Non-Scripted Skills Research
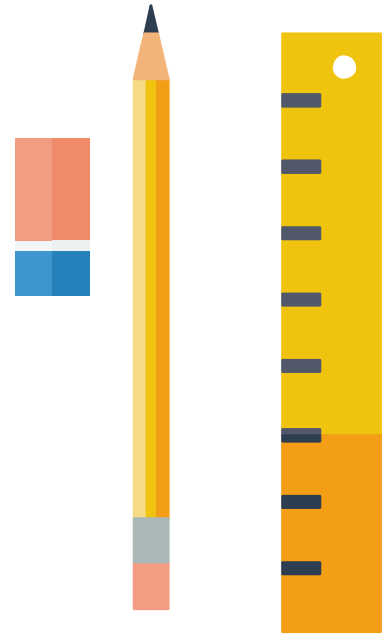
Report of key findings

24th July 2018

Objectives

- To understand the current issues within non-scripted* TV production as they relate to genre, regions, skill types, roles and grades.

- To identify the key drivers of skills gaps and shortages and how they relate to one another.

- To explore how skills-related problems are perceived to change over the next 5 years.

- To understand how skills-related issues relate to a lack of diversity and inclusion within the non-scripted area.
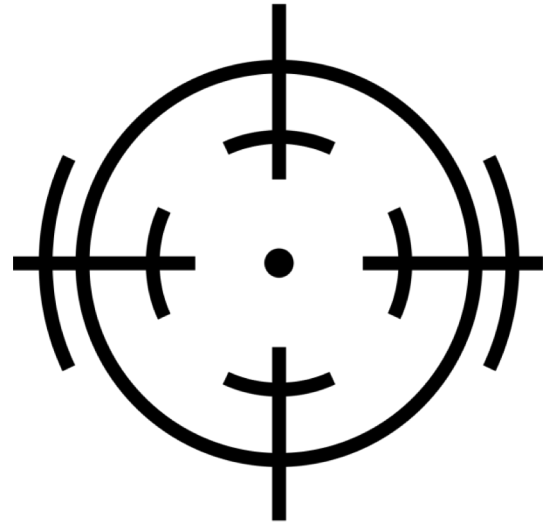
The genres defined as 'non-scripted' within this research include traditional non-scripted genres as well as continuing drama, non high-end drama and comedy, in other words all genres which are not presently covered by a skills levy.

Method

- Qualitative depth interviews conducted with talent execs, head of production and CEOs of a range of independent production companies and UK Broadcasters working in non-scripted genres.

  – 20-30 minute interviews with 10 participants.

- Quantitative survey of a wider pool of TV talent and production executives within the non-scripted area.

  – Sample size of 26 (response rate of 53%).

- Fieldwork took place in June 2018.

- Total sample size (n=36) should be seen relative and proportional to the size of the research 'universe' – in this case the non-scripted TV workforce.
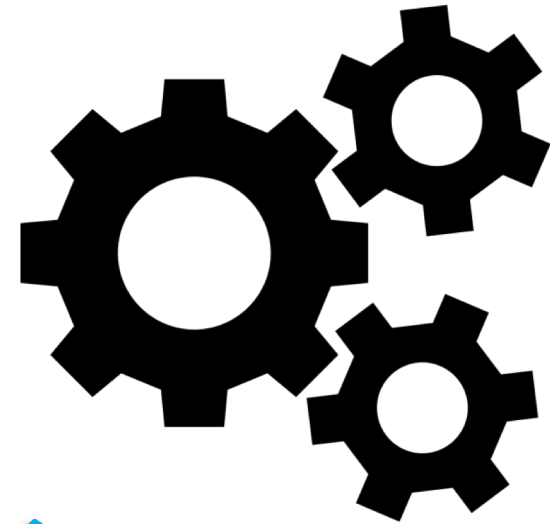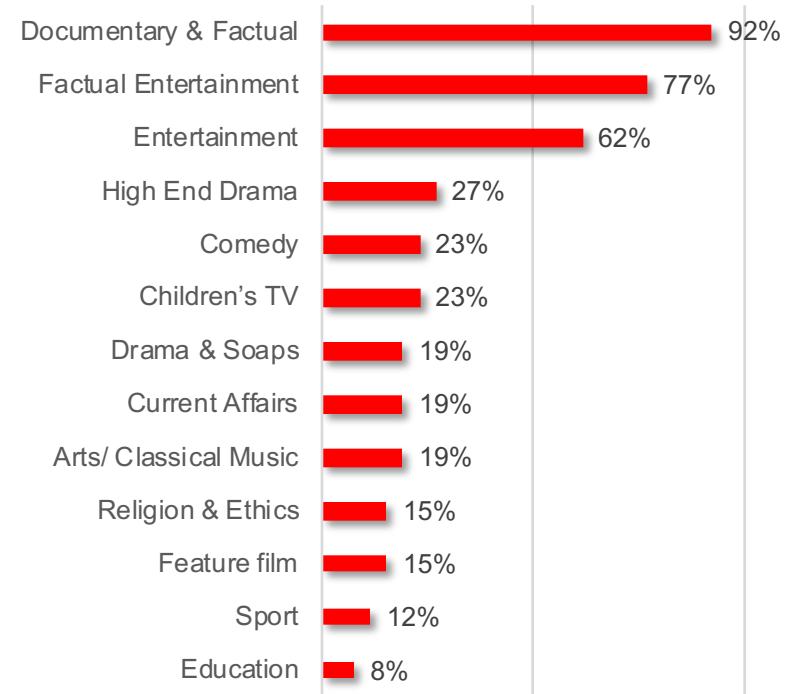
Throughout the report, verbatim comments from the interviews and survey are used to reinforce points made

Sample structure

Roughly how many employees does the [production] company have?

