



Derry Gins in Trick Productions

Scripted production workforce in the UK's nations and regions

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Scripted production workforce in the UK's nations and regions: variations of challenges and opportunities

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Acknowledgement

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Executive summary

Aims and approach

From autumn 2021 to spring 2022, as studios, facilities and locations around the UK faced high demand from scripted physical production, this qualitative study set out to explore crew shortages, skills gaps and related workforce issues by nations and regions.

We sought to highlight commonalities and differences between UK geographies, and the likely reasons behind any variation. Our key findings will be used to prioritise support and target areas of greatest need. Details of the methodology can be found on pp 7-8.

Key findings

Optimism for continued growth in scripted production is apparent around the UK, but similar challenges are reported everywhere as regional hubs step up to meet opportunities.

Interviewees from all nations and regions report a thriving but pressured industry, with cautious optimism for ongoing demand in at least the midterm. Findings reveal many more similarities than differences in skills needs, issues or desired solutions among nations and regions. Across the UK, it was recognised by interviewees that the high volume of crew stepping-up contributed to skills gaps. Production centres around the UK are experiencing opportunities for growth. However, there is a perception amongst those interviewed that crew shortages are compounded in smaller hubs where the challenge to scale up is steeper as the volume and pace of work build faster than the crew base develops. Some place-specific factors, population demographics and fluency in the Welsh language add another dimension to challenges in some areas.

A desire for a joined-up industry approach is evident – and, despite immediate need, mid- to long-term solutions to shortages, training and inclusion are favoured around the UK, with greater industry ownership of outreach, crew development and retention.

Interviewees suggested that a stronger joined-up industry-led approach to crew development is needed to address gaps. This includes an industry-wide approach to placements and training - from short-courses to apprenticeships. Similarly, a joined-up industry approach was noted by interviewees in being able to help inclusivity within the industry. There were calls for industry as a whole to better communicate opportunities for new entrants and transferers from other sectors, to a more diverse range of people.

While immediate demand is an issue, interviewees from all nations and regions most commonly want a greater amount of structured on-the-job training and a joined-up 'standardised' industry approach to crew development. While many production and commissioning companies invest in skills through contributions to the ScreenSkills Skills Funds, the apprenticeship levy, or in-house training, it is perceived that greater investment in training by bigger companies such as SVoDs, ie those considered to be benefiting most from the current boom, is needed. Placement opportunities remain the preferred way to develop professional skills. Improving awareness of screen industry job roles - what they involve and how they progress - is also considered a priority around the UK, to help better equip those entering and progressing in industry.

However, many acknowledge that crew shortages cannot be solved by training alone. Growth in production has presented opportunities to embrace changes to work practices and attitudes to help make careers in scripted production more attractive. At present, this is affected by negative perceptions or experiences of working culture. Good practice, such as offering training or flexible working to help develop and retain crew and attract transferers from other sectors, appears lacking, though instances were positively reported in Wales, Northern Ireland, the Midlands and London/South East.

To further help address shortages, cautious positivity toward employing workforce from other sectors is evident, but support is needed to help these potential transferers convert their skills to scripted production and boost industry's confidence in hiring them.

Despite overall sector buoyancy, lower-budget production is hard-hit as it struggles to compete amidst increasing costs and high demand for crew, locations and facilities.

While there is little difference reported between nations and regions - and scripted sub-sectors - issues are intensified for productions at lower budget levels. Crew all over the UK appear to be moving between scripted sectors less often. They appear to be prioritising longer, better-paid opportunities offered by HETV - particularly bigger budget SVoD-commissioned series - over independent film, children's and other TV drama. Increased instances of show-jumping to take up a preferred offer are reported. Productions with lower budgets across the UK are most feeling the squeeze, not just from crew shortages but from rising commercial costs - such as crew rates, hire fees, and overheads - and increased competition for locations and facilities.

Informal hiring, national diversity quotas applied in less ethnically diverse regions, and an unpredictable flow of work in some areas may be inhibiting inclusivity so focus needs to be on improving outreach.

Word-of-mouth remains the dominant method of finding crew in the UK, driven by need for speed and trust. No differences in hiring practice are apparent between nations and regions. While many interviewees agree that the boom in scripted production has necessitated looking more widely for crew, and in theory created more work opportunities, in some instances it has also shortened the timeframe to crew up. This increased time-based pressure means that the convenience and reduced risk of hiring from known networks is even more attractive and could, therefore, be fuelling reliance on a limited pool of crew and talent instead of expanding opportunity to a greater diversity.

A minority perceives diversity to be improving, but there is widespread acknowledgment of ongoing issues. Most believe that crew from Black, Asian and ethnic minority backgrounds, disabled crew and/or crew from working-class backgrounds are under-represented in their local screen workforce, regardless of their location. Welsh speakers are diminishing among crews in Wales and, while this may have several causes, a contributing factor is likely to be crew being tempted away from indigenous productions by higher-budget English-language productions.

In addition, national diversity quotas from broadcasters are deemed to present challenges when applied to less ethnically diverse areas. Some productions report a dilemma between hiring locally but falling short of diversity targets or bringing in more diverse crew from elsewhere. However, in the West Midlands, which has the second highest non-white population in the UK, the situation is attributed more to a lack of physical infrastructure. In the qualitative interviews within the region, it was perceived that the absence of studios and facilities of the scale required for high-end production, and the resulting unpredictable flow of work, has inhibited the opportunity to grow a strong scripted crew base from within the ethnically diverse local population.

Despite these findings, most interviewees around the UK feel that difficulty reaching out to people from all backgrounds to highlight the range of screen careers and prospects is the biggest barrier to improving diversity. A stronger, joined-up industry approach to better communicate opportunities for new entrants and transferers from other sectors is evident from those interviewed.

Widespread crew shortages are evident, particularly in production roles, with little geographical variation in perceived causes and consequences.

While recruitment challenges appear across departments, production grades are reported as hardest to find and appear among the top-ranking shortage roles in all nations and regions. Most interviewees attribute shortages to the increase in SVoD-commissioned high-end drama series, which offer good pay rates and long runs, and hire bigger crews.

Crew burnout and the loss of 'traditional' training grounds (eg within the BBC and ITV) are also felt to be contributing factors. In hubs outside of London/South East, there is a perception that inbound productions can overlook local crew.

Regardless of where they are based, the majority of interviewees are seeing too many people at all levels move up to more senior roles with inadequate experience. The widespread practice of stepping people up early is the most reported action taken to address crew shortages, placing reliance on experienced crew to support those with less experience.

With much focus on developing below-the-line crew to serve the boom in bigger budget film and HETV production, and the risk of lower budget production being side-lined, there is now concern that the development and support of above-the-line talent is becoming overlooked, particularly within independent feature film. Developing new writers, directors and producers is seen as critical to maintaining and strengthening indigenous voices in independent production - something which is highlighted around the UK, but is of particular concern in the nations and regions outside of London/South East.

Skills gaps are widely evident across roles and departments, with reliance on experienced crew to guide others on the job or cover the gaps themselves.

Reports vary around the UK and include gaps in production, craft and technical skills as well as professional (or 'soft') skills. However, no distinct geographical patterns are evident, though this could reflect the nature and size of the sample. Most commonly, skills gaps are attributed to the high volume of crew stepping up and often manifest only when production is underway with the crew member in the role.

The size and shape of crews required by big budget productions, particularly HETV, is leading to a narrowing of some roles - and therefore experience - as crew members enter and progress while only focused on one aspect of the job. They are consequently less exposed to the bigger picture of the role, potentially making them ill-equipped for sustainable career progression.

As with crew shortages, a large majority of interviewees, from all nations and regions, feel that more industry ownership of - and investment in - crew development (from short courses to apprenticeships) is needed to address gaps, favouring on-the-job training for entrants and those progressing.

Formal classroom or online training courses are a low priority, as freelancers lack time between contracts and productions favour on-the-job development for entrants and experienced crew alike.

The value of formal training courses is acknowledged, particularly in enabling participants to have an intensive learning period in a dedicated, confidential, and safe environment. However, the increase in work opportunities has made such courses difficult to accommodate in busy schedules. As freelancers experience little or no downtime between productions, concern is apparent that training for crew - particularly standalone courses - has become regarded as an administrative requirement, focused on ensuring that mandatory courses such as health and safety are undertaken, and not considering broader skills development.

The majority preference from productions in all nations and regions is for professional training to be delivered on-the-job, rather than through standalone courses, enabling learning to happen while working. This applies whether starting or progressing in a career. There is a desire for work-based training to have structured pathways, dedicated training supervision, industry mentoring and broader exposure to the job role, department, and production. Such an approach is deemed necessary to ensure entrants and professionals are suitably equipped to progress their careers.

The UK's scripted production sector is confident that growth can be sustained, but regional hubs and independent production need support to build long-term sustainability.

Optimism is clear in all nations and regions for a booming sector in which working culture and practices will evolve for the better. The ability to keep up with demand, including the development of crew, is seen as a key barrier to overcome for commercial sustainability UK-wide and is a challenge for individual productions/companies, regional hubs and the scripted sector as a whole.

Greater collective investment - from industry and public investors - in the planning, development, and promotion of local hubs is widely called for, evident in responses from most of the nations and regions. A stronger focus on the development of the local crew base is also perceived as key to boosting production in Northern Ireland, Scotland, West/South West, Wales and Yorkshire/North East.

Introduction

Following unprecedented recent growth, which has seen studios, facilities and locations across the UK in high demand, this study focuses on scripted production to explore its particular crew shortages, skills gaps and related workforce characteristics by geographical location.

This research was conducted between October 2021 and March 2022, at a time when the nations and regions were taking advantage of opportunities afforded by an ongoing boom and seeking ways to increase the long-term sustainability of local production hubs. We sought to highlight commonalities and differences between UK geographies, and the likely reasons behind any variation. Our key findings will be used to help ScreenSkills prioritise support and target areas of greatest need.

Definitions

The following definitions were set out to help structure the research:

Scripted production

Skills needs in four categories of scripted production were explored: children's drama (children's), feature film (film, including studio productions and independent features), high-end TV (HETV) and other scripted TV, with the latter comprising lower budget drama, including continuing, daytime and comedy. The research focused on physical production and did not extend into post-production or off-set VFX.

Nations and regions

Northern Ireland, Scotland and Wales were each considered as whole nations, while England was broken into six regions based on ITL¹ definitions:

- East and West Midlands (Midlands)
- East of England (East)
- London and South East England (London/South East)
- North West England (North West)
- West and South West England (West/South West)
- Yorkshire and North East England (Yorkshire/North East)

This broad breakdown was chosen to build a snapshot within the scope, aims and timing of the research. We recognise that in some instances two or more geographical regions have been combined. We also acknowledge that each of the defined nations or regions contains its own unique production landscape within which a range of varying features, challenges and ambitions exist. As such, we have tried to reflect a representative range of perspectives within the report narrative.

Methodology

The study is based on qualitative research, consisting of in-depth interviews.

In-depth interviews

Interviews were conducted with two distinct samples across the defined nations and regions groupings:

- 44 employers and freelancers with hiring responsibilities for scripted production, eg line producers, heads of department, production managers (hereafter referred to as 'production interviewees')
- 14 screen agencies, film offices and other sector bodies supporting scripted production (hereafter referred to as 'agency/body interviewees')

¹ International Territorial Level

Conducted by phone or video call, each interview lasted approximately 45 minutes. Conversations explored the nature of place-specific shortages and gaps, seeking to identify and understand the local factors that may be influencing them. Interviews covered a similar range of topics for each sample, but questions were tailored to meet the different roles and functions of each group. This included looking at reasons for shortages (eg level and type of production throughput, workforce profile, attractiveness to productions), whether they are long-standing or transitory issues, and the impact they are having on daily operations. To build a bigger picture and ascertain what could best help alleviate current shortages, interviewees were asked their views on possible solutions to skills issues and anticipated changes to scripted production, including how these may affect industry locally. Employers and freelancers were also asked about their perceptions of local education and training provision.

Of the production interviewees, approximately half work mostly in HETV, a quarter in live action children's drama and the remainder in film or other scripted TV.

Data analysis

To derive location-based findings, from what is a largely peripatetic sample, can be problematic. Crew often move around the UK, whether in the lifecycle of a single production or when moving from one production to the next. It was therefore necessary to use the primary location and scripted sub-sector of production interviewees' work over the past 12 months to place their responses within the defined nations and regions breakdown.

Findings for each nation and region are based on the combined responses placed there, regardless of scripted sub-sector. We have used evidence from the interviews to highlight any distinct location-based patterns or differences perceived among the scripted sub-sectors, and to flag instances where the nomadic nature of the workforce may have influenced findings or provided additional insight. Where trends or themes have been identified, these have been attributed to any nation or region in which they were mentioned.

Presentation of findings

Having acknowledged the unique production landscape in each UK nation and region, many views and experiences relating to skills issues and workforce development captured in this research are common to all. Therefore, instead of presenting nation- or region-specific breakdowns of the findings, we have provided top-level background context for each geographical area, followed by combined UK-wide findings, highlighting key geographical differences where they appear.

Literature review

An accompanying literature review looked for further sources of information pertaining to skills gaps and shortages within specific nations and regions. Although this tends to be rather patchy, comprehensive place-based research was conducted in Northern Ireland, Scotland, Wales, and Yorkshire and used in this report to provide additional context.

In addition, a top-level review of infrastructure, investments and incentives to encourage and support scripted production - at a national or regional level - was also undertaken to help provide further context for the interview responses.

Context

Fuelled by competitive tax breaks from the UK government, a heritage of world-class crew and good facilities, inward investment in scripted production is experiencing a boom. Major SVoDs including Amazon, Disney and Netflix are utilising space in the nations and regions, as well as Greater London. More studios have been built to keep pace of this demand (Nordicity; Saffreys Champness; ScreenSkills, 2022).

National and regional screen agencies or bodies exist to support and maximise cultural, economic, and educational benefits of screen industries based in or visiting their area. This can range from development and production funds to skills and training initiatives, local archives and exhibition programmes. Often acting as the first point of contact for filming enquiries in their nation or region, many offer production liaison and support services such as helping to identify locations, studios, facilities, and crew. They also signpost productions to the dedicated local film offices that exist in most parts of the UK, at county, city, town or borough level. In many cases, film offices are part of, or supported by, the corresponding local council and as such can assist with services such as filming permits and road closures, as well as offering another level of contact with locations, facilities and crew. The range and level of service offered by screen agencies and film offices varies between nations and regions, depending on the available resource and organisational remit.

