

A large, dark silhouette of a professional camera rig, including a camera body, lens, and various attachments, set against a bright, glowing background. The rig is positioned diagonally across the frame, from the bottom left towards the top right. The background has a soft, warm glow, suggesting a light source behind the rig.

High-end television UK workforce in 2018 research report

March 2019

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Summary of key findings

- The explosion of demand for high-end production continues. The latest BFI statistics show a further increase in HETV production and an increase in production budgets in 2018.
- A lack of availability of crew and skills gaps remain the key issues for the majority of research participants.
- The recent surge in demand is exacerbating skills issues.
- Supply of crew has not grown in line with increased production, so the industry faces a significant crew shortage.
- The major consequence of a lack of available crew is stepping up too early.
- A shortage of skills and experience is driven by current demand as well as certain industry problems, such as a lack of standardisation within grades and regions of the UK, a lack of good people management, and skills associated with human resourcing.
- Hikes in crew rates are said to be running to levels which are detrimental to the industry.
- A clear hierarchy of shows within HETV has emerged, with the largest budgeted dramas more likely to be coveted by crew due to premium rates paid, the kudos of the ambition of these shows, a requirement for larger crews and the length of contracts on offer.
- It is becoming harder to find time for on-the-job training; high pressure shows provide less opportunity for job shadowing and less time for training.
- The way crews are coping with the current pressures demonstrates their resilience and ingenuity.
- Scarcity of line producers is becoming an issue as more Indies set up and employ experienced line producers as heads of production.
- Crew are working more weeks in a year and taking less downtime to recharge or to up-skill.
- This is resulting in more burn-out for crew and a less skilled workforce.

Background and objectives

ScreenSkills is the strategic skills body which administers the High-end TV Skills Fund. This fund is used to support skills and training in high-end television to ensure its long-term prosperity.

The organisation consults with the HETV industry to ensure the HETV Skills Fund is spent where it is most needed and in areas where it will have the most positive impact.

Key objectives for the research were:

- To identify the key skills shortages and associated issues from the HETV industry
- To enable ScreenSkills' HETV department to be more strategic in its investment plans for 2019 and beyond.

Research methods

- Qualitative: 61 telephone depth (semi-structured) interviews of approximately 30 minutes in length.
- Quantitative: 51 pre-interview surveys completed online.
- Fieldwork took place in August and September 2018.
- The sample consisted largely of those who were directly involved in crewing up productions, e.g. line producers and heads of production, with additional interviews with other senior crew members and those in broadcasting and support agency roles.
- 61% of interviews were among those based in London, 16% in the nations and 24% in the English regions.

Interpretation of findings

The majority of the findings within this report are drawn from qualitative interviews and therefore are based on individual opinions, reflections and experiences.

Key findings

The explosion of demand for high-end production continues unabated

Interviewees were not complacent about the extraordinary nature of the current level of demand for HETV drama production in the UK. There is a real sense that the industry is riding the crest of a wave. But the majority acknowledge the cyclical nature of demand. The current boom is not being taken for granted. Many see the current situation as a bubble which is set to burst at some point.

The overriding drivers of the current demand were cited often by interviewees as:

- The UK Government's tax incentive encouraging more HETV production from within the UK and, crucially, a very high level of inward investment from outside the UK.
- A favourable exchange rate, particularly with the US dollar.
- A marked increase in the level of investment in drama linked to the growth in popularity of SVoD and the size of the commissioning pot for services such as Netflix. UK broadcasters appear to be following suit with more being spent on HETV drama in order to remain competitive.

The UK HETV market appears to have matured to the point that tiers of productions based on size of budget are more likely to be mentioned by interviewees in 2018 compared to 2017. This is described in terms of cost per hour as:

- Lower HETV: £1 million-£2 million per hour
- Mid-level HETV: £2 million-£3 million per hour
- Higher HETV: £3 million+ per hour.

"It is very exciting to be at the forefront of."

"The opportunities and the range of work are so exciting."

Conversations with interviewees suggest that these tiers represent a definite hierarchy - the bigger budget shows being more coveted due to the premium crew rates available and the kudos of working on the most expensive, the most glossy and often very ambitious TV drama. Consequently, levels of competition for crew and skills emerge within HETV.

Higher budgets and ambitions, as well as increased competition, all add to the already high level of risk attached to producing TV drama. The crew and skills-related issues which are discussed within this report compound the risk further.