Employees	Percentage
1000+	8%
250-1000	12%
101-249	42%
10-100	31%
1-9	8%
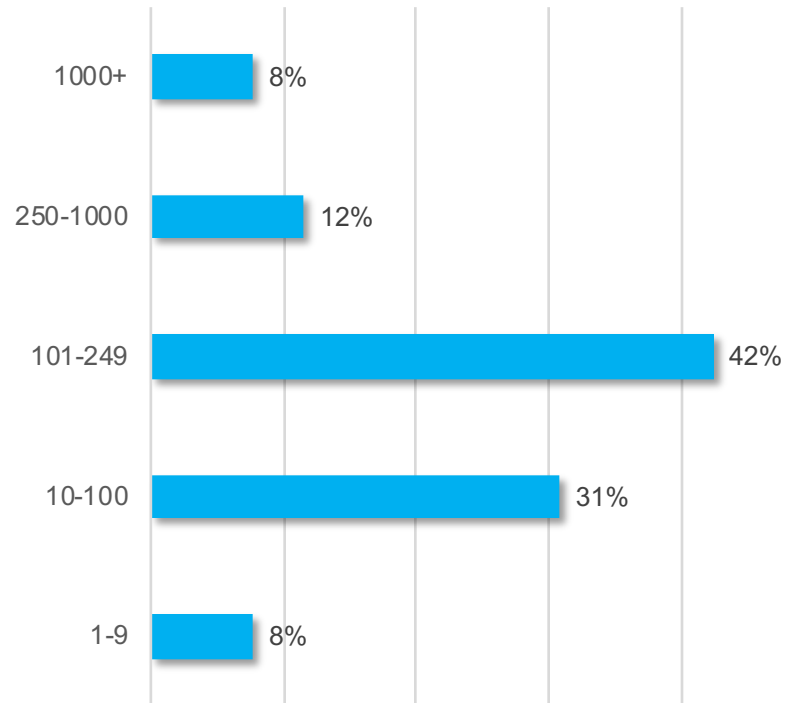
Which genres does the [production] company work in?
For reference, please include productions from the last 5 years

Genre	Percentage
Documentary & Factual	92%
Factual Entertainment	77%
Entertainment	62%
High End Drama	27%
Comedy	23%
Children's TV	23%
Drama & Soaps	19%
Current Affairs	19%
Arts/ Classical Music	19%
Religion & Ethics	15%
Feature film	15%
Sport	12%
Education	8%

Sample of respondents by genre

Which genres does the company work in?

■ Genre worked in
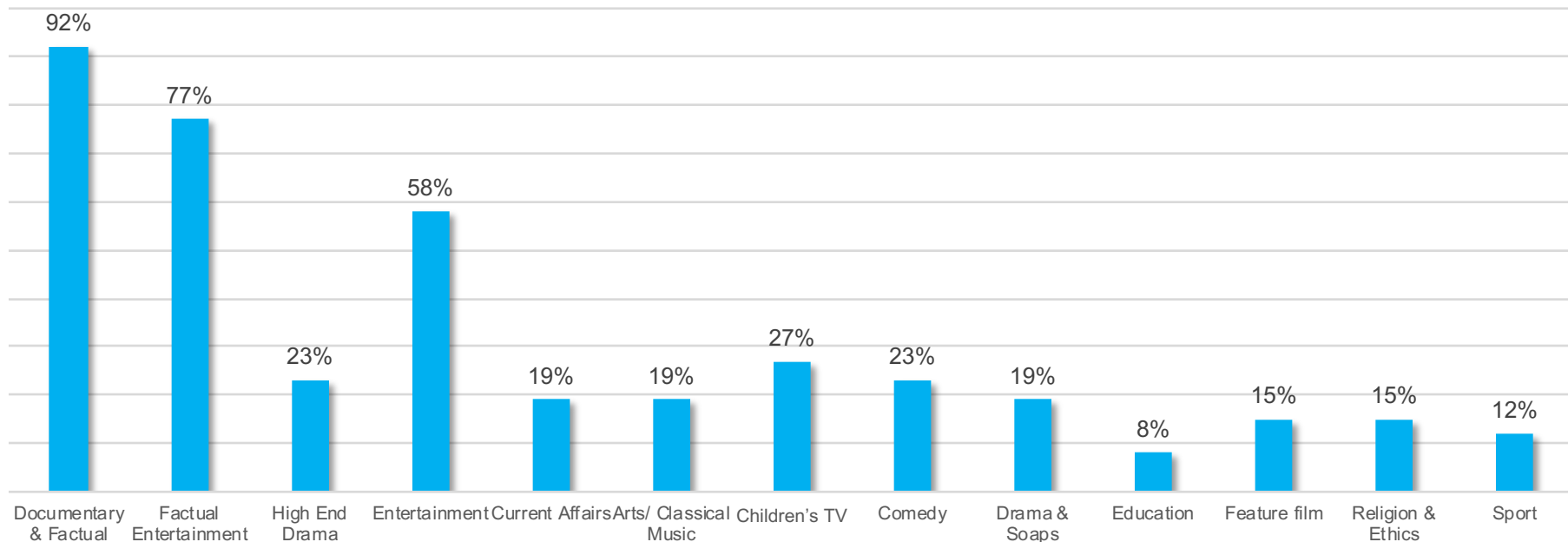
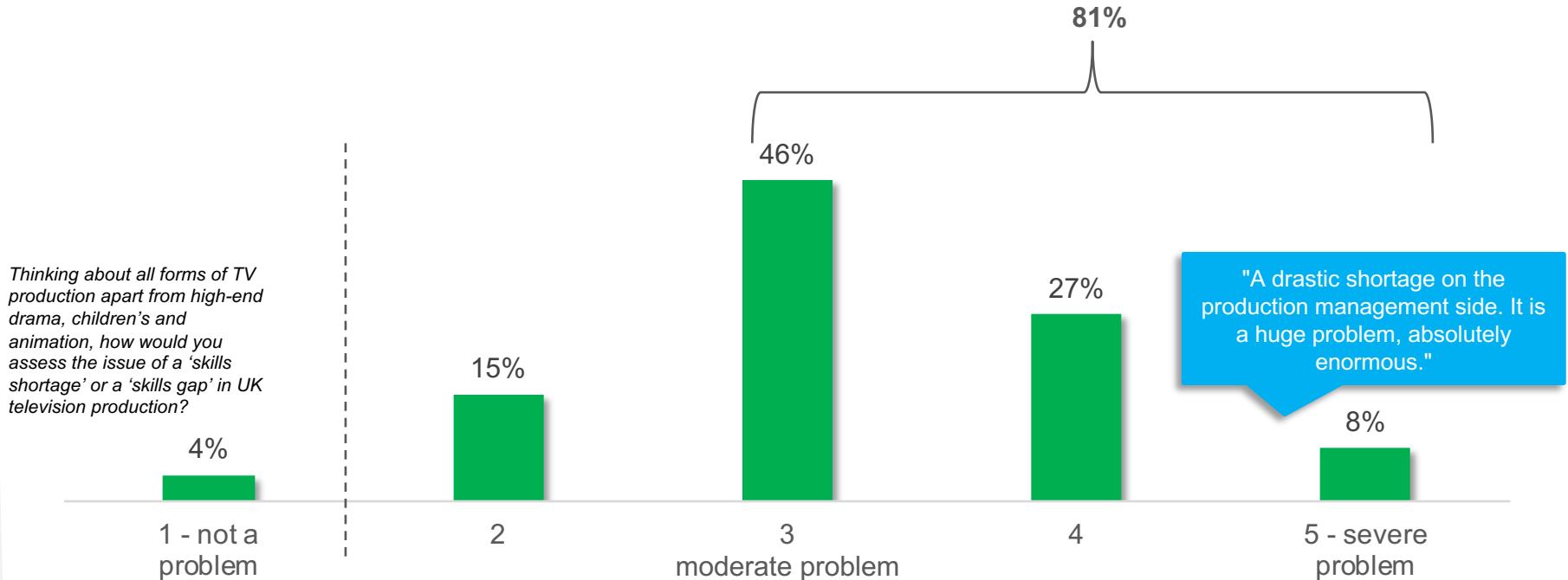| Genre	%
Documentary & Factual	92%
Factual Entertainment	77%
High End Drama	23%
Entertainment	58%
Current Affairs	19%
Arts/ Classical Music	19%
Children's TV	27%
Comedy	23%
Drama & Soaps	19%
Education	8%
Feature film	15%
Religion & Ethics	15%
Sport	12%