As part of its wider remit to maximise and support the production of international feature film and television in the UK, the British Film Commission (BFC) is targeting studio, stage and space development in key UK hubs to help increase capacity and maximise the opportunity to strengthen the surrounding crew base and infrastructure presented by growth. Public service broadcasters have also renewed their commitment to the nations and regions, affecting scripted and unscripted content. Channel 4 has established its national headquarters in Leeds (Channel 4, 2018) and opened creative hubs in Glasgow and Bristol. The BBC has laid out plans (BBC, 2021) to produce at least 60% of its UK-wide TV spend outside of London and move significant parts of BBC News outside of the capital, as well as committing to more creative partnerships and learning hubs within the nations and regions.

With a broader remit, in 2018, the Arts and Humanities Research Council (AHRC) launched the Creative Industries Clusters Programme² to encourage innovation, regional growth, and a new approach to applied research in the UK's creative sectors. Funded by the Industrial Strategy Challenge Fund and running until 2023, the £120m investment programme backed nine research and development partnerships around the UK, plus a dedicated Creative Industries Policy and Evidence Centre led by Nesta. Participating organisations include universities, sector support bodies, and businesses. The aim is to create jobs while driving the creation of companies, products and experiences in a range of creative sectors including broadcast and screen industries, animation and video games, and digital storytelling.

The BFI supports the development of independent film and film audiences through national and regional partnerships, including the BFI Network and BFI Film Hubs in the Midlands, North, Northern Ireland, Scotland, South East, South West, and Wales, as well as London. In addition, the BFI set up a National Cluster Growth Fund to help develop a limited number of screen clusters around the UK into hubs of international significance. Awards from the fund included Create Central (West Midlands) and Screen Yorkshire (Yorkshire and the Humber) to help with local economic development plans. The latter was further supported in a partnership with ScreenSkills to establish a Centre of Screen Excellence in Yorkshire. The BFI also funds national partners to provide vital production services support to film and HETV in England, Northern Ireland, Scotland, and Wales.

Against this top-level backdrop, the UK's nations and regions offer additional features and initiatives to attract and support scripted production. The non-exhaustive summaries below are intended to set the scene, particularly focused on key production hubs, before considering the findings of this study's qualitative interviews and literature review. In this context, we have chosen to exclude screen-focused training provision from the summaries due to the range and volume of offers, and multiplicity of organisations involved. The paragraph that follows is intended as an overview of some of the ScreenSkills-delivered programmes, initiatives and activities being

² See [AHRC and UKRI Creative Industries Clusters Programme, 2018-2023](#)

developed in the nations and regions. ScreenSkills delivers and/or commissions face-to-face skills and training programmes across the UK, focused on the production hubs, and working with a range of local partners and training providers. This is augmented by training delivered online, such as e-learning, designed to make training accessible regardless of geography, while other career development is frequently delivered remotely, such as mentoring. In order to support increased access to opportunity, it is now operating a jobs board and members of the community of more than 150,000 people registered for training can showcase the skills and CVs by making their profile public on the ScreenSkills website. Dedicated training liaison managers support this work in Northern Ireland, Wales and Scotland with other members of staff based in English regions.

Northern Ireland

Within easy reach of Belfast's centre, eight-acre Belfast Harbour Studios is one of the largest purpose-built complexes to be built in the UK in recent years. In 2021, planning permission was granted to further scale up the studios with an estimated £45m investment, expected to commence in 2022. Looking to advances in production technology, a new £1.6m virtual production studio was announced in 2022, developed by Ulster University in conjunction with Belfast Harbour Studios. In addition, Loop Studios and Titanic Studios - which hosted HBO's *Game of Thrones* for a decade - continue to provide a range of studios, sound stages and other build spaces developed to meet the successful growth of scripted production in Northern Ireland.

Local scripted production companies include 23Ten, Green Dragon Media, Out of Orbit, and Village Films. London-based companies Mammoth Screen (part of the ITV Group) and Hat Trick have Belfast offices, as does Two Cities Television, which belongs to the STV Studios Group. Zodiak Kids, part of the Banijay Group, regularly produces children's output in Northern Ireland, including scripted. In terms of broadcasters, BBC Studios' presence in Northern Ireland is focused on unscripted genres, ITV produces local news and current affairs under the UTV banner, and Channel 4 has a sales office in Belfast.

Now a busy hub attracting significant inward investment alongside indigenous industry, production is supported on the ground by the national screen agency, Northern Ireland Screen. This includes free-to-access locations, crew and facilities databases, along with practical advice and help with the logistics of filming in Northern Ireland, including the uncertainty around the impact of Brexit and the Northern Ireland Protocol on the local screen industry. To further attract production and encourage a sustainable screen industry with direct economic benefit to the nation, funding is available through Northern Ireland Screen towards commercially viable feature films, TV drama, animation, factual and entertainment TV, and interactive content, usually in the form of a recoupable loan. Other production funds administered by Northern Ireland Screen include the Irish Language Broadcast Fund, which supports a range of content genres for broadcast via BBC NI, TG4 and RTÉ.

Recent scripted productions filmed in Northern Ireland include features *Ballywalter*, *Dungeons and Dragons*, *Lift*, *Nightride* and *The Northman*; and series *Bloodlands*, *Blue Lights*, *Conversations with Friends*, *Derry Girls*, *Hope Street*, *My Mother and Other Strangers*, *Nova Jones*, *The School for Good and Evil*, *Tom Jones* and *Wrecked*.

Scotland

Centred largely around Edinburgh and Glasgow, Scotland's studios and build spaces are diverse, serving a range of production budgets and genres. FirstStage Studios is a self-contained complex close to Edinburgh's centre and recently hosted series *Anansi Boys* and *The Rig*, while nearby Bathgate offers converted build space at Pyramid Business Park and Edinburgh Film Studios caters to a range of smaller productions, including children's TV.

Near Glasgow, Scotland's only fully integrated complex Wardpark Studios is the base for the long-running series *Outlander*. Closer to Glasgow centre, The Shed provides more build space for

productions of scale. The Glasgow hub has further smaller spaces including Assumption Studios, Saviours Studio and The Comedy Unit's TCU Studio owned by the global content group Banijay. Scottish Opera also shares its Glasgow rehearsal space, Silver Cloud Studio, with film and TV productions. In late 2021, BBC Studioworks was selected as operator of Kelvin Hall TV studio in Glasgow, which will house a breadth of entertainment shows across genres. Due to fully open in late 2022, Kelvin Hall has already provided build space for comedy drama series *Screw*. Beyond Scotland's two larger conurbations, Studio Alba in Stornoway, Isle of Lewis, has hosted productions for BBC Alba and ITV in the Western Isles.

BBC Scotland has two Glasgow bases. Pacific Quay studios largely serves unscripted production, while Dumbarton Studios is the base of continuing drama *River City* and has housed scripted series, including *Shetland*, *Two Doors Down* and *Vigil*. STV Group, part of ITV Group, is also based in Glasgow and includes STV Studios, Scotland's largest production company producing drama, entertainment and factual output. Its portfolio of scripted shows includes *Elizabeth is Missing*, *Murder Island*, *Screw* and *The Victim*. Channel 4 set up a creative hub in Glasgow in 2019 as part of its relocation from London. Independent drama production companies include Black Camel Pictures, Hopscotch Films, Synchronicity Films and Two Rivers Media. London-based companies World Productions and Buccaneer Media have both set up Scottish offices. Recent feature films shot in Scotland include *Batgirl*, *Borderland*, *Girl*, *Killing Escobar* and *The Last King*.

Supporting scripted production, Screen Scotland provides a free locations service covering the whole nation, including connecting productions to local location managers and scouts, and the network of dedicated film offices and screen commissions across Scotland, such as Glasgow Film Office and FifeScreen+TayScreen. A national crew database is operated by Film Bang, and Screen Facilities Scotland - a trade body and member organisation affiliated to UK Screen Alliance - represents facilities and services companies. In addition, Screen Scotland offers a range of funding to attract productions. Targeting indigenous filmmakers, the Film Development and Production Fund supports feature-length drama and documentaries. Designed to attract large-scale inbound productions, the Production Growth Fund incentivises employment opportunities for Scottish crew, producers and production facilities, to maximise direct economic benefit to Scotland. A broadcast content fund is also offered to support Scotland's broadcast production sector with single-project or slate development and production.

Wales

With Cardiff cited as the third largest film and TV cluster in the UK, (Fodor, Komorowski, & Lewis, 2021) after London and Manchester, production activity is a significant contributor to the Welsh economy. Wales has a long-established broadcaster presence - BBC Cymru, S4C and ITV Cymru Group which includes Boom, Gorilla and Bait Studio - alongside a varied pool of successful independent production companies, including Avanti, Bad Wolf, Jojo, Little Door Productions, Severn Screen, Triangl and Vox Pictures.

The BBC's Roath Lock Studios at Cardiff Bay house drama productions such as *Doctor Who* and *Casualty*, and the long-running Welsh-language continuing drama *Pobol y Cwm*. Other dedicated facilities include four large studio complexes in south Wales, all situated along the M4 corridor - Bay Studios near Swansea, Dragon Studios close to Bridgend, Great Point Seren Studios just east of Cardiff, and Wolf Studios situated close to Cardiff city centre. With the establishment of Bad Wolf and Wolf Studios in 2015 came the ambition to build a global production hub.

Beyond Cardiff's city region, two further creative clusters are recognised in Wales, one in the north west and another in the south west, as described in the recent Screen Survey Wales report (University of South Wales, 2022). Considerably smaller in size than the Cardiff cluster, these hubs largely serve the broadcasters, with unscripted production - mainly factual and factual entertainment genres - being the principal output of companies outside of the Welsh capital.

Production services support is offered by Creative Wales, with free-to-access advice on locations, freelance crew, facility companies and filming in Wales. It has provided production funding (though this is currently under review) to support indigenous and inbound film and TV productions, helping to maximise a production's impact on the local supply chain, economy, and crew and talent development, including the encouragement of apprenticeships and training. Supporting inclusivity and diversity in the screen sector workforce, Creative Wales is also working with Watch-Africa Cymru's Culture Connect Cymru/Wales (CCC)³ project, in which the four main broadcasters are also partners.

The portfolio of drama filmed recently in Wales includes *A Discovery of Witches*, *Darkness Rising*, *Extinction*, *Havoc*, *Hidden*, *His Dark Materials*, *Industry*, *Keeping Faith*, *Roald and Beatrix*, *Sex Education*, *The Birth of Daniel F Harris*, *The Lazarus Project*, *The One*, *The Pact*, *We Hunt Together*, *Willow* and *Wolf*.

England

While scripted production in England has been dominated by activity within and surrounding Greater London, the recent fast-paced growth has pushed out to the regions, enabling many hubs to benefit from increased inward investment and volume of production. At a national level, production liaison support to feature film and HETV productions in England, outside of London, is delivered by Creative England (recently merged within Creative UK). Under the Filming in England banner, this includes searchable crew and facilities databases, information on studios and build spaces, and signposting to more local assistance filming within the English regions, including film offices and local authorities. The service also supports local authorities to become 'film friendly' while maximising local employment opportunities and economic benefit. This includes a filming in England code of practice, location filming strategies and fee setting, and a screen tourism toolkit. Film London is responsible for providing similar dedicated support in the capital.

East of England

Infrastructure and support for scripted production in the East of England vary significantly, with the west of the region housing long-established and large-scale facilities within easy reach of London. Hertfordshire houses Warner Bros. Studios Leavesden (with extra build space at the adjacent Hill Farm Studio), and BBC Studioworks' Elstree Studios and Elstree Centre, serving some of the UK's highest profile unscripted entertainment along with long-running BBC drama *Eastenders*. Sky Studios Elstree, a new state-of-the-art film and TV studio, is due to open in late summer 2022. A further film studio complex, Sunshine Studios, is in development nearby, which will be the first Sunset Studios operation outside of the US and planning is underway for Hertswood Studio which could be the single largest film studio in the UK. Further north, Cardington Studios near Bedford, renowned for its 55m height, is one of the largest indoor spaces in Europe. Blockbuster features such as *The Batman*, *Fantastic Beasts: The Secrets of Dumbledore*, *Fast and Furious 9* and *Paddington* were filmed in this part of the region, along with HETV such as the first three seasons of Netflix's *The Crown*.

By contrast, further east the region is less well equipped to support high-end studio production. In Norfolk, Raynham Hangar Studios offers substantial build space on the site of a former airbase and is earmarked for development to provide a fuller service of facilities led by crew and facilities outfit The Norfolk Film Company. Serving smaller scale production is Epic Film Studios' broadcast facility. Fewer facilities but sought-after landscapes and buildings mean that location filming is more prevalent for scripted production in Norfolk, along with its neighbouring county Suffolk, as shown by recent productions *Spencer*, *The Crown*, *The Dig*, *The Phantom of the Open* and *The Souvenir Part 2*. To encourage and support production on the ground, Film Suffolk has a dedicated film office, while Norfolk has a volunteer-run film office. Both counties are seeking to build more sustainable production hubs, with Norfolk having made recent steps to first formalise a film office

³ See [Culture Connect Wales](#)

(Olsberg SPI, 2022). Local independent scripted production companies include October Studios and Eye Film, along with related commercial companies Ember Films and Trett Films.

To the south of the region, and closer into London, Purfleet's Backstage Centre in Essex offers a purpose-built sound stage and local production services support from council-operated Filming in Thurrock. Further studio development in the area has been long mooted, with planning permission granted as part of the ambitious Thames Estuary Production Corridor, linking south Essex and the north Kent coast with east London.

East and West Midlands

With strong competition for warehousing and distribution space in this central part of England, the Midlands offers little studio or build space of scale for scripted production, despite its good travel links and in-demand locations. TV series *Dark Money*, *Man Like Mobeen*, *Peaky Blinders*, *Redemption*, *Small Axe*, *Stonehouse*, *Three Little Birds* and *You Don't Know Me* have filmed there, along with features *Enola Holmes*, *How to Build a Girl*, *My Name is Leon*, *Raging Grace*, *Ready Player One* and *The Colour Room*.

More facilities are available to scripted production in the West Midlands than the East Midlands, including BBC's Drama Village, home to the long-running daytime drama *Doctors*, based at and around University of Birmingham's Selly Oak campus. Moreover, in the west of the region, Sky Blue Studios is an innovative 'sustainability-first' facility in Coventry, focused on film, TV and immersive production. The NEC Group offers build space and locations within and surrounding the National Exhibition Centre. Further east, Kinetics Group offers a multipurpose studio space near Corby housing one of the largest infinity cove⁴ studios in the UK. Scripted production companies are fewer on the ground than unscripted and include Mockingbird Film Co in Stourbridge and Nottingham-based Wellington Films.

Significant developments are underway to develop a more permanent fit-for-purpose Midlands production hub. Close to central Birmingham, the Digbeth.Loc film and TV studios development (formerly known as Mercian Studios) is due to be operational from 2023/24 as part of a wider creative content hub, driven by *Peaky Blinders* creator Steven Knight, intending to serve scripted production and TV entertainment. Also planned in the city is the Four TV Studios development by Quartermaster at Birmingham City University.