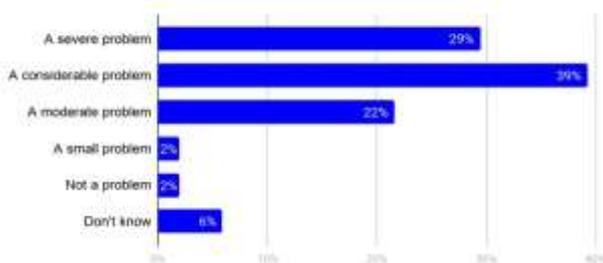
A lack of availability of crew and skills gaps remain the key issues

“Every job is a struggle...”

The skills issues within HETV are continuing for those involved in and around the production process - whether thought of as a skills shortage or skills gap. This was made very clear from both the pre-interview survey data and from conversations with interviewees.

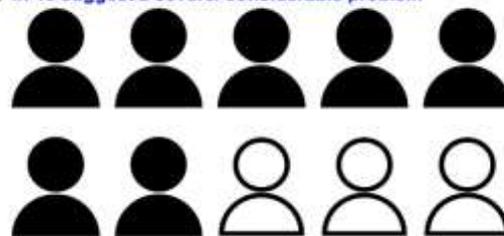
Close to 70% of those who took part in the pre-interview survey cited the issue as either “severe” or “considerable”.

Thinking about only high-end TV Drama production in the UK, how would you assess the issue of a 'skills shortage' or a 'skills gap' in UK television production?



Assessment of HETV skills shortage/gap...

7 in 10 suggest a severe/considerable problem



Pre-interview survey n=51

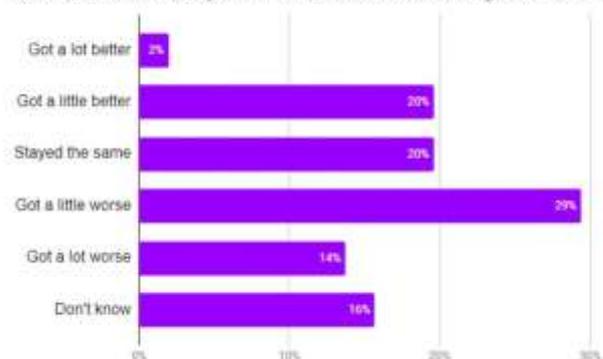
From analysis of the interviews, it is clear that the most common day-to-day impact of the issue is either difficulty in physically finding someone to fulfil a role - most commonly thought of as a ‘crew shortage’ - or not being able to find someone with the necessary skills and experience - most likely referred to as a ‘skills shortage’ or ‘skills gap’. When probed upon this, a clear majority assert that both the issues - a shortage of crew and a gap within the skills or experience among those who are available - are creating problems in equal proportions.

Worryingly, when asked about the change in HETV skills-related issues over the last 12 months, almost twice as many participants considered the issues to have worsened compared to those who thought they had improved.

The key issues of crew availability and skills shortages and gaps are well known and spontaneously mentioned by nearly all of those who took part in an interview. The factors which drive and cause these two main issues are more wide-ranging and dependent on circumstance.