Base: Senior managers/execs across non-scripted genres (n=26)
Source: Creative Skillset non-scripted skills research

The skills issue

There is a skills shortage/gap in non-scripted TV

- Data collected in the survey points to a 'moderate to serious' skills issue for non-scripted TV, with over 80% scoring it as 3 or more out of 5 and over a third scoring it as a 4 or 5 rated issue.

Thinking about all forms of TV production apart from high-end drama, children's and animation, how would you assess the issue of a 'skills shortage' or a 'skills gap' in UK television production?

81%

46%

27%

"A drastic shortage on the production management side. It is a huge problem, absolutely enormous."

15%

8%

4%

| 1 - not a problem | 2 | 3 moderate problem | 4 | 5 - severe problem |

Shortages by role

- Across the quantitative and qualitative research phases, research participants were asked for the specific roles which they felt were hard to recruit.

- There appears to be an immediate need for SPs and PDs and also a focus on APs, researchers and production management staff.

10+ mentions
- Series Producer
- Producer/Director (incl. self-shooting)

5-10 mentions
- Production Coordinator
- Assistant Producer (incl. self-shooting)
- Researcher
- Production Manager

3-4 mentions
- Producer
- Edit Producer
- Production Secretary
- Production Management staff

2 mentions
- Self shooter
- Editor
- Production Accountant

1 mention
- Script Writer
- Exec
- Casting roles
- Development Producer
- Director
- Loggers

Base: Senior managers/execs across non-scripted genres (n=26) + qualitative consultations (n=10)
Source: Creative Skillset non-scripted skills research

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Skills issue by region

- The survey data also suggests some particular regions where skills shortages and gaps are most obvious. To some extent, this reflects the regions and genres in which companies operate although comparatively there appears to be more of an issue in the NW, Scotland, Wales, the NE and Northern Ireland.

- One survey participant suggested that rather than expect all nations and regions to have a good supply of skills for all types of production, that centres of excellence could be established and emphasised in order to maintain a strong supply of skilled and experienced workforce.