Film Birmingham, operated by Birmingham City Council, provides local support for productions, including crew, locations and facilities services. Dedicated film support is also offered by other local authorities and related organisations in the region including Nottingham City Council and Visit Leicester. Create Central is a member-led industry body whose remit covers film, TV, games and other creative content sectors. Its aim is to work with national and regional partners to create to boost the Midlands screen sector.

To help attract high-end feature film and TV drama to the region, Creative UK manages the West Midlands Production Fund. This legacy fund was originally set up with European Regional Development Fund support, and now invests recouped finance into productions that will benefit the local economy.

London and South East England

Greater London and the wider South East region have the largest concentration of studios and build spaces in the UK, with new sites due to open, in development and in planning. As such, it would not be viable to cover the whole picture within this introductory piece. Therefore, this is a limited summary to provide basic context as a backdrop to our research findings.

⁴ A space with no corners, designed to give the impression that the background of an object extends to infinity; used in various forms of image capture including stills photography, film and TV.

Within the London area, studios include 3 Mills, Ealing, East London, Garden, OMA, Ridgeway, Troubadour, The Mill, Twickenham, West London and Wimbledon. Recently opened RD Studios is one of the largest film production facilities in London, and Eastbrook Studios at Dagenham is among those in development. Netflix has reportedly leased speculative units at SEGRO Park Enfield. With future technology in mind, Indie-Zero is opening a state-of-the-art, purpose built VFX studio facility in South East London, and Mo-Sys has announced plans to build UK headquarters as a redevelopment of The Plumstead Power station in the borough of Greenwich, including virtual production (VP) stages and a research centre.

In neighbouring counties, Buckinghamshire is home to long-established Pinewood Studios, while Surrey houses Shepperton, Longcross, Black Hangar and Farnborough studios, and nearby in Berkshire, Stage Fifty's newest UK development Winnersh Film Studios joins the county's existing studios at Bray and Shinfield. Building on its history of games production and motion capture technology, Rebellion Film Studios is now seeking to bring cutting-edge film and TV production into its Oxfordshire-based operation. In Kent, Maidstone Studios offers the UK's largest regional independent TV broadcast facility, and there are long-held ambitions to develop further studio space as part of the aforementioned Thames Estuary Production Corridor, which would link the north Kent coast and south Essex with east London.

While Creative UK's Filming in England team offers production liaison services outside of Greater London, Film London provides support to productions based or filming in London, including a code of practice, help with location-finding, and a film-friendly filming partnership scheme. Its Green Screen programme is a social enterprise set up to support environmentally sustainable filming practice, offering guidance to help productions estimate and reduce their carbon footprint.

The BBC has its headquarters in London's Broadcasting House, with further sites around the city including White City's Television Centre and Acton's Park Western. ITV, Sky and Channel 5 all have London headquarters. More recently, Amazon Prime, Netflix and Apple TV are among the other commissioners that have opened offices in the city and wider region.

Recent productions based and filming in London and the wider South East region have been numerous. They include series *Call the Midwife*, *Everyone's Enemy*, *Luther*, *Our Man From Jersey*, *Ted Lasso*, *The Ballad of Renegade Nell* and *The Diplomat*; and features *Ant-Man and the Wasp*, *Damsel*, *Downton Abbey: A New Era*, *Empire of Light*, *Heart of Stone*, *Magic Mike's Last Dance*, *Red*, *White and Royal Blue* and *The Flash*.

North West England

With established and growing production hubs in Liverpool's City Region and Greater Manchester, the North West was noted by Creative UK as the busiest region within its production services support remit at the time of writing. This was attributed largely to an increase in HETV production, with which local film offices Screen Manchester and Liverpool Film Office concur. Having two continuing dramas based in the region, plus several long-running returning series, has been key to growing a strong workforce and infrastructure in the North West, making it well placed to step up to the recent boom in production. These two city regions dominate production in the wider North West region, with activity of scale in the more northern counties Lancashire and Cumbria being mainly location shoots based in the Greater Manchester studios and hubs.

Recent large productions in the North West include series *Maternal*, *Peaky Blinders*, *Sexy Beast*, *Stay Close*, *The Irregulars*, *The Ipcress File*, *The Responder*, *The Rising*, and *Waterloo Road*. The region is home to established scripted production companies including AbbottVision, Big Talk North, Channel X North, Hurricane Films, Kudos North, LA Productions, Lime Pictures, Mad As Birds Films, Red Production Company and Quay Street Productions (part of ITV Group). The BBC played a key role in catalysing the development of MediaCityUK with its 2011 move to the new Salford Quays site. ITV moved its Manchester city operation to MediaCityUK in 2013, including the

relocation of *Coronation Street's* production centre. Dock10 - which houses the UK's biggest multi-camera TV studio - is also located at the hub.

Manchester's purpose-built studios for film, TV and commercials, include Space Studios, Sharp Project and the recently opened Manchester Studios, a conversion of the former ITV Granada Studios. Among its facilities, Manchester Studios has dedicated virtual production space, and is one of several developments locally to embrace changing technology. Recode XR at Trafford Park is a dedicated XR and VP studio, and in nearby Stockport, two studios have also been built to serve virtual production.

There are ambitions to grow Greater Manchester's content production facilities, with the BBC and Space Studios planning to expand their existing respective operations. In addition, the ICON development at Manchester airport is seeking to house around 2,000 people working in video production and photography. Local film office support for Manchester is provided by Screen Manchester, covering all types of production seeking permission to film on location within the city centre boundary.

To the south west of Manchester, Cheshire's Tatton TV & Film is a studio complex that recently hosted series *The Rising* and *Wolfe*. Further west in Liverpool, the redevelopment of the Littlewoods site, close to the city centre, into a studio complex is underway. Meanwhile pop-up sound stages, The Depot, opened in late 2021, to temporarily serve the area. Lime Pictures' long-running drama *Hollyoaks* also has its stages in the city's suburbs. Liverpool Film Office is the most established in the UK, (opening in 1989). Alongside production support services, it manages a production fund to attract productions - local and inbound - to film in the city region. The fund aims to help secure wider economic benefit for the locality and lever employment opportunities for local crew and trainees.

West and South West England

Located in south Bristol, the Bottle Yard Studios is the largest dedicated film and TV studio facility in the West and South West. Currently undergoing expansion, three further stages are set to be opened later in 2022 and productions are also using a wider array of sites around the city including Filton Airfield. Bristol has long been a creative hub, world-renowned for its animated output, including Aardman Animations, and its natural history programming, including BBC's Natural History Unit. Scripted production in Bristol became sporadic following the relocation of the long-running series *Casualty* to Cardiff in 2011 but is now enjoying a resurgence since the development of the Bottle Yard. Wall to Wall West, a regional office of the London-based production company owned by Warner Bros., opened in Bristol in 2017, and – as part of its move from London – Channel 4 set up a creative hub in 2019. In a bid to support this momentum, an alliance of producers and executive producers came together as Bristol Screen Producers to encourage new and emerging talent and strengthen the region's ability to win commissions.

In the digital realm, Watershed is also home to Pervasive Media Studio and Bristol's VR Lab, drawing on the city's strong expertise to promote the development of virtual, augmented and mixed reality technology.

Bristol Film Office and Bath Film Office offer support with filming locations and permits. Productions based in the area recently include series *Bridgerton*, *Chloe*, *Rain Dogs*, *Sanditon*, *Showtrial*, *The Girl Before*, *The Last Bus*, *The Outlaws* and *The Pursuit of Love*.

To the far south of the extended region, Screen Cornwall is working to grow the screen sector in Cornwall and the Isles of Scilly. Led by film, TV and digital producers, activity is funded predominantly by Cornwall Council and the Local Enterprise Partnership. It provides a range of production services, including a local crew database, and offers support to local filmmaking talent including Cornish language (Kernewek) film.

Film Plymouth is a partnership between Plymouth City Council and Creative UK to develop production services and encourage feature film and HETV to the city, building on the relatively small but long-established unscripted and digital production hub, home to TwoFour Group, part of ITV, and Denhams Digital. With sought after locations, further film support is offered throughout the region by local authorities, including Torbay, Exeter and Gloucester. Recent productions filming in the region include TV series *Doc Martin*, *Poldark*, and *The Pembrokeshire Murders*, and features *Ammonite*, *Aquaman: The Lost Kingdom*, *Bait*, *Fisherman's Friends*, *Persuasion* and *Wonka*.

Yorkshire and North East England

Home to ITV's long-running *Emmerdale*, Leeds offers studios and facilities at Prime Studios, Studio 81 and the more recently opened Versa's Leeds Studios. A further boost to the city's screen profile came from the relocation of Channel 4's national headquarters (Channel 4, 2018). The surrounding area provides build space for scripted production including Church Fenton towards York, North Light Film Studios near Huddersfield, and, in South Yorkshire, Peregrine Film and Television Studio and the multipurpose Production Park. Rollem Productions, Warp Films and Duck Soup films remain in the minority as scripted production companies in the region alongside a thriving core of factual and digital content makers.

East to the Humber, The Northern Studios in Hartlepool - a wholly owned subsidiary of The Northern School of Art - has been developed as the only large-scale television and film studio complex in the North East. In late 2021, the BBC committed to investing at least £25m over five years across the North East to support network TV production, talent development and wider growth for the region's creative sector including a new BBC tech hub in Newcastle. It is hoped that this new infrastructure will enable the north-eastern counties to build on the transient production attracted by its wide-ranging locations. Production of scale in Northumberland and County Durham is location-based.

Two established regional screen bodies support production in the extended region - Screen Yorkshire in Leeds and Northern Film and Media in Newcastle. Both offer production services liaison, including crew and locations databases. Further local support is provided through dedicated local authority film offices around the region including York Film Office. Screen Yorkshire additionally offers a content fund - covering TV, film, video games and digital production - open to producers based in, or wishing to film or establish a base in, Yorkshire and Humber. Both bodies also deliver screen training locally.

The region's screen credits include *All Creatures Great and Small*, *Gentleman Jack*, *Hullraisers*, *The Gallows Pole* and *Vera*; and feature films *Ali and Ava*, *Birchanger Green*, *Blue Jean*, *Hope Gap*, *Sorry We Missed You*, *Starve Acre*, *The Duke*, *The Railway Children Return* and *Typist Artist Pirate King*.

Findings

Despite the varying levels of scripted production activity and infrastructure between nations and regions, there appears to be little discernible difference in overall skills needs, issues or desired actions across the UK at present. Interviewees from productions and agencies/bodies perceived that the issues are simply compounded in smaller or developing production hubs. Where distinct variances occur, these are mostly related to specific place-specific factors such as uncertainties related to the Northern Ireland Protocol, Welsh language fluency or the challenges of accessibility due to the large geographical area within a nation or region.

From a sub-sector perspective, there is again little difference but with issues being intensified at lower budget levels. In other words, children's, other scripted TV and independent film are most feeling the squeeze from crew shortages. Even within HETV, there appears to be a higher level of challenge perceived at the lower end of the qualifying budget band.

Before looking at the findings in more detail, it is worth noting that crew and skills shortages are not the only pressures facing production. This report focuses on findings related to the workforce, but, where appropriate, some observations have been included that highlight commercial or cultural factors that are interacting with, and sometimes exacerbating, crew- and skills-based issues. For example, the increase in bigger-budget, longer-running drama has affected the size and shape of crews, the way in which people work and the time freelancers have between productions. Similarly, many mentions were made of the difficulties experienced by productions in finding available studio space, locations, facilities and hire equipment. In more extreme cases, this has reportedly led to delays in productions starting, which in turn can present further challenges in finding or retaining crew.

Approaches to hiring

Summary points

- **No differences in hiring practice were identified between nations and regions, or scripted sectors.**
- **Word-of-mouth remains the dominant method of finding crew and was reported widely across the UK.**
- **The need for speed and trust in hiring was cited as the main reason this practice prevails.**
- **The boom in scripted production across the UK has necessitated looking more widely for crew, but conversely has shortened the timeframe within which to crew up.**
- **Crew across the UK appear to be moving less often between scripted sectors, prioritising long-running, well-paid opportunities offered by HETV over lower budget film, children's and other scripted TV.**

Regardless of their nation or region, the vast majority of interviewees reported using word-of-mouth within a known network as their main approach to recruitment. There were no distinct trends. The prevalence of informal hiring practices has long been acknowledged within scripted production. Its continuation was reiterated across the production sample, who typically described hiring heads of department (HoDs) who are then in turn responsible for crewing their respective teams.

The next most common hiring methods, all reported to similar degrees across the UK though far less often than word-of-mouth, were to:

- Reach local crew via dedicated social media groups, eg via Facebook or WhatsApp
- Prioritise returning crew (for series)
- Use trainee schemes, eg ScreenSkills Trainee Finder, Sgil Cymru, Screen NETS, SharpFutures
- Interview people recommended by others
- Use online crewing databases

A very small minority mentioned seeking help from the local film office, contacting local universities or colleges for entrants, keeping on the best people from work experience to fill entry roles, or advertising entry roles via training networks, such as Screen Alliance Wales.

Most of the hiring methods reported are not conducive to increasing access and inclusion, as they rely on candidates knowing where and how to find opportunities. However, it is clear from industry's engagement with training initiatives, such as those mentioned above, that an openness to employing people from outside of their networks is very much evident. The reason for word-of-mouth recruitment persisting as the prevalent practice - particularly when hiring above trainee level

- is due to a need for need for speed and trust. Productions usually have a short timeframe, ie the gap between a production being commissioned and starting. Therefore, drawing from an established network of crew, who are known to be a suitable fit for the role, team and production has many advantages. Several interviewees also observed that while the increased busyness of scripted production across the UK had necessitated looking more widely for crew, it had shortened the available window within which to crew up, thereby exacerbating the word-of-mouth response.

To identify other factors that may affect hiring, production interviewees were also asked whether local crew tend to be working in one scripted sector, or across several, as production booms. Historically, there has been a common perception that crews outside London/South East were more likely to work across sectors, due to less regular production throughout the nations and regions. Interviewees outside of London most commonly observed that while crew used to move between sub-sectors, sometimes taking commercials or corporate work between longer film or TV jobs, most were now sticking to higher budget drama once they had successfully broken in. This is something which many noted has been much easier to achieve due to the increase in HETV. In the words of one interviewee:

"More of the bigger TV series means more opportunity as returning crew." - Scotland

Regardless of their view, many interviewees pointed out that taking the best-paid, longest-running work available and/or following an HOD to a job were the main influencing factors as to how crew prioritise projects, reinforcing the popularity of HETV drama work when available. Several interviewees observed that the likelihood of moving between scripted sub-sectors can also depend on the job role. Production grades were considered as least likely to move due to greater variation in production practices - and therefore required knowledge and experience - between sub-sectors. Craft roles were deemed more likely to move between sub-sectors, having the most readily applicable skills.