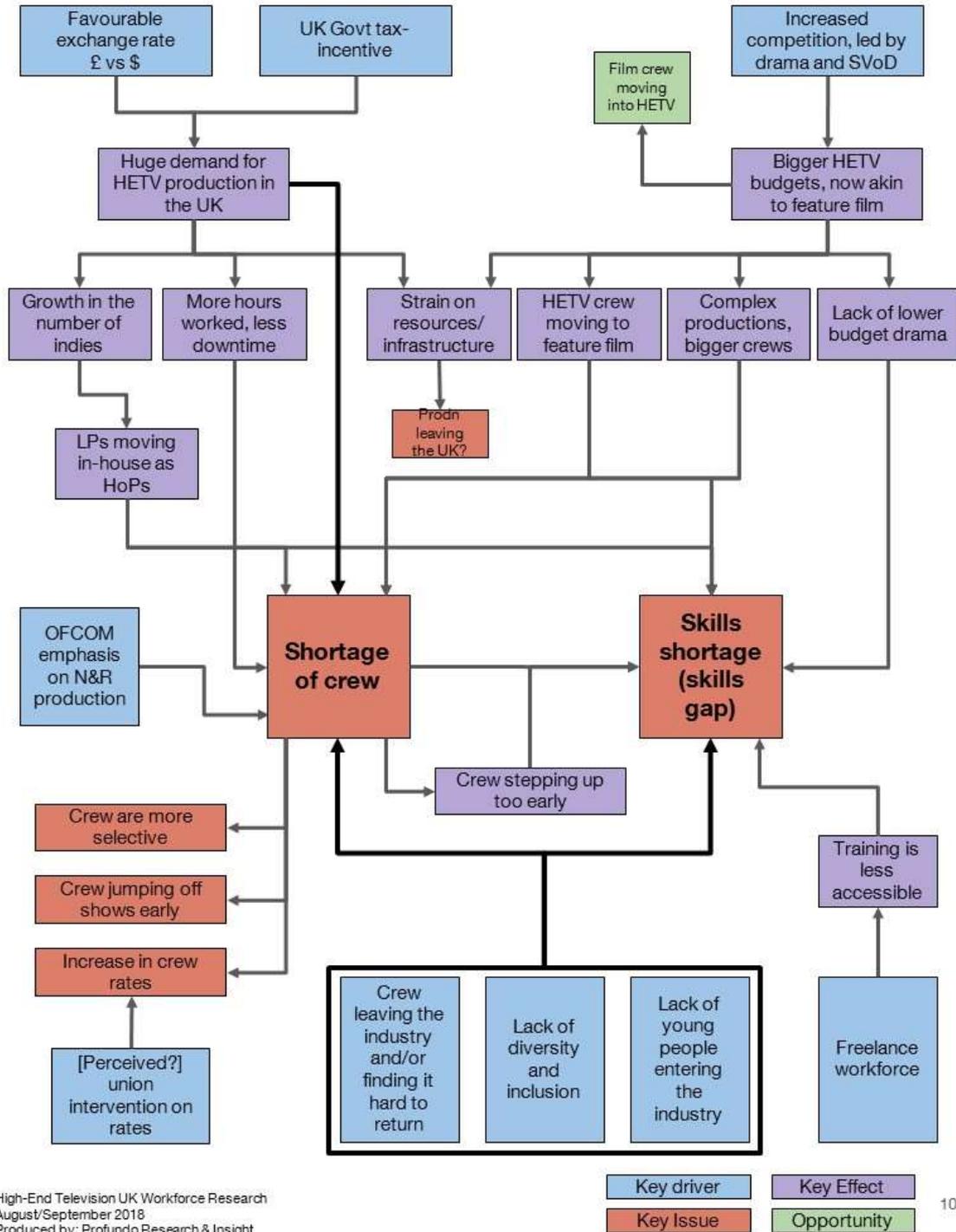
The drivers, effects and issues are mapped out on the following section.

Over the last 12 months, do you think the issues related to skills in high-end TV Drama have:



Drivers of, and effects on, skills-related issues

Mapping the drivers, effects and issues related to HETV crew and skills shortages in 2018



The recent surge in demand is exacerbating skills issues

The consensus is that an increase in demand for HETV production is contributing to the key issues of a lack of availability of crew and lack of skills and experience. The main effects of this demand are:

A growth in the number of indies

The increase in demand for HETV drama has led to an opportunity for a number of new indies to set up and deliver this work. One result is a rapid increase in the number of in-house heads of production roles which have been created and are often taken up by experienced line producers, taking them out of the pool of available production crew. The peer-to-peer heads of production group has seen its membership rocket from around 12 people eight years ago to approximately 85 now. This increase has had a significant impact on the number of experienced line producers available for production work - a significant skills gap which has needed to be filled, often with more junior line producers or those stepping up from lower grades.

Crew are working longer hours and more weeks of the year

Such is the level of demand, crew are working more weeks in the year than they have done historically - reportedly up to 50 as opposed to approximately 35. Not knowing when this bubble of demand might burst, they are reluctant to turn down offers of work. Downtime, which allows decompression from long hours and very intense, stressful work, is therefore either harder to come by or is not happening at all. Interviewees report of crew becoming ill from not having the benefit of significant breaks between jobs. This is also highlighted as a reason for burn-out and people leaving the industry prematurely in order to seek work that has a more sustainable schedule.

Capacity

In one person's view, the level of inward investment in the UK is "*a massive drain on resources*". This sentiment was shared in at least some way by most interviewees. Not simply an issue which affects London, interviewees now talk of regions and nations such as Manchester filling to capacity. One interviewee in Northern Ireland claimed that the current level of demand was the busiest they had ever witnessed. This was echoed in Wales.

One benefit of the level of inward investment is that a lack of resources, such as studio space and unit bases, within London continues to push productions outside of the M25. More productions based in the nations and regions is a positive trend so long as local crew and facilities can meet this added demand. However, even when there are good-sized crew bases outside of London, their availability is more susceptible to fluctuations in demand and the number of shoots happening at any given time. In some cases, crew needs to be brought in from, for example, London which can add to the cost of production.