In which nations/ regions of the UK does the company produce TV?
Which UK nations and regions do you feel are most affected by a shortage/gap in skills?
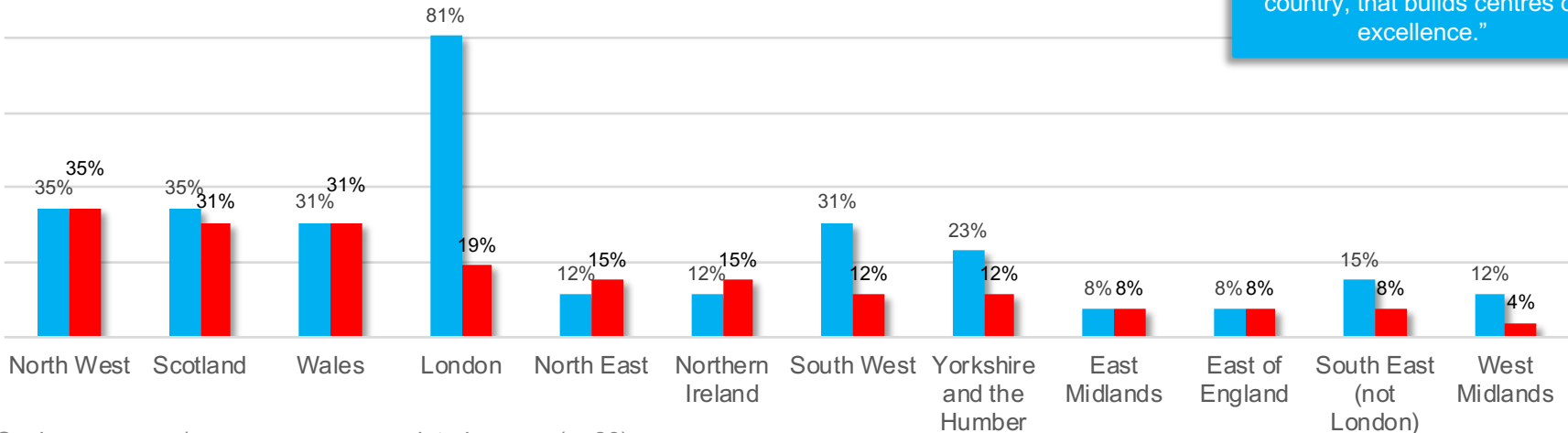
"I don't believe that every area should try and be best in class in every type of production. I think its much better to create a supply strategy that acknowledges strengths (and weaknesses) across the country, that builds centres of excellence."

Legend: ■ Region worked in ■ Regional shortage

Region	Region worked in	Regional shortage
North West	35%	35%
Scotland	35%	31%
Wales	31%	31%
London	81%	19%
North East	12%	15%
Northern Ireland	12%	15%
South West	31%	12%
Yorkshire and the Humber	23%	12%
East Midlands	8%	8%
East of England	8%	8%
South East (not London)	15%	8%
West Midlands	12%	4%

Base: Senior managers/execs across non-scripted genres (n=26)
Source: Creative Skillset non-scripted skills research

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Shortages by technical skill

- In addition to specific roles which were felt to be in shortage, a number of technical and production-related skills were highlighted.

[OPEN-ENDED QUESTION] Thinking now about skills in the TV production industry - such as technical skills, soft skills or general business skills, what do you think is really lacking? Please list all the specific skills you think are lacking at the moment.

Camera skills, sound, shooting and self-shooting	Editing skills, edit-producing, telling a story through the edit	Casting skills
Sequencing – what makes a good sequence and how to put it together	Script-writing and editing	Multi-skilling – ability for individuals to cast, shoot, edit, write etc

There is also a call for more non-technical skills

- Almost unanimously from the consultation interviews, a series of non-technical and soft skills were seen to be a lacking within the industry. The survey sample concurred with a number of areas which are summarised below.

- The types of skills which were seen as lacking varied widely – a number of people centred on the lack of professionalism within the TV production industry in relation to areas such as leadership, communication and people management.

- The introduction of conscious and unconscious bias due to a lack of consideration of recruiting skills was mentioned during the interviews as a genuine issue and driver of a lack of diversity in the production workforce.

[OPEN-ENDED QUESTION] Thinking now about skills in the TV production industry - such as technical skills, soft skills or general business skills, what do you think is really lacking? Please list all the specific skills you think are lacking at the moment.

""*We're terrible at that! [soft skills]. As an industry, no one has any of that, it's a real area of weakness*"

Journalism, research, writing, editorial	Communication, telephone skills	Leadership, people management
Compliance and legal	Finance, budgeting	Recruitment, interviewing

"When you move from being an AP to a PD and an SP there is an expectation you'll know how to manage people but this is what's missing sometimes"

Base: Senior managers/execs across non-scripted genres (n=26) + qualitative consultations (n=10)
Source: Creative Skillset non-scripted skills research

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What can be observed is a bottleneck – mid to high level grades are seen as the main problem area

- Data from the survey shows a clear disparity in skills shortages and gaps for those in mid-level and senior grades over new entrants, trainees and junior level grades.

Which grades/ levels of seniority do you feel are most affected by a skills shortage/gap?

"It's a problem the minute you want to start finding directors, showrunners and exec producers."

65%

46%

23%

8%

27%

| New entrants | Trainees | Junior grades | Mid-level grades | Senior grades |
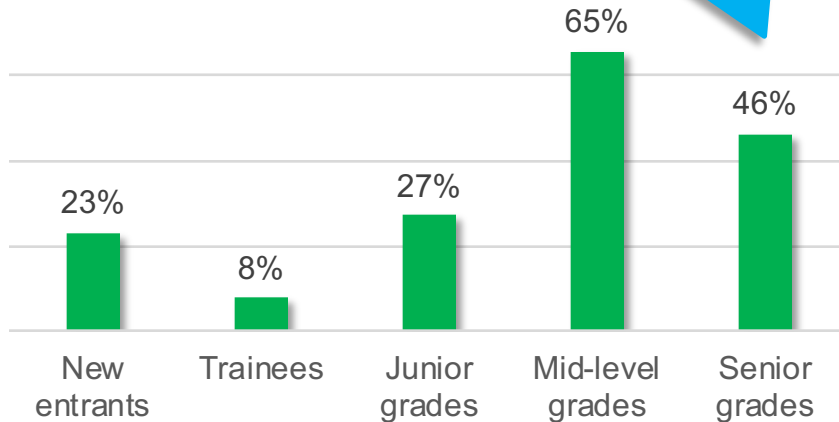
Via the qual interviews, this data can be explained in simple terms as senior grades appearing to be lacking *availability,* with junior grades lacking *skills and experience...*

- From the qualitative research, the general consensus was that senior grades were much harder to find.