Diversity and inclusion

Summary points

- **Most interviewees felt that ethnicity, disability and/or working-class talent and crew are least represented in their local screen workforce, regardless of their location.**
- **Welsh-speakers are additionally under-represented among crews in Wales.**
- **The lack of studios and facilities of scale for high-end production in the West Midlands - the region with the second highest non-white population in the UK - is deemed to be inhibiting the ability to develop an ethnically diverse local crew base.**
- **Gender imbalance is still perceived in some craft and technical roles across the UK.**
- **Communicating the range of careers and prospects in screen to people from all backgrounds and cultures is perceived as the most important way to improve diversity.**
- **Hard-to-meet, commissioner-set diversity quotas present challenges outside of London and are considered by some to be hindering local crew development.**
- **Physical accessibility to and within production workplaces needs to be improved to support greater inclusion for disabled talent.**
- **Lack of transparency and open-mindedness in hiring is also believed to be hindering diversity and inclusion.**

Before looking more deeply at these findings, it is worth considering the interconnectedness between representation within the workforce and industry hiring practices. As a recent scoping

report undertaken for the Screen Industries Growth Network (SIGN) in Yorkshire and the Humber points out (Ozimek, 2021), the issue of inequality and discrimination in the local film and television industries may be linked to the preferred practice of looking to existing connections and networks. Findings in this study indicate that the region-specific problem identified in the SIGN report is likely to be occurring UK-wide. According to responses from production and agency/body interviewees, the recent growth in scripted production does not appear to have significantly improved representation among crews.

Least represented groups

In terms of under-representation, most interviewees across the UK felt that their local workforce lacked Black, Asian, minority ethnic or disabled crew and/or those from a low socio-economic background. There was only very minor geographical variation. Perhaps most striking to note is the Midlands, whose interviewees overall reported people from Black, Asian and minority ethnic backgrounds as least represented among the local crew base, despite the West Midlands having a very ethnically diverse local population⁵.

Some interviewees in the North West, Scotland, Wales, West/South West and Yorkshire/North East gave the caveat that their awareness of overall diversity could be skewed by pressure from commissioners to hire Black, Asian and minority ethnic crew. In other words, they have been much more focused on addressing that specific area of representation than any other.

Several interviewees gave further instances where they had observed under-representation locally and more generally. In Northern Ireland, a lack of older crew had been observed by one interviewee. Some responses from across the UK noted a persistent gender imbalance in certain departments. Most commonly cited examples were too few women in technical roles such as grip and lighting technician, and too few men in hair, make-up or costume roles. In Wales, fluent Welsh-speakers were largely felt to be under-represented among crews - a concern that was recently highlighted across screen sectors in the Screen Survey Wales report (University of South Wales, 2022), and is of key importance to broadcaster S4C which is required to comply with standards in relation to the Welsh language and offer the opportunity to access Welsh language content of all genres (S4C, 2021). The lack of Welsh-speaking crew is a multi-faceted issue that is manifest not just as under-representation, but also as a skills shortage and a skills gap in the workforce, as the findings later reveal (see p. 37).

Barriers to overcome

Despite varied responses, as set out in Table 1, when asked to identify challenges to improving representation among local crew, none of the interviewees identified factors that were specific to a nation or region. A large majority, regardless of their location, felt that communicating vocations and prospects in the industry to people from all backgrounds and cultures is the biggest barrier to improving diversity. An ongoing need to build confidence and trust around careers in the industry at a UK-wide level was extensively acknowledged, with many adding that a joined-up approach, ie between the screen industry and supporting screen bodies, is needed to ensure that people are informed about opportunities from school-age upward.

Interviewees in the Midlands and the East of England added that the lack of a significant large-scale studio or production hub in their region⁶ could be preventing opportunities to develop and retain local crew regardless of their characteristics (as we explore later within this report, see p. 28). For those based in the West Midlands, this was noted as a particular frustration given the great potential to grow an ethnically diverse local workforce from within the local population.

⁵ ONS Annual Population Survey October 2020-September 2021 indicates that 17.3% of the West Midlands population is non-white, the second highest area of Black, Asian and minority ethnic representation after London (35.8%), and against a UK-wide figure of 12.8%.

⁶ Warner Bros. Studios Leavesden is located in the East of England, but the size of the region means that it is a significant distance from other areas of the east such as Norfolk and Suffolk, and is much closer to - and accessible from - the Greater London area.

While diversity quotas set by commissioners and investors cover a wide range of characteristics, interviewees from most nations and regions considered there to be a disconnect between targets for Black, Asian and minority ethnic crew and local populations in many parts of the UK. Several expressed concern that this could ultimately have an adverse impact on the development of local crew, noting that it was common to bring people from other geographies or take on someone who was not the right professional fit just because of their ethnic background.

"Commissioners need to stop setting diversity quotas that don't match the local population - it's sending regionality backwards." - West/South West

"It [pressure to meet diversity quotas] doesn't help people to develop as they might not be ready for the role or have the support they need." - East of England

Challenges caused by inaccessible working environments were also raised widely. Some interviewees reported having insufficient time and resources to make sets and trailers accessible to crew with mobility needs.

Other interviewees spoke of financial barriers to getting into and working in the industry such as the need to have a driving licence and own a car. Interviewees in London/South East, Scotland and Yorkshire/North East also commented on the difficulty faced by many people in rural parts of the UK who do not have easy access to a local production hub and therefore are not exposed to the breadth of opportunities that may be available elsewhere.

Lack of transparency and open-mindedness in hiring crew was also a common theme, reflecting the SIGN scoping report (Ozimek, 2021). Interviewees in London/South East, North West, Northern Ireland, Scotland and Wales believed that current recruitment practices, favouring word-of-mouth connections, may be hindering diversity and inclusivity in the workforce.

Table 1: Perceived barriers to greater diversity and inclusivity within scripted production by theme and where the concern was reported

Theme 1: Managing to reach a wider pool of potential talent	
Insufficient signalling that industry is open to people from all backgrounds	<ul style="list-style-type: none"> All nations and regions
Absence of a joined-up approach from the whole industry to get traction	<ul style="list-style-type: none"> All nations and regions
Difficulty reaching young people from an early age, ie school	<ul style="list-style-type: none"> All nations and regions
Tendency towards reactive schemes instead of strategic approaches	<ul style="list-style-type: none"> East London/South East Wales

Theme 2: Challenging targets	
Meeting diversity quotas in some nations and regions is unrealistic	<ul style="list-style-type: none"> East London/South East North West Northern Ireland Scotland Wales West/South West

Theme 3: Lack of accessibility		
Having time/budget to make the working environment accessible, eg ramps, lifts	<ul style="list-style-type: none"> • London/South East • North West • Northern Ireland 	<ul style="list-style-type: none"> • Scotland • Wales • Yorks/North East
Making it more affordable for people to access and build a career is challenging, eg cost of transport to access locations, cashflow between freelance jobs	<ul style="list-style-type: none"> • London/South East • Northern Ireland • Scotland 	<ul style="list-style-type: none"> • Wales • West/South West • Yorks/North East
Having time/budget to take an individual's needs into account	<ul style="list-style-type: none"> • London/South East • North West 	<ul style="list-style-type: none"> • West/South West • Yorks/North East
Enabling people in rural parts of nations/regions to connect with work and training opportunities	<ul style="list-style-type: none"> • London/South East • Scotland • Yorks/North East 	

Theme 4: Non-inclusive hiring practices		
Making hiring transparent and open-minded	<ul style="list-style-type: none"> • London/South East • North West • Northern Ireland 	<ul style="list-style-type: none"> • Scotland • Wales

Lastly, it is worth highlighting three broader concerns raised across many of the nations and regions relating to attitudes to diversity within scripted production as the sector undergoes significant growth:

- Firstly, it was feared that commissioners and productions often fail to acknowledge the breadth of under-representation that needs to be addressed in the industry, focusing on some characteristics to the exclusion of others. This was especially noted in relation to socio-economic disadvantage, which some interviewees perceived to be a low concern in commissioners' targets yet is a priority to address in many local authorities such as London boroughs⁷ and many of the UK's coastal towns and cities. Similarly, disability, which itself is a very broad term, was felt to be under-acknowledged. Interviewees in Northern Ireland also noted the local need for appropriate representation of Protestant and Catholic crew as part of ensuring inclusivity.
- Secondly, several interviewees were also worried that diversity may have become "a need to tick a box", rather than investing in individuals to help them build a sustainable, long-term career in the industry.
- Thirdly, it was felt that some negative or patronising perceptions persist around regional crew, regional accents and people from working-class backgrounds, which may be preventing some people from entering or progressing in a production career.

⁷ For example, as set out by Barking and Dagenham Council in its corporate plan (LBBD, 2020)

Skills shortages

Summary points

- Crew shortages are evident across the UK, with production office roles such as production manager and production accountant most often cited as in demand.
- More similarities than differences were noted among nations and regions, with no significant discernible patterns.
- Smaller production hubs may have a compounded situation due to the volume of scripted production growing faster than the local crew base.
- Most interviewees attributed shortages to the increase in SVoD-commissioned high-end dramas, which hire bigger crews and offer higher pay rates and longer runs.
- Crew burnout, loss of 'traditional' training grounds and inbound productions not prioritising local crew are also perceived as contributing to shortages.
- The majority of interviewees observed too many people at all levels with inadequate experience, regardless of nation or region.
- Local above-the-line talent is becoming more critical to maintain and strengthen indigenous production, particularly in the nations and regions.
- Stepping people up is the most common response to tackling crew shortages, reported across the UK. A reliance on experienced crew to provide support for those less experienced, or cover shortage-related gaps, is also common.
- Few interviewees reported offering support such as training or flexible working to help support and retain crew; interviewees in Wales most reported doing so.
- Taking on transferers from other screen, creative/arts or unrelated sectors is appealing to many and is already being tried around the UK, particularly for craft and technical roles.
- Training to help people transfer into scripted production is deemed by many as essential to a successful transfer.
- Interviewees from all nations and regions favour more structured on-the-job training, a joined-up 'standardised' industry approach to crew development, and greater investment in training by bigger companies, including SVoDs.
- Improving awareness of screen job roles and career paths was also considered a priority across the UK.

To ascertain shortages, production interviewees were asked about the roles they always or most often had difficulty filling, ie skills shortages. Agencies/bodies were asked which roles they were most often asked for help in filling.

Shortage roles

While there is some geographical variation in shortages reported, there are more similarities than differences and no significant discernible patterns. Production management roles account for half of the combined UK-wide shortages reported and largely dominate the nations and regions lists. This includes roles such as production manager, production accountant, production coordinator, line producer, location manager and 1st assistant director. However, shortages were also reported across craft and technical departments, including art director, grip, standby art director and set decorator. Table 2 shows the range and breadth of skills shortages reported by interviewees. It is worth noting that this was an open-ended question for respondents to identify what they thought were the most severe shortages. The number of times a role was mentioned is shown in brackets but, because of the nature of the open-ended questions, we cannot confidently rank these shortages in terms of severity. The make-up of the production sample will also have influenced the frequency with which some roles were mentioned, as there were more interviewees from production management, art and costume departments than others. Therefore, the ranking of difficulty is only indicative on that basis. As one interviewee summed up:

"Whoever you speak to on a given day, there's another role they can't find." - Wales

Except for the East of England, all nations and regions show a mix of production, craft and technical roles. The difference in the East is probably due to that sample representing production and location roles. No clear differences appear between scripted sub-sectors. Among interviewees who worked across or supported two or more scripted sub-sectors, the large majority thought that the shortages were the same across all those sub-sectors, regardless of nation or region.

Table 2: Shortage roles in scripted production reported by nation or region; shortage roles listed in order of most frequently mentioned

Devolved nations		
Northern Ireland	Scotland	Wales
Line producer (4) 1st assistant director (3) 2nd assistant director (3) Production manager (3) 3rd assistant director (2) Script supervisor (2) 2nd assistant camera (1) Art director (1) Assistant production accountant (1) Cashier (1) Director (1) Director of photography (1) Editor (1) Focus puller (1) Gaffer (1) Lighting technician (1) Producer (1) Production accountant (1) Production coordinator (1) Standby art director (1) Supervising art director (1)	Production accountant (3) Carpenter (2) 1st assistant director (1) 2nd assistant director (1) Art dept. assistant (1) Art director (1) Assistant art director (1) Cashier (1) Construction manager (1) Costume maker (1) Draughtsperson (1) Graphic designer (1) Grip (1) Lighting technician (1) Line producer (1) Location manager (1) Plasterer (1) Producer (1) Production coordinator (1) Production manager (1) Rigger (1) Scenic painter (1) Set decorator (1)	Production coordinator (3) Production manager (3) 1st assistant director (3) 2nd assistant director (2) Assistant costume designer (2) Costume maker (2) Production accountant (2) Script supervisor (2) 3rd assistant director (1) Cashier (1) Colourist (1) Costume daily (1) Costume designer (1) Covid-19 assistant (1) Covid-19 manager (1) Covid-19 supervisor (1) DIT (1) Editor (1) Focus puller (1) Grip (1) Hair and make-up artist (1) Hair and make-up designer (1) Intimacy coordinator (1) Location assistant (1) Location manager (1) MCR operator (1) Production assistant (1) Production designer (1) Production secretary (1) Set decorator (1)
English regions		
East & West Midlands	East of England	London & South East
Production manager (2) 1st assistant director (1) Art director (1) Camera assistant (1) Focus puller (1) Grip (1) Lighting technician (1) Line producer (1) Production accountant (1) Production coordinator (1) Production secretary (1) Script supervisor (1)	Line producer (1) Location assistant (1) Location manager (1) Location scout (1) Production accountant (1) Production manager (1)	Production manager (7) Location manager (6) Production accountant (6) Production coordinator (6) Line producer (5) 1st assistant director (3) 2nd assistant director (3) Production secretary (3) 3rd assistant director (2) Covid-19 supervisor (2) Editor (2) Location assistant (2) Prop master (2) Script supervisor (2) Art dept. assistant (1) Art director (1)

		Covid-19 assistant (1) Covid-19 manager (1) Graphic designer (1) Historical researcher (1) Location scout (1) Producer (1) Prop daily (1) Prop hand (1) Standby art director (1) Standby prop (1) Unit manager (1)
North West	West & South West	Yorkshire & North East
Production coordinator (4) Production accountant (3) Assistant production accountant (2) Cashier (2) Grip (2) Location manager (2) Production manager (2) 1st assistant director (1) Art director (1) Camera assistant (1) Costume designer (1) DIT (1) Executive producer (1) Line producer (1) Location assistant (1) Make-up designer (1) Producer (1) Production assistant (1) Prop hand (1) Standby art director (1)	Grip (2) Line producer (2) Production accountant (2) Production manager (2) Art director (1) Focus puller (1) Location manager (1) Medic (1) Production coordinator (1) Set decorator (1) Standby art director (1)	Art director (2) Production coordinator (2) Production manager (2) Production secretary (2) 1st assistant director (1) 2nd assistant director (1) Art dept. assistant (1) Costume designer (1) Costume maker (1) Covid-19 assistant (1) Covid-19 manager (1) Covid-19 supervisor (1) Crowd supervisor (1) Gaffer (1) Grip (1) Hair and make-up artist (1) Hair and make-up designer (1) Lighting technician (1) Location assistant (1) Location manager (1) Production accountant (1) Production assistant (1) Production runner (1) Script supervisor (1) Set decorator (1) Standby art director (1) Standby prop (1)

Note: A combined UK-wide table of shortages is given in Appendix 1.

