leadership experience] not something that is talked about, I find, at the recruitment stage. With HoDs, things like What experience do they have in leadership? What experience or what training have they had in that field? What do they know about what it is to be a leader? That's now how it works There's a lot of emphasis on the creative.”

- *Line producer*

One line producer suggested they always look out for new entrants who have experience of doing part-time work alongside their studies as evidence that they will have better time-management and communication skills compared to those who have not previously worked.

Attitude and personality are also important attributes to flag in any discussion around skills as the right attitude and personality can make up for a lack of experience and enable crew to really 'fly' through their careers.

“I would always opt for somebody that's got the right level of personality, because if they've got that, then you can try and guide them on the right route.”

- *Line producer*

Drivers of skill-related issues

Two clear drivers of the skills related issues emerge from the conversations with interviewees:

- An explosion in demand for crew following the lockdown of the HETV industry
- An ever-increasing level of growth for inward investment

These two driving factors contribute to a skills shortage and increasing rates of pay, in turn leading to crew jumping off shows early and being stepped up too soon which results in a skills and experience gap.

“It’s always been busy but post covid, post lockdown it’s insane.”

- *Line producer*

There is also a range of contributing factors cited by interviewees which exacerbate an already challenging set of issues:

- More productions are becoming bigger with higher budgets and more complex shoots which require larger crews across a wide range of departments
- Crew are leaving the industry due to being burnt-out
- The more experienced crew are being sought out for the larger budget productions, leaving band 2 and lower-level band 3 productions in a more precarious position regarding crewing
- Productions are trying to shoot in the same locations or regions where there is a more finite amount of crew available for HETV work

Dealing with skills shortages and gaps

As has been reported in previous rounds of research, the UK HETV workforce is a creative force that can think laterally, flex and adapt to overcome challenges in order to maintain a very high-quality product. Arguably this is a key reason why there is such high demand for UK production.

Among interviewees, there is a general level of acceptance that the skills related issues - principally the skills shortage - will not be fixed overnight.

A key theme in dealing with the challenges thrown at a production is one of ‘compromise’. Compromise takes several different forms, such as:

- Accepting that available crew might not be the ideal hire and taking on those who in another situation might be rejected
- Keeping a crew member on a production who is underperforming or not skilled/experienced enough rather than letting them go
- Taking a risk on stepping someone up much earlier

- Starting the crewing up process earlier and having to spend longer on this aspect of the production process
- Paying retainers to key crew in order to keep them on for the next production
- Outsourcing elements of work to those who can work remotely for key tasks such as contracting and accepting this might mean an opportunity is missed to train others to complete these tasks
- Bringing in crew from outside of drama, or outside of TV from industries such as events, where people with the right attitude and personality can be found
- Hiring in dailies to get a job completed despite the increased workload and budget required
- Rescheduling a shoot or altering the schedule to accommodate for times when crew are unavailable, for example, moving a crane day or condensing shooting blocks and taking on different crew for each block of filming

The increased risk associated with how productions deal with skills shortages and gaps can work out positively but often sometimes does not.

More positively, the idea came through from interviews that to maintain and nurture crew requires a focus on creating a positive work culture and environment as well as providing training opportunities for crew when the opportunities and timing are right.

Linked to the idea of nurturing talent is seeing the opportunity in working with crew who have a wider range of skills and experience than just those garnered through HETV. One interviewee suggested that crews in the nations and regions who need to take on all kinds of production work should be celebrated rather than being seen as lacking experience of HETV.

“The ingenuity you have when you've worked multi-discipline is of massive benefit to working in high end.”

- *Head of production*

Lack of diversity and inclusion

In the context of a worsening situation regarding skills shortages and gaps, it is perhaps not surprising that interviewees have also cited increased difficulties in finding crew who are from a diverse background.

However, where improvement can be reported is an incremental improvement to the perception at least of the level of diversity within the workforce as well as a continuing sense that D&I issues are being considered more often and earlier in the prep and crewing up stage of a production.

There does not appear to be any lack of willingness or desire to create a more inclusive workforce and it is a recognised need to continue the creative 'health' of the industry and finding the next raft of talent who will go on to make the big TV dramas. It was also pointed

out the importance of a strong level of representation from a D&I perspective within senior and decision-making positions.

Interviewees are split between those who feel they do not have access to enough resources to help them to find more diverse crew and those who can cite a number of organisations who they can work with in this area. Dandi and Mama Youth are examples given.

Broadcasters such as Sky, Channel 4 and the BBC are also mentioned as having their own internal schemes to promote diversity and inclusion; Sky's Diversity Day was praised as a way to bring in a wide range of diverse crew into HETV.

There are nuances to the D&I challenge it would seem, particularly from a N&R perspective. For those who work in areas where there is very different demography - for example where the proportion of the non-white population is markedly lower - the expectations and quotas which can be set on a production can be less workable. Here is where the many facets of D&I come into play and where, it is suggested, there could be more emphasis placed upon productions to reach out to groups from a lower socio-economic group.

Others pick up on this point, regardless of their location.

"Mine is always socio-economic diversity, we can make this industry as, you know, supposedly inclusive as we like ticking off lots of boxes. But if ultimately, it's still a very middle-class industry, you've got most of the population who don't have access to it, and don't have most population who are not feeding their ideas into it as creatives."

- *Broadcast executive*

There are also regulatory and legal challenges to solving the D&I issue, such as not being permitted to know the ethnicity of a person from their application to a job, trainee programme or related initiative. On a far more practical point, it is noted that not being able to drive, or not owning a car is a fundamental barrier to working in HETV.

Others suggest that people from certain cultures do not perceive the film and TV industry to be a 'proper' career. However, positive discrimination to get more people of colour into the industry is also mentioned by some as a problem should it affect getting the very best person to fulfil a role.

In terms of culture, one interviewee suggested a cultural shift was needed within HETV in order to take more of a risk and take on crew from a wider pool. In this context, the need to step people up early, due to market forces, may provide such an opportunity.

Others comment on a lack of leadership within the industry on the D&I issues; that there is no single organisation or body who is taking charge and leading the industry forward.