- For junior grades the problem was most likely to be expressed as a lack of the skills and experience expected of their roles.
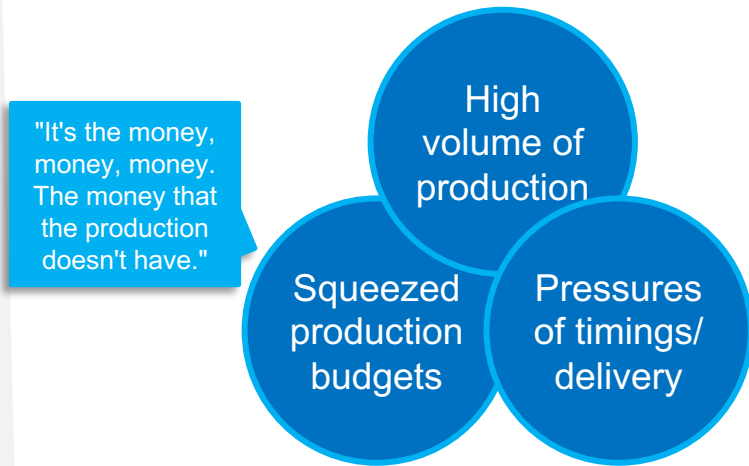
Base: Senior managers/execs across non-scripted genres (n=26) + qualitative consultations (n=10)
Source: Creative Skillset non-scripted skills research

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Drivers of skills-related issues

Key drivers of issues related to skills

- Via a combination of interviews and survey responses, a clear picture of the drivers of skills issues emerges – both for the lack in availability and also the lack of skills and experience.

- These fall into two clear areas: i) external drivers relating to commissioning and budgets and ii) drivers linked to skills.

External drivers related to commissioning and budgets...

Drivers linked to skills...

High volume of production

Squeezed production budgets

Pressures of timings/ delivery

"It's the money, money, money. The money that the production doesn't have."

Lack of formal and on-the-job training

Not enough opportunities to step up

Not enough risk-taking in regards to hiring/ crewing up

Lack of formal and on-the-job training

- A long-term lack of investment in training is one reason given for the lack of skills and experience, notably among more junior grades.

- Terrestrial broadcasters have traditionally provided a professional, consistent and available workforce.

- Reduced budgets for training are felt to affect a number of areas of production, including natural history and high-end factual.

- Training can be divided into the following areas...

"There is a massive lack of investment and funding which needs to be addressed and those training need to ensure they speak to the right people in the regions rather than make assumptions."

Standardisation of skills in TV production

New entrants

Base: Senior managers/execs across non-scripted genres (n=26) + qualitative consultations (n=10)
Source: Creative Skillset non-scripted skills research

Standardisation of skills in TV production

- It is noted that a paradox exists between the 'world class' reputation of UK production skills whilst being an industry with no formal, standardised way of judging skill and experience level.

- Combined with a lack of investment, the shift towards a freelance workforce has presented a challenge for production companies to build and develop their skills and knowledge base and can often prevent access to training for individuals.

- A lack of correct training – or incorrect on-the-job training - creates some uncertainty over 'who knows what', a lack of standardised knowledge which can create problems around specific tasks such as music clearances.

- A lack of understanding of the business of production – of what is expected from departments, of how the broadcasters' business works – can be an issue particularly for production management staff who are seen as the linchpin of the production and are those who can very much help create a successful outcome.

- Individual companies are providing staff with training – through masterclasses, mentoring schemes, on-the-job and formal routes. However, it is admitted that this is not enough to affect the industry as a whole.

- Some call for a more standardised way of judging potential crew rather than simply basing their perception of value on accumulated credits.

"Would like to be able to nurture and grow / train up young talent by monitoring moving them around companies / within the same company - this is very difficult within such a freelance industry."

"Because of the freelance nature of TV, companies don't invest in training short-term staff."

"Training needs to be standardised in some way, so that we can be confident that 'trained' people are qualified to do the job."

Issues relating to new entrants

- A number of research interviewees commented on the expectations of new entrants to the industry, particularly those coming from media courses who tended to see themselves as directors, producers etc as opposed to accepting the need to start at the bottom and work their way up.

"I think colleges should give a better idea of the realities of being a runner. You are not a "film-maker" the moment you leave college. There should be more chances to get into the edit and possibly shadow edit - which could be budgeted for."

"Graduates from media studies courses don't generally have a good overall understanding of how TV is made and the roles within a production. I'm often surprised to receive CVs from them with titles such as editor and director at the top rather than logger and runner."

- Attracting quality candidates to TV production was also mentioned – both in the sense of competing with newer, 'sexier' industries as well as bringing in those who have developed sound research and writing skills, often found within courses and degrees related to an academic subject as opposed to those focused on media studies/ production or more generalist subjects.

"TV doesn't have the same sexy image as online does. We need to appeal to young people through programming and by explaining what the opportunities are."

Not enough opportunities to step up

- What appears to be creating the bottleneck in the availability of crew at mid and senior level roles is a lack of opportunities for people to step up or step across.

- Existing schemes such as the Creative Skillset *Series Producer Programme* are praised but it is felt that more is needed to solve this problem among other roles.

- Linked very much to the lack of risk-taking witnessed among broadcasters and content commissioners, senior staff with a good reputation for delivering certain types of work are much more likely to receive offers for the same type of work again and again.

- One interviewee suggested that these people – who are 'recycled' again and again – are also those lacking in diversity.

- Crew who do get a break are perceived to be given a chance more by luck as opposed to effort, experience and recognition.

- Some of the interviewees suggested the lack of opportunity to move into a more senior role was a key reason for people to drop out of TV production all together, notably at AP and producer level. It was also felt that women taking time to have a family found it very difficult to get back into production with a lack of opportunity for job-sharing.