To try to explore the shortages at a more geographical level and identify correlation, discrepancies and persistence, findings from available local research in Scotland, Wales and Yorkshire were also reviewed⁸. One common discrepancy occurs when looking at these recent studies - all reported shortages of senior or above-the-line roles to a greater extent than within this study. This is likely due to the different make-up of the research samples. This study spoke to a higher volume of HETV and/or peripatetic production representatives who may have been more focused on securing below-the-line crew.

Prior to the Covid-19 pandemic hitting the UK, Skills Development Scotland commissioned Scotland's Screen Skills Research (Screen Scotland, 2019). Produced in partnership with Screen Scotland and Creative Scotland, the report sought to understand more about the Scottish screen workforce, including hard-to-recruit and in-demand roles. Its findings point to the same shortages identified in Table 2. Little appears to have changed in the three-years since it was published. In the intervening period, the Covid-19 hiatus and subsequent production boom are likely to have exacerbated the local situation. However, the Scottish report also pointed to a local need for senior

⁸ In some instances, these reports combine scripted and unscripted roles within reported television shortages, therefore some anomalies are to be expected when comparing findings.

roles such as head of development, director and writer. Although not a priority for most of the interviewees within our study, they did not go unmentioned. One interviewee in Scotland summarised the risk of losing local above-the-line talent if independent production is no longer able to support their development:

"Indigenous creative talent - writers, directors, producers - will diminish if indie and lower budget productions get squeezed out. Importantly, they also traditionally provide places for people to learn." - Scotland

Screen Work 2020 (McElroy & Hannah, Future skills and innovation for the Screen Sector in the Cardiff Capital Region, 2021) gathered workforce data from industry and training providers working in the screen sector in the Cardiff Capital Region (CCR) of Wales, which included capturing skills shortages for film and television. It identified shortage roles within these two sectors that reflect many of the findings in Table 2, ie production accountants, production coordinators, art department roles and continuity. However, like Scotland's screen skills research, it offered additional insight into shortages of higher-level roles, including producers, writers, showrunners and senior development executives as being among local priorities. A shortage of producers is further reflected in the more recent Screen Survey Wales (University of South Wales, 2022) report which looks at skills issues in the Welsh film and television sectors beyond CCR and also recognises the need for such business-critical roles to be developed and retained locally. Both reports on the Welsh workforce suggest a shortage of Welsh-speaking crew.

In Yorkshire, Ozimek (2021) similarly identifies production and technical shortages listed in Table 2 within the region's film and television sectors, while again highlighting senior roles that did not surface within this study as being hard to find, such as line producer, producer and script editor in film. While not all nations and regions noted such senior level shortages as most pressing, acknowledgement of a need to develop and retain people to senior and above-the-line levels within production hubs outside of London was a recurring theme among interviewees. This need for key editorial and decision-making talent, alongside below-the-line crew and heads of department, is considered a crucial part of establishing and sustaining a strong and distinct local production hub.

Lastly, it is worth comparing the overall shortages reported with findings in the most recent ScreenSkills Assessment report (ScreenSkills, 2021) and the lately published high-end television workforce research (ScreenSkills, 2022a). While there is some variation between the shortages lists in all three reports, the most frequently mentioned job roles dominate them all, eg production management including assistant director, finance and locations roles, grips. The HETV report uniquely notes some very specific jobs which did not appear in this study or the 2021 Assessment, such as block producer and travel and accommodation coordinator. However, this probably reflects the narrowing of roles on higher budget productions which is highlighted further in this study (see [Reasons for shortages](#) and [Skills gaps](#) sections).

Perception of disparity in shortages between nations and regions

When it comes to shortages variation across the UK, the large majority believed there was no difference between their part of the country and any other, strongly suggesting that shortages were rife across all nations and regions. This perception was based on a variety of experiences, from line producers and heads of department who had worked in more than one geography recently or had contacted networks in other parts of the UK in the hope of finding available crew, to agencies/bodies that had increased levels of liaison with their counterparts in neighbouring areas when seeking crew. However, it should be noted that in some cases responses were based on assumption and/or limited anecdotal evidence rather than direct experience.

Among the majority believing the situation to be same across the UK, several felt that regional hubs, including Belfast, Bristol and Cardiff, may simply have a more compounded situation due to the increased volume of scripted production which had grown faster than the local crew base. The proximity of production hubs to each other and unpredictable production levels could also influence disparity. As one interviewee in the West/South West added, Bristol could develop a disadvantage due to its location, despite doing well at present, as local crew can commute to Cardiff, Pinewood

or Shepperton and may do so if they receive strong offers or if gaps appear in local work. Such circumstances could then exacerbate local shortages, albeit temporarily.

Just a very small minority of interviewees felt that the shortages were worse in their nation or region than elsewhere in the UK, largely attributing this to two interconnected reasons:

- Midlands and Northern Ireland - inbound productions not giving local crew opportunities to develop, thereby causing them to leave for opportunities elsewhere or be stuck at a low or middle level
- East of England and Midlands - lack of an established scripted production hub within which to build a regular flow of production and develop a crew base.

Lastly, it is worth noting that responses from interviewees in Greater London (not including the wider South East) were the most polarised grouping. Some felt that the UK capital and its surrounding commutable area had worse crewing issues than elsewhere in the UK due to being such a large and internationally popular production hub, in constantly high demand. Conversely, others felt that London was in a better position than other geographies as the size and nature of the production base meant that it had more established crew - along with facilities and studios - to help meet demand.

Reasons for shortages

From interviewees around the UK, there were four common themes in the perceived causes of crew shortages, as described in Table 3. The significant increase in production levels in the UK was the dominant theme, with many interviewees from all nations and regions attributing shortages specifically to the increase in large-scale HETV. This boom is likely to have been an aggravating factor in the other three themes - relating to crew, skills and business practice. These are areas within which weaknesses appear to have been exposed by the rapid growth. For example, high rates of burnout among crew, early stepping-up and crew jumping projects were felt to be the result of increased busyness. This was again noted by interviewees across the UK, though most commonly among those in London/South East, North West and Wales. Another theme reported nationwide, though particularly in Northern Ireland, highlighted training and education. Also compounded by the recent boom, too few entrants to meet demand and loss of training opportunities on lower-budget productions - where entrants may previously have learned the ropes - were felt to be affecting the ability to hire enough suitably prepared entrants. The consequences of nations and regions crew being unable to access opportunities to develop locally was deemed by interviewees in the East of England, North West, Northern Ireland and Wales to have been further exacerbated by an increased volume of production.

Table 3: Perceived reasons for crew shortages by theme

Theme 1: High volume of production	
Increase in SVoDs/big budget drama - high rates, long runs, big crew	<ul style="list-style-type: none"> • All nations and regions
Ongoing backlog from Covid hiatus	<ul style="list-style-type: none"> • London/South East • North West • Scotland • Wales • West/South West • Yorkshire/North East
Boom in production generally	<ul style="list-style-type: none"> • London/South East • North West • Northern Ireland • Scotland • Wales • West/South West

Theme 2: Crew-related issues		
Crew burned out and want better work/life balance	<ul style="list-style-type: none"> London/South East North West Northern Ireland 	<ul style="list-style-type: none"> Wales West/South West Yorkshire/North East
Crew progressing too soon - lack breadth and depth of experience	<ul style="list-style-type: none"> London/South East Midlands North West 	<ul style="list-style-type: none"> Northern Ireland Scotland West/South West
Crew jumping shows part-way through; more poaching between productions	<ul style="list-style-type: none"> London/South East North West Scotland 	<ul style="list-style-type: none"> Wales West/South West Yorkshire/North East
Covid-19 created difficult operating environment	<ul style="list-style-type: none"> London/South East North West Wales 	
Crew only gaining narrow experience on bigger productions	<ul style="list-style-type: none"> London/South East Wales 	
Too many inexperienced crew making production process difficult	<ul style="list-style-type: none"> London/South East Northern Ireland 	
'Borrowed' crew moved back to own sector (eg theatre)	<ul style="list-style-type: none"> London/South East North West 	

Theme 3: Training- and education-related issues		
Loss of traditional training grounds from broadcasters	<ul style="list-style-type: none"> London/South East Midlands 	<ul style="list-style-type: none"> Northern Ireland Scotland West/South West
Lack of entrants and training for department, in particular art, construction, costume, production, props	<ul style="list-style-type: none"> East Midlands Scotland 	<ul style="list-style-type: none"> Wales Yorks/North East
Historical industry complacency in hiring, training and retention	<ul style="list-style-type: none"> London/South East North West Wales 	
Too few entering and too many retiring from technical grades	<ul style="list-style-type: none"> North West Northern Ireland 	
Tight budgets at lower end limiting opportunities to gain experience	<ul style="list-style-type: none"> Northern Ireland 	

Theme 4: Commercial and cultural factors		
HoDs from another nation or region bringing own crew; local crew can't develop	<ul style="list-style-type: none"> North West Northern Ireland 	
Result of historical talent drain to London	<ul style="list-style-type: none"> East North West 	
Local crew currently working in another nation or region	<ul style="list-style-type: none"> Northern Ireland Wales 	

Interviewees largely felt that inherently bigger crews and longer contracts, often with better rates of pay, has made the upper band of HETV drama more attractive to the workforce wherever they are in the UK. Instances of crew leaving productions to take up better paid or longer-running contracts was also observed by Screen Work (McElroy & Hannah, Future skills and innovation for the Screen Sector in the Cardiff Capital Region, 2021) in looking at crew shortages in the Cardiff City Region. This practice is becoming commonplace as productions compete for crew. Contextually, three of our interviewees pointed out what follows:

"Art departments are twice the size they were five years ago which makes it harder to find enough people." - Yorkshire and North East

"People are being lost to big budget drama. The volume of work has doubled, there's just not enough people to go around anymore." - Wales

"People leaving for bigger budget productions. It's always been an issue for us, but it's much worse now." - Midlands

One interviewee added that crew challenges caused by the growth in big budget drama had highlighted a lack of foresight and training by production companies:

"We can't expect skilled people to just appear as we get busier and busier. We can blame the market, but there has to be responsibility for planning." - North West

Analysis of the overall responses indicates three significant interrelated factors that are likely to be exacerbating shortages in some hubs. These were pointed out by interviewees outside of London/South East when describing a hard-to-break cycle faced by many nations and regions, and recently exemplified in Olsberg SPI in their report on the screen industries in Norfolk (2022). While these were not deemed by interviewees to be the cause of shortages, they are worth expanding on to gain insight into this additional dimension of the challenges being faced.

The first of these factors was the absence of local studios, sound stages, related facilities and supporting infrastructure, with which to attract large-scale scripted production. This was highlighted by interviewees in the East of England, Midlands and North East. The resulting lack of regular production in those regions and a reliance on relatively short-stay inbound shows (eg coming to use locations) was felt to have created a barrier to building and - critically - retaining a local crew base, particularly those at mid-level. One interviewee for this study summarised the local disparity and its causes:

"That's why we have a mid-level gap - the few more senior people we have moved here after establishing a career, usually in London. The local career path is: entry level, move away to develop your career, then - for some - move back here once you're established." - East of England

Studio developments are currently in planning for the Midlands and North East, as previously mentioned, which may help to remove this barrier in those regions if sector growth continues.

The second factor perceived to be exacerbating local shortages was the tendency of inbound productions to bring crew with them. This was reported in the Midlands, North West, Northern Ireland and Scotland. The resulting lack of opportunities for local crew to progress has long been flagged as a cause of concern in the UK's hubs outside of London and was prioritised in the Northern Ireland Screen's sector transformation plan for 2018-2022 (Northern Ireland Screen, 2018). However, the recent growth in high-budget production was perceived by some interviewees to have worsened rather than improved access to development opportunities for local crew. Those at mid-level seeking to step up or those wanting to move from smaller to larger scale productions were considered most affected:

"Productions tend to bring their own crews. HoDs hire people they know, so local crew don't get the chance to build experience on a wider range of projects or bigger budgets. They have to leave to find opportunities elsewhere or get stuck at a low budget level." - Midlands

The third related geographical factor influencing local shortages was crew leaving the nation or region due to lack of awareness of upcoming local opportunities. This was described by interviewees in the North West, Northern Ireland, Wales and the West/South West. Experienced crew take work in another nation or region - despite significant growth in local levels of production - as they cannot predict the flow of opportunities. The nature of a largely freelance crew and use of multiple filming locations in scripted production means that there will always be an element of this type of movement in the workforce. However, responses suggest that this could be lessened by improved industry intelligence, enabling local crew to make more informed decisions. One interviewee in our sample set out the dilemma that freelance crew face:

"To overcome this, we need to help people know when work is coming. If a production is confirmed in their area for May, then they can risk staying local instead of saying yes to a job elsewhere that starts in April." - West of England

Lastly, it is worth noting from a departmental perspective, a lack of entrants and suitable training provision for art, props, construction, lighting, costume and production management roles were mentioned as a contributing factor to shortages in all geographies except for London/South East and West/South West. Too many experienced people retiring from technical grades was noted as an additional challenge in the North West and Northern Ireland.

"Of the few gaffers here with drama experience, we're seeing them retire and no new people are coming through." - Northern Ireland

"There's a lack of entrants for technical role like sparks and riggers, but also there's a lack of awareness of the roles and the routes among students in any department. It's resulted in a loss of understanding and appetite to build a craft." - Scotland

Coping with shortages

The method of tackling skills shortages in the local workforce appears to be dependent upon the choices of the individual production rather than any influence by nation, region or scripted sub-sector. Most production interviewees described stepping people up early to address the issue, usually accompanied by reliance on more experienced crew members to offer guidance and supervision. This was reported similarly across all nations and regions.