- The relatively quick promotion for junior crew compounds this issue. It is highlighted that too often junior crew are able to step up too quickly and without the necessary level of experience.

> "We're going to struggle to find the next generation of directors that we can employ that have acquired those skills."

> "For specialist genres, both junior and senior talent (eg asst prod and series prod level) are always looking to develop within their field, but do not always have the support structure and training experience to do so from external resources."

> "I think there should be more courses with mentorships available to mid and higher level staff. The Series Producer programme is brilliant and we need more of those for other roles within the industry."

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Not enough risk-taking in regards to hiring/ crewing up

- A lack of permitted risk-taking – largely seen to be instigated by broadcasters and networks was a common theme from the research, both qualitatively and quantitatively.

- This typically plays out as the broadcaster/commissioner requiring a known name or top talent to be attached to the production, most often in a senior role. In many cases, the commissioner has ultimate sign-off on senior level roles and the situation with US buyers is said to be even more stringent.

- A lack of risk-taking can also be driven by the production whereby the same crew are used continually – creating a 'short-hand' as a way of tackling the lack of time allowed to recruit and the continual squeeze on production budgets.

- The general lack of risk-taking is largely *understood* by the production community who are able to empathise with the position the Broadcaster is in; ie. that to create the 'best' programme you need the 'best' people.

- However, the perception of the 'best' people often means sourcing talent from a very small pool meaning fresh, high quality, often more diverse talent is harder to put in place.

- Some have found compromises, where they can find budget for job-shadowing in order to mitigate any risk, or where they can persuade commissioners to take a risk on someone new for a single episode in a series run.

"We have to go through enormously complex sign off procedures with everybody we employ as Directors, Showrunners and Exec Producers so it's not a place where you can try out new talent particularly."

"Unless you give them a Hollywood name they [FAANG] think you can't deliver".
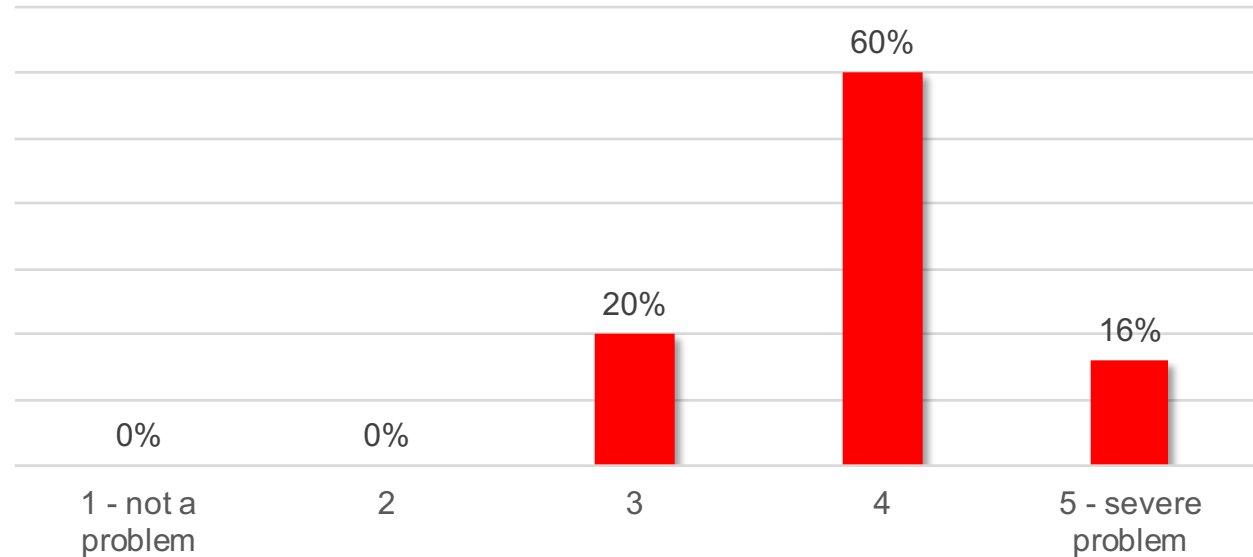
Diversity and skills

Many companies are putting diversity measures in place in recognition of its importance and the commercial benefits

- From the in-depth interviews, there was very little resistance to the idea of creating a more diverse workforce in TV production. Many recognised the obvious commercial benefits, which included creating content better suited for <u>all</u> audiences.

- As well as the targets required by broadcasters it seems there is a lot of activity within individual companies to tackle the lack of diversity and inclusion. Even so, there was a general feeling that things hadn't really improved, particularly at a senior level. It was felt that a more concerted, centralised effort is required.

- From the interviews conducted there were very few examples of indies carrying out their own formal monitoring. However, a number of companies worked with Project Diamond. Some argued that the Project Diamond data should be shared back with industry.

- Examples of initiatives are:

  – ITV's Commissioning Commitment which places an onus on producers to improve diversity and inclusion on and off-screen.

  – Making a commitment to take one risk on every project – to identify a talented person and give them an opportunity.

  – Training staff to counter unconscious bias within recruitment and consider inclusivity to help reduce the recruitment of 'people who look like me'.

  – Paying into schemes or working with organisations such as: Mama Youth, Think Bigger, PACT (Indie Diversity Training Scheme), ITF, universities, Creative Access, Sharp Futures.

  – Funding work placements.

  – Outreach work at schools, colleges and universities

  – More generally, developing and keeping a close eye over potential individuals who might be senior talent in the future.

A lack of diversity is a significant problem

- The perception of diversity as an issue is highlighted below, with over three-quarters of those surveyed considering it a particular problem (4 or 5 out of 5).