One interviewee had themselves recently experienced an early promotion and was keen to convey the dilemma that it can present for the individual concerned. Having embraced the opportunity and committed to doing it well, they were nonetheless aware of having gaps in their own knowledge and experience, and the potential consequences for the production and industry, as well as their own career:

"I'll now be expected to support two people I've recently hired. While I feel able to do that, I'm very aware that I may be missing things and could pass my lack of understanding on to them." - Yorkshire and North East

Aside from stepping crew members up, other ways of coping included:

- Using other crew members to cover gaps
- Finding different crews for different episodes
- Outsourcing some aspects of production to external services
- Managing without some roles (eg standbys, trainees)
- Having some crew members overlap or work across two productions

- Bringing in crew from another nation or region or overseas
- Hiring people regardless of their suitability for the role
- Taking on a higher number of recent graduates than usual
- Seeking out returning crew (eg after retirement or parental leave) or people with transferable skills
- Offering extra benefits to attract crew to the production
- Changing the crew structure to better fit who was available

From a workforce development perspective, some further insight can be gained from the less popular methods of coping that highlight broadly varying attitudes to working culture and practice, though again no notable geographical influence was apparent. Outsourcing aspects of production such as finance, asking people to work across two projects, looking overseas for crew and trying to attract people back from retirement were among the lesser-tried solutions. Few had offered flexible working, made the working environment or role more attractive, or offered training (via internal or external provision). These approaches were most commonly reported in Wales.

Two children's drama interviewees commented that, to cope with shortages on a relatively low budget, they had changed the crew structure to get the best from the available people, in one instance. This had resulted in a more streamlined and efficient way of working within their available resource from which the interviewee had learned useful lessons. Several productions had taken on more graduates than usual, while one reported having to manage without trainees. Both of these approaches could mean missed opportunities for entrants - the risk of working among a higher number of inexperienced people versus the loss of a chance to gain experience at all.

Attitudes to job transferability

To ascertain whether employing workers from other sectors could help ease shortages, production interviewees were asked whether they had attracted - or would consider hiring - transferable skills from other sectors. Once again, responses showed little variation in attitudes around the UK, with a largely favourable view of attracting career-changers.

Transferring skills from other screen sectors

Nearly all interviewees, regardless of their nation or region or scripted sub-sector, would consider crew from any other scripted production background. For some, that would extend into commercials or music video production. Few would be willing to look to crew from unscripted backgrounds, feeling that the process is too different and would not therefore bring any specific advantage as a solution. However, some interviewees from the Midlands and the North West - both regions with a history of producing unscripted TV - commented that being more open to production office roles transferring into scripted from unscripted, especially entertainment and reality genres, could be a good way to tackle shortages. However, as set out in recent Unscripted TV Skills Fund Council research (ScreenSkills, 2022b), that screen sector is also experiencing crew shortages, particularly in production grades. Several interviewees who had already looked to unscripted TV to fill shortages had done so because of the speed and resourcefulness of crew in that sector, including a higher level of multi-skilling. As one lower-band HETV interviewee explained:

*"We've used people from a light entertainment background - they're used to having no time, no budget and few people, so if they can survive that, they can survive this."
- London and South East*

In some instances, lower budget productions could be looking to the unscripted workforce due to affordability, not just ability and aptitude. One interviewee explained, with crew rates driven up by increased demand in scripted production, shows with smaller budgets struggle to compete and can be pressured into looking elsewhere:

"I know children's productions that have drawn from factual and fact-ent, because they can't afford people from film or higher-end. But the unscripted guys are struggling [to find crew] too, so it's not really a viable solution." - Northern Ireland

However, one interviewee said they would not be willing to consider talent and crew from any other screen sector, including other types of scripted production. They observed that many crew are no longer used to being part of the much smaller teams typically employed on low budget children's shows and are therefore likely to lack the necessary breadth of knowledge, skills and versatility needed.

Transferring skills from other arts or creative sectors

Nearly all production interviewees were open to considering relevant crew from other arts or creative sectors, again regardless of their region or nation. The type of role and department was often indicated as the key factor in successful transferability. Most felt that art and craft roles (including those in costume, hair, make-up, props and art departments) would work best, followed by technical roles such as lighting technicians and riggers, then lastly production roles.

Around a third of the production sample had hired from other arts and creative sectors over the past 12 to 18 months, in nearly all nations and regions. Most commonly, crew had been hired from theatre, driven by the increased availability of workers from that sector due to the extended impact of Covid-19 restrictions on live performance and events. Examples included the above-mentioned departments, as well as taking theatre stage managers into floor and production office roles, and miscellaneous theatre crew into Covid-19 management roles. A few examples of transferability from live events were also noted, mainly in Covid-19 roles, but also junior production office and location support roles. In one case, a costume department took on a worker from the fashion and textiles sector. Overall, these transfers from other arts and creative sectors were appreciated by hirer and worker alike. However, the fashion-to-costume example had not been sustainable as working freelance in scripted production presented too much insecurity for the person transferring. It is also worth noting that, as live performance and events were gradually reopening, some interviewees were concerned about losing these valuable transferers back to their original sector. Several interviewees outside of London also observed that the theatre workforce in their area is small and therefore did not present a solution beyond the short-term, nor did they wish to poach from that sector.

Even where transfers from other arts and creative sectors had been successful, it nonetheless required support to help people apply their skills effectively in scripted production due to differences in working practice, as several interviewees observed:

"Costume people from theatre are very good but do need training in how to do screen work, how to pace the work and understand how productions and sets work." - Wales

"These days, film and theatre/drama schools have less crossover than they used to, so while theatre people are highly-skilled they still often need support to come across, depending on the role." - Northern Ireland

Transferring skills from non-screen/arts/creative sectors

Driven by high demand, most production interviewees in all nations and regions, said they would consider crew from any other sector, ie beyond screen, creative or arts. Of those, around a third said it would depend on the role that the transferer was coming into. A fifth had tried it and agreed that a successful transfer requires role-specific considerations, giving viable examples of accounts and finance roles, but also carpenters transferring from domestic practice, draughtspersons from architecture, and Covid-19 and production office roles from travel, logistics and events (eg wedding planner). However, the level of support required, and potential risks involved, varied according to the role:

"We took on someone who'd been a part-time cashier at the local council. It can work well as roles like accounting have a bit less need for prior experience - they don't need to know how to read a call sheet and can learn on the job quite quickly." - Scotland

"We used domestic chippies. They were very skilled but had limitations due to the environment - the way their craft is used in a residential capacity is different to building sets." - East of England

Of the minority who would not consider this kind of transferability, several reasons were given. Some noted that they may consider it if they were assured that the person had received appropriate industry-specific training before being hired, while others were concerned about the cost and time associated with the level of support that such transferers may need. Fear of bringing people from a stable career into a freelance world was also expressed. Again, no insightful geographical variation or pattern was discernible.

In exploring the above possibilities for skills transfers, two caveats were frequently mentioned: the need for transferers to have passion and commitment for the scripted production sector (including an understanding of the role, environment and hours) and access to credible induction training, covering common aspects such as industry terminology, set etiquette, safe working and freelancing as well as role-specific application of skills:

"It's no good doing it unless we make the time to train people then support them into the environment." - Wales

"People need to know more about how the industry works, to know the differences, the working hours, the language and environments more than the skills." - Yorkshire and North East

Looking forward

In exploring perceived solutions to shortages many interviewees' first response - wherever they were based in the UK - was simply to say, "having many more experienced people now", acknowledging that the growth in production had increased demand and outstripped supply. Putting that aside, responses may be grouped into four themes, as shown in Table 4.

Across the nations and regions, interviewees most commonly expressed the need for more industry-led training to help attain consistent standards among crew as they enter and progress in the industry.

The next most cited solutions related to the development of the local hub, favoured by interviewees from the East of England, North East, North West, Northern Ireland, Scotland and Wales. Responses ranged from targeted development and tracking of local crew, to better connecting local education providers with industry, and incentivising productions to use local crew with an attractive production fund.

Improvements to the work culture - changes to conditions, hiring and retention - and addressing commercial factors such as rising pay rates and commissioning patterns were also cited across nations and regions except by interviewees in the East of England and West/South West. Several interviewees also felt that - while complex to achieve - a concerted effort to undertake planning of production around the UK by industry and screen agencies (ie managing the volume and throughput of productions in particular geographies at any given time) could help to improve the deployment and development of crew.

Table 4: Actions suggested by interviewees to mitigate skills shortages, by theme

Theme 1: More or improved industry-led training, based on common industry standards	
Train more people properly on the job (entry and step-up), ie structured, supervised	<ul style="list-style-type: none"> • All nations and regions
Joined-up, standardised industry approach to training	<ul style="list-style-type: none"> • All nations and regions
Additional investment in training by bigger companies, including SVoDs	<ul style="list-style-type: none"> • All nations and regions
Improve awareness of job roles, what they involve and what the career paths are	<ul style="list-style-type: none"> • All nations and regions
Build better relationships with other creative sectors where skills can be transferred both ways	<ul style="list-style-type: none"> • North West • Northern Ireland
Theme 2: More focus on local screen sector hub development, including education	
Improve relationships between employers and local schools and colleges; target people early and provide local pathways in; encourage take-up of apprenticeships	<ul style="list-style-type: none"> • Wales • Northern Ireland
Develop the local crew base to the level that they can compete for work on inbound productions	<ul style="list-style-type: none"> • East • North West • Northern Ireland
Implement good local crew and production tracking service to help local people know what's coming up	<ul style="list-style-type: none"> • Scotland • West/South West
Secure mid- to long-term production investment to help support the case for developing the local hub	<ul style="list-style-type: none"> • East • West/South West
Have a dedicated production fund to incentivise productions to take on local entrants and crew	<ul style="list-style-type: none"> • East • North East
Theme 3: Better work culture in the sector	
Improve working conditions to help retain people, eg offer flexible working, better hours, shared roles, support wellbeing, nurture people	<ul style="list-style-type: none"> • London/South East • Northern Ireland • Scotland • Wales
Theme 4: Commercial factors	
Address rising pay rates to prevent pricing some scripted production out of the market	<ul style="list-style-type: none"> • London/South East • Midlands • North West • Wales
Better, more joined-up planning and scheduling of production by industry and screen agencies UK-wide	<ul style="list-style-type: none"> • Midlands • Scotland • Yorkshire/North East
Have fewer productions at a time and allow more time to prep and crew up	<ul style="list-style-type: none"> • Midlands • Yorkshire/North East

Equalise pay between production office roles and other departments for retention

- North West

Regarding local screen sector hub development, several interviewees conveyed frustration at external perceptions of their nation's or region's location and industry make-up or capability. For example, one interviewee from the West of England emphasised the need for Bristol to be recognised by sector support bodies as a distinct production hub from Cardiff. They explained that the geographical proximity of the two cities can lead to the idea that Bristol can be "merged with Cardiff", expressing concern that this view could impede the west-based hub's capacity to develop. Greater support for out-of-London hub development, led by increased local commissioning, was also cited by an interviewee in London/South East. They believed that levelling up across the UK would ultimately benefit scripted production, making it easier to find strong crew and facilities to confidently meet demand.

Skills gaps

Summary points

- **Most interviewees, regardless of nation or region, felt skills gaps were evident across all roles and departments, due to the high volume of crew stepping up.**
- **A reliance on experienced crew members to teach others on the job or to cover gaps themselves was reported across the UK.**
- **Gaps are varied and include production, craft and technical skills as well as professional (or 'soft') skills.**
- **No distinct geographical differences were observed, though this could reflect the nature and size of the sample.**
- **Skills gaps related to stepping up too early were reported as presenting an additional challenge as they were often not evident until production was underway with the crew member in the role.**
- **The size and shape of crews required by big budget productions, particularly HETV, has led to a narrowing of some roles - and therefore experience - as crew members focus on one aspect of the job and are less exposed to wider departmental functions.**
- **A shortage of people with Welsh-language skills presents an additional specific challenge for indigenous production in Wales.**
- **A large majority of interviewees, including all nations and regions, felt that more industry ownership of - and investment in - crew development is needed to address gaps. On-the-job training is favoured both for entrants and progression.**

This section explores skills gaps in scripted production, ie skills that need developing within the existing workforce, considering the impact they are having and what could be done to help alleviate them. This aspect of research was undertaken only with the production interviewees, which resulted in a limited sample size. Therefore, findings shown in Table 5 represent combined nationwide responses as the sample is likely to be too small to be broken down by geography.

Gaps identified

When considering whether the existing local workforce is adequately skilled for the work they do, the majority of interviewees, regardless of location or scripted sub-sector, emphasised that there are gaps in every role and department. It was largely felt that this was due to a high volume of crew

stepping up early, and many added that the gaps they identified during the research interview were simply those that were at the forefront of their mind to address at the time.

Individual responses were varied and for reporting have been grouped into key categories; this includes specific production, craft and technical skills as well as professional (or 'soft') skills. While broadly similar to gaps identified in ScreenSkills Assessment 2021 (ScreenSkills, 2021), and to some extent the HETV 2022 workforce report (ScreenSkills, 2022a), this study additionally uncovered more specific art and craft skills, such as cabinet-making, reading drawings, upholstery and department-related research. This could reflect a higher representation of those departments within the sample, but it could also suggest that such gaps are more noticeable as departments get bigger to serve higher budget productions. Another additional skill - or quality - highlighted in this study is loyalty. This is a likely nod to the reported practice of leaving one project for another part-way through, which is becoming commonplace and is explored in further detail in the 2022 HETV workforce report (ScreenSkills, 2022a).

Table 5: Reported skills gaps across the UK

Skills gap category	Examples of gaps
Communication	<ul style="list-style-type: none"> • General communication • Disseminating information clearly • Listening • Negotiating • Tolerance
Management and leadership	<ul style="list-style-type: none"> • Managing people and teams • Dealing with difficult situations • Delegating tasks • Giving constructive feedback • Mental health awareness • Problem solving • Recognising and tackling bullying and harassment
Set etiquette and work-readiness (entrants)	<ul style="list-style-type: none"> • Health and safety • Knowing how to behave on set/in a production office • Overview of all departments and how they interact in the production process • Resilience • Understanding how a set/production office works • Understanding job roles and progression
Budgets and finance (accounts office, budget holders from all depts.)	<ul style="list-style-type: none"> • Budget planning • Forecasting and projecting spend • Managing spend/costs
HR	<ul style="list-style-type: none"> • Giving appraisals • Supporting crew performance and development
Team-working	<ul style="list-style-type: none"> • How to work to a bigger-picture brief • Loyalty and integrity
Art and craft	<ul style="list-style-type: none"> • Ability to read drawings • Basics of art department set-up • Cabinetmaking • Drapery and upholstery skills • Freehand drawing (ie pencil, not CAD) • Research skills (eg period decor) • Understanding continuity needs

Production	<ul style="list-style-type: none"> • Basics of production office set-up • Clearances • Contracts, including cast contracts • Location permissions • Planning ability • Needs of working with children (eg chaperones, tutors, hours) • Pre-production process and planning • Scheduling • Software (eg TeamEngine, SetKeeper, POP)
Welsh language	<ul style="list-style-type: none"> • Fluency for Welsh-language productions

Of the interviewees who were working across two or more scripted sub-sectors, the majority believed that the gaps they identified were present across both or all those sub-sectors. Geographically, this was a fairly consistent view. Just two interviewees overall felt that gaps were more prevalent among HETV crew than any other area of scripted – these responses came from different parts of the UK, one in Northern Ireland and one in Yorkshire/North East.