At the moment, how would you assess the issue of diversity in UK television production? In your answer, please consider of all aspects of diversity such as ethnicity, gender, region, social mobility.

Bar chart:
- 1 - not a problem: 0%
- 2: 0%
- 3: 20%
- 4: 60%
- 5 - severe problem: 16%

Lack of diversity relates to skills on two broad levels

Diversity in the 'here and now'

- Day-to-day, diversity targets and pressures to find diverse crew are made harder to achieve by a lack of availability.

- Diversity appears to be much harder to achieve at more senior levels and easier to tackle at entrant and junior levels.

- Whilst some suggest that it is a matter of time until the diverse junior crew make it into senior grades, others suggest there's a bigger drop off of diverse workforce at junior and mid-level grades and that time has not seen much positive effect at a senior level.

- Lack of budget and shortened delivery times are among the immediate and pressing factors which can 'force' a quick decision over crew which can mean recycling the same names.

- Using a known face, often from a less diverse background, is a short-hand to tackle the pressures of production work.

Diversity in the longer-term

- As stated, there was little resistance among interviewees to improving diversity given the obvious commercial benefits.

- However it is perceived that the push for on-screen diversity has not been matched by the push for off-screen representation.

- Thinking strategically and digging deeper it appears that tackling diversity will in turn help to solve the skills gap – that the two issues go 'hand in hand' and if you fix one, you'll fix the other.

- A lack of risk-taking, a lack of opportunities to step up and a perceived small talent pool are factors which affect skills shortages and diversity alike.

- Barriers to diversity and inclusivity can come from seemingly more trivial problems – one example given is that runners will often need a driving licence in order to work which can prevent those who can't afford to learn to drive from considering a role in TV.

"I've been saying that [time will solve diversity issues] for the last 20 years, I'm embarrassed to say it again."

"On-screen there's absolute support and the people at the top will really push but off-screen there isn't the same level of pushing... and actually the real power is who's making the programme behind the scenes."

Lack of diversity and workforce availability largely comes down to the size of the talent pool considered

"The pool is very, very small."

- Industry's focus on commissioning, creating and delivering 'the best' translates to considering only 'the best' talent.

- Whilst there is very little control over how 'successful' a show will be in terms of viewership, controlling what can be controlled – ie using the best talent – drives the lack of risk and reduces the size of the talent pool which is considered.

- Pressure on production crew who often have very little time to recruit is another reason for considering only the small pool – sourcing someone you've worked with before is short-hand and saves time.

- A number of people acknowledge a definite level of bias in crewing up – likely to lead to the selection of 'people who look like me'
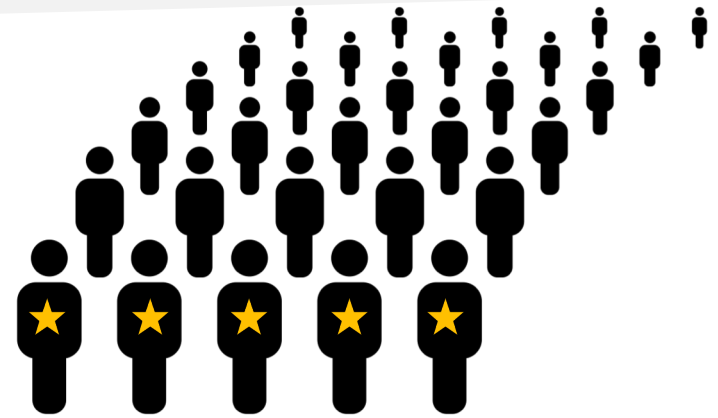
- Others suggest there is a wider talent pool, one which is in need of work, in need of opportunities to step up and one which is much more diverse but one which has more risk associated with it.

- This raises the question of 'what defines good?'. 'Value' appears to be all to often judged by production credits.

- This clearly relates to the lack of standardisation of training within the UK television industry and so potentially a lack of fairness over the way crew are judged and valued.

"One of the big challenges is that I don't think we judge objectively as an industry what 'good' is... I think there are too few people who are perceived to be 'good' enough to be hired and I think that's having a real impact on the skills shortage."

The talent pool debate... in their own words

We're really trying but it's very hard to find people...

We're not looking widely enough...

"I think in general I would say it's harder to get a very diverse production team together on a super premium, factual series - the talent isn't out there and I don't know why that is."

"We want to make real change, we get it. But we struggle to even find applicants from diverse backgrounds who either have the necessary skills or who are even interested in working in TV. We hire to fill specific roles and we often have to move quickly so we don't have the time or skills to create a diverse workforce and we simply don't get many applicants from diverse backgrounds."

?

"How we hire and who we hire is far too narrow and far too subjective."

"I think the processes that we apply through our lack of professionalism as an industry when it comes to recruitment - the informality of it - leads to an unconscious bias, wanting to hire people you feel comfortable with and therefore they're more likely to be like you."

"In terms of a skills shortage, my view is that if people weren't so restrictive of who they thought could do things, the skills shortage wouldn't feel so severe."
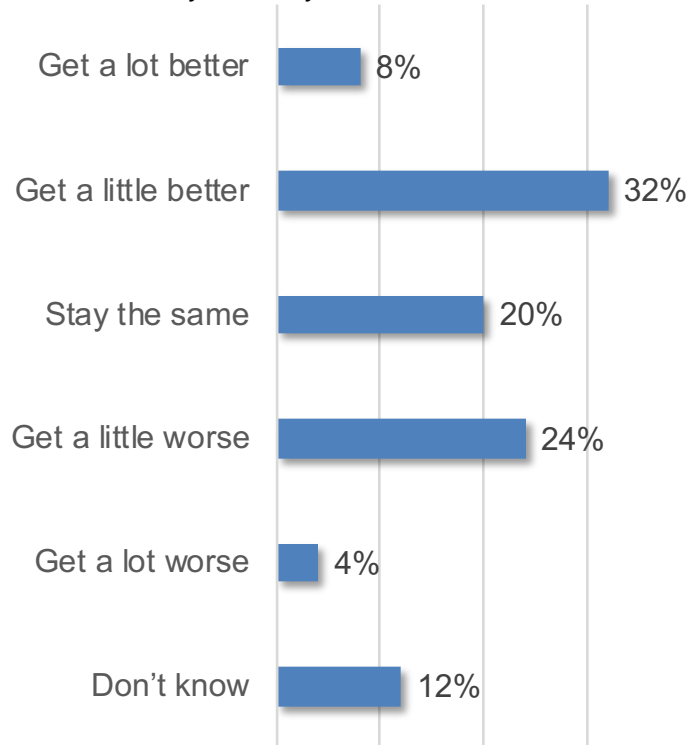
"The industry really believes there's a skills shortage... my view is that when everybody in the industry is regularly working who's good enough, I would have more sympathy for that point of view."

Future skills needs

Future skills needs are hard to articulate and industry is split over whether the situation will improve or get worse

In the next 5 years, do you think the skills issue will...

Response	Percentage
Get a lot better	8%
Get a little better	32%
Stay the same	20%
Get a little worse	24%
Get a lot worse	4%
Don't know	12%

- Survey participants were somewhat split over whether they thought the skills issue would improve, stay the same or get worse over the next five years.

- In the interviews, a number of participants felt it difficult to articulate their feelings on the future issues relating to skills, perhaps because of the nature of TV production being very much in the 'here an d now'.

- For others, their consideration of what might come in the next few years was more about raising questions such as...

  - Will networks recognise they need to take more risk?

  - Will we, as independent companies, have to spend money on more formal training even though we can't necessarily afford it?

Base: Senior managers/execs across non-scripted genres (n=26)
Source: Creative Skillset non-scripted skills research

Feelings around the next 5 years boil down to

[OPEN-ENDED QUESTION] What changes in the TV industry over the next 5 years do you think might make the skills problem worse/ better?

Strengths	Increasing levels of diversity	Crew becoming more multi-skilled	Crew crossing over to other genres
Opportunities?	Consolidation of indie sector	Online/OTT brands and new entrants	Adapting to changes in technology
Threats	Reduction in the quality of output	Salary inflation	Workforce drop-out

"A drama eye on a car series these days is a great opportunity - different points of view, different visions and different skillsets. It really opens up all the possibilities."

"We went from SD to HD, HD to 3D, 3D to UHD and UHD to HDR. It's about people absolutely arming themselves and being really adaptable."

Base: Senior managers/execs across non-scripted genres (n=26) + qualitative consultations (n=10)
Source: Creative Skillset non-scripted skills research

Summary

Research highlights that 81% of participants recognise a skills shortage/ gap within non-scripted TV production.

- There is clear evidence of a skills shortage/ gap from those who work within the array of non-scripted TV genres, with over 4 in 5 citing it as a moderate to severe problem.

- Through further questioning and analysis, it is clear that the issues identified are very much intertwined with related areas such as a lack of diversity and inclusion within the industry.

There is a perceived lack of availability at senior level – notably series producers and production directors – and a skills shortage/ gap at more junior levels with not enough 'standardisation' of skills.

- Series producers and producer directors are the most common grades cited as being in short supply, particularly in the areas of factual, documentary, factual entertainment (and to a certain extent entertainment). Assistant producers and production management staff were also seen to be in short supply.

- At more junior level, research participants highlight a general gap in skills and experience because of a lack of standardisation in formal and on-the-job training, leading to a workforce which is inconsistent in its ability to get the job done properly.

However, in reality there is much more complexity; the availability of senior workforce hinges on industry's ability to look outside of the regular pool of talent and arguably requires more risk-taking from commissioners and production companies as well as a greater focus on recruiting in a more considered way.

- There is frustration from many who took part in the research in a lack of willingness from commissioners in the UK and US to take risks on new, upcoming talent. Added to this, for some in production, their need to employ the 'best' creative talent also means they draw from a very small pool and so reduce availability of talent during busy production periods. In turn, this has a negative impact on the industry's ability to increase diversity and inclusion at a senior level.

- A lack of key competence in the way that productions interview and recruit also caused frustration, allowing conscious and unconscious bias.

Summary

Training more junior crew in the 'right way' to do things – both formally and on-the-job – in a more standardised way is seen to be important to ensure the UK can meet the demands of the market and protect its reputation as being best in class.

- The problems related to training are seen to have been caused by a lack of long-term investment, compounded by the shift to a more freelance workforce, making it harder for crew to access training and for production companies to develop skills.

- At the same time, there is seen to be a problem in the way the workforce is being trained with an inconsistent quality of experiences and skills being picked from production company to production company. This can lead to poor execution of even basic tasks.

In the long-term, tackling a lack of diversity and inclusion by increasing the opportunities for productions to try out talent from a wider pool will very likely have a positive impact on the availability of crew, particularly at senior level.

- On a day-to-day level, increasing diversity and inclusion is seen to be very difficult and targets set by broadcasters are not easily achieved. Finding someone to fill a role successfully is made harder if that person should also be from a diverse background.

- However, longer-term it is felt that fixing the lack of diversity and inclusion within the industry will pay genuine dividends on the availability of senior crew as productions can draw from a much wider talent pool. This requires effort from the production as well as from the commissioner in defining what 'good' means and allowing more controlled risk-taking in using upcoming talent.

Looking forward, there is uncertainty from some while others are more positive about the ability of the industry to play to its strengths and tackle threats and weaknesses such as changes in technology, the continued rise of new players such as Netflix and Amazon and consequences of continued high demand in UK television production.

Produced by:

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