The lack of Welsh-language skills present an additional specific challenge for indigenous production in Wales, as highlighted in the Screen Work 2020 report (McElroy & Hannah, 2021) and the more recently published Screen Survey Wales 2021 (University of South Wales, 2022). Interviewees in Wales working in lower budget scripted sub-sectors noted that the significant growth in HETV had attracted some Welsh language speaking crew to leave indigenous scripted production for better paid work on these English-language productions:

"Welsh-language crew used to move about all Welsh-language production, including unscripted, but we have lost many of them to English-speaking higher-budget dramas now, leaving a very limited pool of Welsh-speaking crew." - Wales

More than skills gaps

Regardless of their location in the UK, many interviewees felt that the high volume of people stepping up early to meet demand and address shortages had created an abnormally noticeable breadth of skills gaps. It was frequently observed that in such cases gaps were not usually evident until a crew member was already hired and working, making it harder to ascertain the type and extent of support that may be needed to address the gap.

"It means there are too many inexperienced people, and you don't realise where the gaps in their skills or knowledge are until they're a few weeks into the job." - East of England

This experience gap could also be the reason that this study found a lack of consistency in understanding how to set up production offices and art departments - something which was not reported in the ScreenSkills Assessment 2021 (ScreenSkills, 2021). Several interviewees expressed concern that, if not addressed, such an extent of gaps caused by early promotion would affect the quality of the workforce as those people progress – and potentially guide or manage others less experienced than themselves – without being fully equipped to do so. One response from Scotland added that the narrowing of roles seen on bigger budget shows was also fuelling this type of experience-based skills gaps. They explained that in such cases, the gap may not even become apparent until the crew member moves to another type of scripted production, such as low budget film or children’s drama, where crews are smaller and a greater breadth of ability and understanding in the role is needed:

"Larger scale shows sometimes create demand for more segregated jobs, such as a production coordinator who focuses more on accommodation and travel, and less on

other aspects of the role – another coordinator will pick up the other things. So, people don't see the whole picture.” – Scotland

Another change in practice observed as having a similar effect is an increased reliance on dailies work, meaning that crew – particularly new entrants – often lack depth and breadth to their experience. Apprehension was expressed regarding a growing assumption among less experienced crew that credits as dailies will be enough to progress their career with, and they do not realise that they probably have significant skills gaps⁹. As one interviewee in Northern Ireland said:

“They seem to be doing smaller stints on more shows rather than longer stints on one show. They're not getting chance to improve or be exposed to the workings of the environment. Dailies can sometimes limit their opportunity to grow if it's all they do – it can limit them to very specific tasks and it's not their fault.” – Northern Ireland

Many interviewees from lower budget production expanded on these concerns, adding that such practice would exacerbate the already problematic lack of multi-skilled crew who they rely on. While the need for multi-skilling in itself was not noted as a specific skills gap, it was often referred to in tandem with the adverse effects of early stepping up. The increasing polarisation in budgets and related working practice could mean that career paths in scripted sectors become more niche and separate. This is also emphasised in the Screen Survey Wales report (University of South Wales, 2022), which found that lack of technical multiskilling among local crew was an area of serious concern. While some of the roles highlighted in that instance were probably more likely to affect unscripted production (eg shooting producer/director, edit producer) the issue was also described within our Wales-based interview sample, particularly those working in children's drama.

Coping with gaps

On exploring how scripted productions are tackling skills gaps in the local workforce, the two most common responses by far suggest productions are reliant upon more experienced crew members to either teach people on the job (informally and ad hoc) or to cover gaps and fix things themselves. While not new practice, these ways of coping were reported consistently across all nations and regions, and scripted sub-sectors, as having been exacerbated by the growth in production and adding to increased workloads for crew.

Few other approaches to coping with skills gaps were commonly suggested. Examples of approaches mentioned only once or twice were:

- asking retired crew to come back to work (East, Midlands, Wales)
- productions creating senior roles outside of their normal crew structure to support and supervise less experienced crew, eg financial controller or consultant line producer (North West, West/South West)
- crew members working across two projects at once (Scotland)
- using a step-up scheme, eg with NI Screen or ScreenSkills (Northern Ireland)
- directing crew to free online courses that may help bring them up to speed (Yorkshire/North East)

One interviewee in Wales reiterated the challenge of dealing with experience gaps and offered insight into why training courses were not a viable solution when working with unknown and inexperienced crew:

⁹ NB: The Assistant Directors Guild UK (ADG) require [evidence of the number of days](#) worked to qualify for its professional membership.

"Training courses would be great – but it was quite hard for us to realise the problem until we were in it, which is a little too late for a training course." - Wales

Future actions

When considering perceived solutions to closing skills gaps and whether these differed across the UK, proposed actions were varied but fell largely under a single dominant theme. The desire for more industry involvement in training was echoed by interviewees across all nations and regions. A particular need for more on-the-job training - for entrants and those progressing their career - was by far most common among interviewees and featured across the UK. Table 6 sets out how interviewees around the UK saw this manifesting.

Table 6: Actions suggested by interviewees to mitigate skills gaps

Theme: More industry ownership of training	
Training more people "properly" on the job (entry and step-up)	<ul style="list-style-type: none"> • All nations and regions
Joined-up approach to training with productions investing proportionately	<ul style="list-style-type: none"> • London/South East • North West • Northern Ireland • Wales
Common standard to denote crew are ready to step up	<ul style="list-style-type: none"> • London/South East • North West • Northern Ireland • Scotland
Stop early stepping up; invest in and nurture the people, don't focus just on the single production	<ul style="list-style-type: none"> • London/South East • Northern Ireland • Scotland • Wales
Give management training to anyone stepping up (ie any level), including people-management and budget management	<ul style="list-style-type: none"> • North West • Wales • Yorks/North East
Give constructive support and feedback to help freelancers progress, eg when moving to bigger budget shows	<ul style="list-style-type: none"> • London/South East • Northern Ireland
Invest more in pre-entry careers awareness and preparation	<ul style="list-style-type: none"> • North West • West/South West • Yorkshire/North East

Many interviewees used phrases such as "training in the old-fashioned way" and "training like the BBC used to", noting that those entering and progressing would ideally spend longer at each level getting to know the breadth of the role, how it interacts with other roles and departments, and demonstrating their ability in a range of situations before stepping up. Interviewees explained that such an approach would offer greater assurance to the individual and production at the point of hiring or assigning more responsibility, though would require dedicated structured supervision by someone who has time to do so. One interviewee also expanded that to gain full benefit from this type of training, it should not just be reactive to priority needs but should take a longer-term view:

"Schemes often focus on the immediate priority but that doesn't help the industry longer term. For example, we shouldn't stop training art department people just because the top priority is accounting." - North West

To help achieve industry agreement on when someone is deemed ready to step up, several interviewees added that a single, highly visible body to set standards at each level was needed. Others felt that industry should invest more in workforce development, with the higher growth and bigger budget areas taking more ownership. In other words, upskilling should reflect the level of upscaling. This was not simply an investment of budget but of time, as one interviewee explained:

"We need time to nurture people. They need to gain experience, no matter how much education or training they come with." - Wales

The need for greater focus on improving management skills, including people- and cost-management, among HoDs and anyone stepping up was considered by some interviewees as essential for retention. However, caution was expressed around the way in which such training should be delivered, with one interviewee concerned that delivering management skills via a standardised online model could simply result in a "tick box exercise" that would not meaningfully change culture or learned behaviour.

It is worth noting that interviewees in the East of England and the Midlands underpinned their responses with the view that training should be an integrated part of developing a local production hub, connecting investment in skills to work opportunities for local crew.

Training and development

Summary points

- **Most interviewees were unsure whether local training or education providers were in tune with industry needs, reporting little or no engagement with, or awareness of, courses; this was the case regardless of nation or region.**
- **Interviewees in Wales were most likely to believe that local training provision was meeting industry needs, though this was focused on production skills rather than craft or technical courses.**
- **Many believed students need more consistent understanding of roles, progression routes and set etiquette before entering industry, including department-specific insights.**
- **The majority preference in all nations and regions was for training to be delivered on the job, including structured pathways, objective supervision, mentoring and broader exposure to the job role, department and production before progression.**

The research sought to capture attitudes to workforce training and development in the current climate, and to gain insight into levels of engagement with local education and training provision. This aspect of the study was undertaken with only the production sample.

Awareness and use of local training provision

The majority of interviewees were unsure whether local providers were in tune with industry needs and able to deliver the type and standard of training needed to support upskilling, especially for freelancers. This applied regardless of where they were in the UK.

Less than a quarter of interviewees felt that local provision was meeting their needs. Those based in Wales were most likely to have this view, reporting "really good" provision of the type and standard required, although this highlighted high standards in training for production roles rather than craft or technical. However, one interviewee added a caveat that despite having strong local provision, a "less fragmented, more centralised training system in Wales would be useful". A minority in London/South East, Scotland and Yorkshire/North East felt that local provision was "good".

Conversely, an equal number stated that local training did not meet industry need. This included interviewees from all nations and regions except for West/South West. Several gave examples of

job-specific training that they considered to be lacking in their area, which centred mainly on production and craft roles.

One interviewee in the North West was unaware of any local training provision for scripted production, adding that having good industry training embedded within their local hub could help build a stronger production community:

"Location is very important in training - courses can help people build a network, so if they all go to London for training they're not building the local network. It's about being part of the production community." - North West

Several additionally expressed concern that, for crew and productions, training culture had become too focused on the more general mandatory courses required by productions (eg health and safety, Covid-19 safety awareness), and less importance was being placed on role-specific courses. Regardless of their views on local provision, or where they were based, the vast majority of interviewees were unsure as to whether local crew were willing to invest in training at present, with many assuming that time was the biggest barrier to upskilling while industry is so busy. As one interviewee summed up:

"Overall, in the UK there's good training on offer, but it's when people access it that's the issue. - Northern Ireland"

Awareness of local further and higher education

Focusing more on new entrants, views were also garnered on the relevance of local college and university courses to help address industry demand. Again, the majority of interviewees were unsure about the range, type or quality of courses offered, and could not therefore comment on specific provision or give examples to back up their views. This was reflected across all nations and regions. Yet, regardless of interviewees' lack of awareness of local college and university courses, many believed that students need to have more consistent fundamental understanding of roles, departments, career progression routes and set etiquette before entering industry. Desire for a greater level of interaction between education providers and industry to help build bridges into work was also regularly raised. For some, this view extended to school-age students, not just those in further or higher study:

"Locally I'd like to see technical courses or schools more engaged. Younger people need to know about the broader range of jobs, especially like electricians and carpenters. The TV industry has been visible here since Game of Thrones, but people still don't know it's for them or how to get in." - Northern Ireland

Some department-specific insight was also offered to illustrate areas where better alignment with industry practice could help make courses more relevant and improve students' wider departmental understanding as well as future career progression. This included several examples of art department entrants being unable to draw by hand, as needed in industry, having attended courses that focused instead on computer aided design (CAD):

"Courses tend to focus on CAD rather than hand drawing, but hand drawing is really important, along with ability to read a drawing, even if you're not going to be a draughtsperson. For example, an art director needs to read a drawing and understand scale, proportion and so on to do their job properly." - London and South East

Preferred methods of training

Reflecting the desired actions to address skills gaps, interviewees across the UK most commonly expressed a preference for work-based learning to address entry-level and step-up training, reflecting the [preferred actions to mitigate skills gaps](#). There was no significant variation between

nations and regions. Frequently referred to as "proper on-the-job training", this was described as having the following desired features:

- Structured learning pathways
- Objectively supervised by a person who has dedicated responsibility
- Guidance or mentoring in the role by a suitably experienced professional
- Opportunity to see the full breadth of the role and work environment
- Enough time to gain experience in role, eg longer than 10 weeks
- Focused on benefiting the individual, not the production

In Wales, this was exemplified by Sgïl Cymru's shared apprenticeship pilot, CRIW¹⁰, which was created to reflect the flexible nature of freelance work that is typical in film and television. Over a 12-month period, apprentices work across a range of productions and companies, to gain a Level 3 Diploma in Creative and Digital Media which covers media creation, production and craft support, essential skills and employer rights and responsibilities¹¹.

Most felt that the skills being developed should dictate the training delivery method. In other words, practical skills were best delivered within an in-person or simulated working environment, whereas theoretical knowledge could be delivered online. For the latter, opinion was divided as to the benefits of using a live trainer versus pre-recorded or self-guided learning. Aside from interviewees in the Midlands and the North West, accessibility and flexibility to fit around production was considered key to delivering successful training. Examples of this included:

- Online delivery, to help increase participation and save on travel time and cost
- Short-burst modules, to reduce time away from paid work
- Longer timeframes to complete courses, eg give a two-month window in which to complete 10 days of learning, to ease pressure on crew who have tight production deadlines

¹⁰ Sgïl Cymru [CRIW](#) apprenticeship scheme in Wales

¹¹ An apprentice-sharing model specifically supporting screen has been operating in Wales for some time due to wider promotion of such a model by Welsh Government, although recent pilots have rolled out across England following a refresh of flexible apprenticeship delivery by England's Government, including with [Warner Bros. Netflix, ScreenSkills](#)' partnership and the [BBC's West Midlands pilot](#).

Future of screen

Summary points

- Interviewees in all nations and regions expressed optimism for a booming sector in which working culture and practices will evolve for the better.
- HETV will continue to dominate scripted production around the UK for at least the midterm, presenting a dilemma: how to maximise this widespread opportunity to develop out-of-London hubs while ensuring that lower budget production is not priced out of the market.
- The ability to keep up with demand, including development of crew, was seen as a key barrier to overcome for commercial sustainability UK-wide, for individual productions/companies, out-of-London hubs and the scripted sector as a whole.
- Greater investment in the planning, development and promotion of local hubs was wanted by interviewees in the East of England, London/South East, Midlands, North West, Yorkshire/North East, Scotland and Wales.
- A stronger focus on the development of the local crew base was perceived as key to boosting production in Northern Ireland, Scotland, West/South West, Wales and Yorkshire/North East.
- The symbiotic relationship between local studios, crew base and funding incentives was widely acknowledged as key to the development of a sustainable local production hub.

Having explored the current situation relating to crew shortages and skills gaps, interviewees from both samples were asked to look ahead and consider changes that may arise over the coming five years, and whether any barriers exist - particularly locally - that could hinder potential opportunities.

Significant anticipated change

Interviewees in all nations and regions showed optimism for what may lie ahead for scripted production: a booming sector in which working culture and practices will evolve for the better. Most commonly, interviewees around the UK felt that growth in scripted production, particularly HETV, would continue, changing the commercial landscape for at least the midterm. A related shift in commissioning power, with broadcasters becoming "poor relations" to SVoDs, was cited in nearly all regions. The vast majority also expressed caution about the potential lasting impact of the current commercial conditions.

The impact of greater competition, ie higher demand for and costs of crew, facilities, locations and studios, was of significant concern to many interviewees around the UK who feared the loss of medium and small independent productions, ie the boom could simply price them out of the market. Further caution was expressed by interviewees in London/South East, North West, Northern Ireland and Scotland: a risk of over-reliance on commissions and investment from US-based SVoDs could see the industry contract as fast as it expanded if they withdrew from the UK. One interviewee in London/South East also voiced concern that the influence of analytics on SVoDs' commissioning decisions could impact the creative, not just commercial, shape of scripted production in the UK. For some interviewees outside of London/South East, the disruption in the market was viewed as an opportunity. In the East of England and Midlands, it was felt that the ongoing level of demand presented a strong case to develop currently lacking production hubs of scale in their respective regions. In Scotland and Wales, optimism was expressed that the increase in production on the ground was leading to improved confidence in - and recognition of - the nation's capability, particularly in terms of higher-budget drama. In Wales, it was felt that political changes could see more devolved programme-making, with the opportunity to home-grow a strong and sustainable production base that would successfully combine inbound and indigenous production.

More broadly, many interviewees articulated the resulting dilemma that these interrelated points present. On the one hand, an increase in business and employment presents more widespread opportunity for sustainable development of hubs across the UK. On the other, the level of scaling up presents a serious threat to indigenous talent and production, with potential to price independent feature film, children's drama and other low budget production - including the training ground it offers - out of the market. As one interviewee summed up, a sustainable, balanced solution will require a joined-up industry approach:

"I've seen boom and bust in the past and it could happen again. We need to jointly find a better, more equal playing field if it's going to sustain itself and be a real opportunity across the board. The sale of Channel 4 - if it goes ahead - could be terrifying in terms of effect on broadcaster positioning at what's already a difficult time with them being squeezed." - London/South East

Business dilemmas aside, interviewees expressed optimism for an improved work culture within scripted production. Greater diversity within crews was most commonly cited among them. Other positive outcomes were predicted as better working conditions (including hours and pay rates) and awareness of mental health, the eradication of bullying and harassment, and more flexible working opportunities.

Some interviewees noted future changes to working practices - and therefore roles - caused by the disruption in the market and improving technology. Examples included:

- Technical advances in workflow for on-set backdrops, broadcast engineering, camera, edit, VFX and virtual production
- More environmentally sustainable production
- A faster-turnaround, US-style production model, including more showrunners and execs

Perceived barriers to change

The above predictions and related dilemmas were echoed when considering potential barriers to meeting the positive aspects of change. Interviewees' focus was mostly on being able to meet the anticipated commercial pressures while retaining the UK's reputation for quality, reliability and creativity. This was widely expressed across nations and regions on three levels:

- The wider scripted sector's overall ability to meet capacity, including demand for and development of crew
- The ability of out-of-London hubs to maximise the opportunity for longer-term local benefit
- Production companies' individual ability to find a commercially - and environmentally - sustainable business model

Such views were not specific to the interviewees' location, with perceived challenges being seen as industry-wide and equally applicable in any nation or region, but examples of how such barriers could manifest locally were given. While these were largely focused on the ability to meet growing demand outside of London/South East, interviewees in London/South East conversely expressed fears about losing business as production spreads more evenly across the UK. Examples included:

- Insufficient investment in and development of the local hub (East, Midlands, North West, West/South West, North East)
- Not enough local crew and facilities to support inward productions (North West, Wales, West/South West, Yorkshire/North East)
- External perception of local ability limiting growth opportunities (Northern Ireland)
- Lack of reliable industry foresight on future technology, eg virtual production, affecting the case for investment decisions (West/South West)
- Adverse impact of levelling up agenda on local business (London/South East)

It is worth also noting that, while not a barrier to change, several interviewees outside of London further expressed trepidation that the ongoing growth in big budget production across the UK could see hubs in the nations and regions losing their sense of identity. This was expressed both in terms of loss or reduction of indigenous production - and therefore representation of local voices on screen - and loss of the personality that makes a nation or region an attractive and distinct place to live and work. One interviewee articulated the complex challenge of capitalising on growth while also serving the local economy and community:

"We need a solid local hub - it's building but it's hard to keep up with the volume of work. We need it to become locally sustainable and maintain a sense of the region, as well as being nationally or globally attractive." West/South West

Additional challenges linked specifically to gaps in education and training were raised in Northern Ireland, Scotland and Wales, with the latter echoing the need for improved long-term skills planning and investment identified in the recent Screen Survey Wales report (University of South Wales, 2022). While interviewees expressed different concerns, they all related to an overall lack of consistency and connection in crew support and development, from pre-entry to professional experience levels. Particular barriers were perceived as:

- Lack of joined-up investment in crew development and support among productions and companies (Northern Ireland)
- Managing progression expectations of entrants (Scotland)
- Schools and colleges still not consistently connected to industry – engagement is reactive, not long-term (Wales)

One contributor linked this situation to the level of crew burnout currently being experienced. They described how the lack of a bigger picture view by employers has fed an unsustainable situation in which the development and wellbeing of freelancers can easily fall out of view. The busier industry gets, the more obscured the view becomes, as individuals favour paid work over an elective break in which to rest, reflect or train:

"It's a freelance industry - Netflix may think they're looking after people who then move straight on to a BBC drama, and BBC think they're looking after everyone on that drama, but nobody's taking care of the bigger picture, the lack of a break in between, chance to reflect and learn, the accumulative impact on individuals." - Northern Ireland

What could help boost production locally

Being permanently and strategically placed to see the ongoing situation on the ground in their nation or region, agency/body interviewees were additionally asked what single thing they felt could have most positive local impact to boost production.

Greater investment in the planning, development and promotion of local hubs was cited in East of England, London/South East, Midlands, North West, Yorkshire/North East, Scotland and Wales. This most commonly took the form of financial investment. Examples included nation- or region-specific financial incentives such as production funds or an extended tax relief to help attract and/or maintain regular production, which was favoured in the East of England, London/South East, North West¹², and North East¹³. Increased outlay in studio or build spaces was also seen as essential to achieving a more sustainable production hub in the East of England, and was also highlighted in the Midlands and Wales. Investment in effort was seen as key to boosting production

¹² Manchester only; Liverpool has a local production fund.

¹³ North East only; Yorkshire and the Humber has a regional production content fund.

locally in other parts of the UK - interviewees in the North West wanted to see more celebration of regional hubs to raise awareness and profile, while the need for better, more collaborative planning among productions (for more effective use of crew and facilities) was expressed in Scotland.

A stronger focus on the development of the local crew base was perceived as key to boosting production in Northern Ireland, Scotland, West/South West, Wales and Yorkshire/North East. In Wales, a concerted, long-term effort to build the talent pipeline from school age was deemed an essential part of this.

While incentives to encourage production and the need for more local crew garnered the same number of responses, the former was considered as key to achieving the latter. In other words, an increase in volume of production could become a lever through which to develop the local crew base, by requiring the productions that benefit from incentives to hire and train local people. The symbiotic relationship between studios, crew and funding - as highlighted in other reports (Nordicity; Saffreys Champness; ScreenSkills, 2022) (Olsberg SPI, 2022) - was regularly referred to by agency/body interviewees outside London as key to the successful development of a sustainable local hub.

Conclusions

Several of the concluding messages are not new but they reiterate issues already known to industry and corroborate findings in other recent studies (ScreenSkills, 2021; ScreenSkills, 2022a; Olsberg SPI, 2022; University of South Wales, 2022).

Conversations around the UK highlighted the essential symbiotic relationship needed between local infrastructure (eg studios, facilities), development of the crew base (from pre-entry upwards) and funding incentives (eg tax reliefs, production funds, local authority investment, skills support). This triangle is seen as the foundation for development and/or growth of a sustainable local production hub, regardless of how established or nascent it is. To fully realise the potential of scripted production around the UK, striking a balance between stronger hubs in the nations and regions and the industry's inherent peripatetic characteristics, the following considerations need to be addressed locally and nationally:

Freelance crew are facing burnout, with little downtime for training and rest between jobs

The current ways of coping with shortages are not sustainable if industry does not also take up more opportunities to attract, develop and retain crew - at all levels. With a high volume of work opportunities and increasingly attractive rates of pay, continuing professional development (CPD) is not perceived as a priority among crew or productions. High numbers of crew stepping up, combined with the loss of traditional work-based training and progression routes, such as those formerly provided by broadcasters, means that quality and consistency of skills among crews is varied and unpredictable. Entrants are reportedly lacking big picture understanding of job roles, departments, and the wider production process, while crew and HoDs lack the necessary management skills, particularly when moving to higher-budget productions. Crew experiencing the effects of long hours and high demand are being relied upon to support - and/or cover gaps caused by - larger than usual numbers of people inexperienced or unsuitable for the roles they are recruited for.

Increased production in hubs is not yet supporting sustainable local crew development

Despite the potential for regional hubs to benefit from more regular production, and therefore related crew development, the increase in production levels and reported prevalence of early stepping up among crew, does not appear to have translated into opportunities to develop local heads of department (HoDs) or diversify the workforce. Inbound productions are still perceived to be bringing crew into hubs, particularly HoDs, and hiring word-of-mouth, even while facing shortages in production, craft and technical roles. Further frustration is apparent in geographies

where local hubs might not yet be ready to keep up with the required scale and specification to support long-running HETV, including Norfolk in the East of England and Birmingham in the Midlands. This is affecting the ability to build and retain local crew bases and could present a missed opportunity if scripted production does not embrace the chance to help support and develop their regional crews.

Barriers to a career in scripted production remain despite optimism for improving inclusion

Similarly, the boom in scripted production does not yet appear to have had significant positive impact on representation in the workforce, despite high demand for crew. Diversity targets are perceived as hindering as much as helping to address representation, and concern over low awareness of roles and negative perceptions of the working culture is evident. Changing attitudes to recruitment and retention could help productions to unlock a wider pool of crew with wide-ranging backgrounds and life circumstances, including those working in other sectors who could be attracted to a change in career.

The shape of production and roles is changing as the commercial landscape shifts

Lower-budget scripted production - such as independent film, children's drama, and continuing drama - are reportedly hardest hit by the boom and related crew shortages as they struggle to compete with HETV. A polarisation between budget levels is evident which is likely affecting crew roles to a greater extent than previously seen. At the larger scale of production, the scope of some roles is increasingly narrowing as bigger teams mean that individual crew members may only experience one aspect of the job. Meanwhile at the lower budget end, a broadening of roles is apparent, with productions needing well-rounded and, in some cases, multi-skilled crew to cope with smaller crews on tighter costs, and indigenous talent are struggling to get projects off the ground. There is potential for such change to have greater impact on regional hubs that have to date relied on an established lower budget, independent sector. This is perhaps the most challenging bigger-picture dilemma. Commercially, balance is needed to ensure the mid- to long-term sustainability of the UK's varied scripted production sector and range of creative voices. From a workforce perspective, if polarisation persists, crew in all departments could face choosing a more specific career path at an earlier stage and require greater CPD if/when they choose to move to a different type of scripted production.

Some are cautiously poised for technological changes, but no big shift appears imminent

There appears to be little sign of a significant impact from technology such as virtual production in most scripted sub-sectors. For now, it is in the realm of the larger budget productions that can consider its value and impact on their creative choices. However, more affordable changes in backdrop technology appear to be gaining some traction, perhaps indicative of a more gradual shift to such technology on set. As regional production hubs and studios such as Bristol and Manchester consider the best ways to invest in flexible facilities and infrastructure for the future, this remains a clear but cautiously approached opportunity.

Strategic mid- to long-term action is needed to address crew shortages and skill gaps

Around the UK, interviewees widely acknowledged that the unprecedented volume of scripted production has exacerbated crew shortages and recognised that this cannot be solved overnight. The shift in the production landscape, with more production being pushed out to the nations and regions, needs mid- to long-term solutions to help achieve crew sustainability in hubs across UK. Appetite for a joined-up national response, backed by greater industry investment and focused on hub-based development is apparent. Linking schools, colleges and universities into the talent pipeline is deemed key for the long-term, with little appetite around the UK for short-term or reactive solutions despite urgent need.

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Appendix 1: Combined shortages reported across the UK

Shortage roles in scripted production observed by interviewees across the UK. The total number of mentions is given in brackets.

Production manager (24)	Gaffer (2)
Production accountant (21)	Graphic designer (2)
Production coordinator (20)	Hair and make-up designer (2)
Line producer (15)	Prop hand (2)
Location manager (14)	Prop master (2)
1st assistant director (12)	Standby prop (2)
2nd assistant director (10)	Unit manager (2)
Production secretary (10)	Location scout (2)
Art director (8)	2nd assistant camera (1)
Grip (8)	Animator (1)
Script supervisor (8)	Assistant art director (1)
Location assistant (6)	Assistant production coordinator (1)
3rd assistant director (5)	Colourist (1)
Cashier (5)	Construction manager (1)
Standby art director (5)	Costume daily (1)
Costume maker (4)	Crowd supervisor (1)
Covid-19 supervisor (4)	Director (1)
Editor (4)	Director of photography (1)
Focus puller (4)	Draughtsperson (1)
Lighting technician (4)	Executive producer (1)
Producer (4)	Freehand artist (1)
Set decorator (4)	Historical researcher (1)
Art dept. assistant (3)	Intimacy coordinator (1)
Assistant production accountant (3)	Make-up designer (1)
Costume designer (3)	MCR operator (post) (1)
Covid-19 assistant (3)	Medic (1)
Covid-19 manager (3)	Plasterer (1)
Hair & make-up artist (3)	Production designer (1)
Production assistant (3)	Production runner (1)
Camera assistant (3)	Prop daily (1)
Assistant costume designer (2)	Rigger (1)
Carpenter (2)	Scenic painter (1)
DIT (2)	Supervising art director (1)