The lack of resources or 'space' in the UK leads to a concern that productions will leave the UK for Eastern European countries such as Lithuania who are setting up their own tax incentives to bring in more inward investment. This view appears more common from those who are sceptical about the long-term sustainability of the current demand in the UK. Others argue that the UK, and especially London, will always be an attractive location for drama production.

The recent surge in demand is creating new opportunities and challenges

More movement of crew between HETV and feature film

Interviewees describe how the increase in size of TV drama budgets has led to the distinction between HETV and feature film being less pronounced. As HETV budgets continue to increase,

the gap between the two closes further. One consequence is more crossover of on and off-screen talent.

A number of interviewees highlight the movement of crew who have traditionally worked in feature films towards taking HETV production work offering similar rates and experience but for longer periods of time. Similarly, crew who might normally work on HETV are able to cross over into feature film production. This is perhaps both an opportunity and a threat for HETV, although more fluidity between different forms of production is likely to be of benefit to the industry at large.

More complex productions, bigger crews

“People disappear for years...”

The biggest budget dramas, those with more locations, units and ‘ambition,’ require larger crews to carry out the level of work required with more complex production procedures. Added to this is the level of compliance and associated paperwork which is now a feature of the production process. The production office has expanded in numbers and number of grades as have other teams, noticeably the art department. Another feature of higher budget drama is the length of shoots which can mean crew are taken out of the availability pool for ever increasing periods of time.

Lack of lower budget drama

The emphasis on funding and developing high-end drama in order to take advantage of the tax incentive has highlighted an issue raised by interviewees relating to lower budget drama. They describe a time when lower budget drama was an area of genuine experimentation and an excellent learning space for up and coming crew and talent.

The lack of commissioning of this form of drama is felt to be having a negative impact on the ecosystem. Interviewees lament the loss of shows such as *Misfits*, *Being Human*, *The Diary of a Call Girl*, *Skins* and *No Angels*. These shows are described as a “brilliant training ground” in which crew and filmmakers were allowed to learn, gain valuable experiences and make mistakes without high-risk multi-million-pound budgets and global exposure.

Interviewees believe that crew rates are now so high that it is very unlikely these types of shows will be made in the future. This means more of a skills and experience gap between high-end drama and continuing drama and there is some debate from interviewees as to whether the jump from continuing to high-end is feasible or not.

A workforce of freelancers

“No one has a duty of care towards a freelancer...”

The changing nature of the TV industry meant the growth of a freelancer workforce. Research participants frequently mention the difficulty this creates, particularly with regard to training. Freelancers are now responsible for their own development, training and promotion prospects.

Interviewees see that the cost of training is hard for a freelancer to shoulder; training implies a financial investment as well as an investment in the time required to participate. This can translate into a loss of potential earnings, especially in the current climate where crew are working so many weeks of the year.

In times of such high demand for crew and larger, more complicated shoots with higher levels of budget, there also appear to be fewer opportunities for job-shadowing and on-the-job training.

Another interviewee highlighted that the lack of access to training requires a shift in the culture of the industry to allow crew to take time off and be released when necessary. One person described a culture of ‘you can’t ask twice,’ meaning you could take time off only once without suffering some sort of penalty (perhaps you are overlooked on the next job or you lose pay) and so requests to take time off are kept only for a genuine emergency.

However, a small minority of interviewees argue the wind is changing direction slightly and that production companies do accept some responsibility over the freelancers they employ. There are signs of some of the bigger companies taking more interest in the development of the freelance workforce by offering their own training opportunities.

A lack of young people entering the TV production industry

A common theme from this research is the perceived lack of young people entering the industry and the lack of awareness of the breadth of roles which are available to them. The lack of production accountants is often linked to the perception that young people who are interested in accountancy do not see TV production as an appealing option. Production office roles are also identified as those which are less likely to be considered in favour of the more desirable areas such as camera-operating and directing. There is also concern that the industry still retains too much of a sense of mystery and is seen to be overly nepotistic.

The industry is losing people to burn-out

Burn-out is a concern raised by those who feel the industry is losing people due to the increasing levels of complexity, intensity and associated levels of stress. It is also seen that the industry makes it very difficult for someone to return to after an absence, most obviously women who leave to have children. A small minority of interviewees mention improvements in encouraging people back to the industry, but there is a definite sense that job-sharing opportunities are very hard to come by unless they are taken up by in-house roles.

Implosion is not an option; crew are hard-working and resourceful. Instead they accept this 'new normality'

Research carried out for the High-end TV Skills Council in 2017 revealed a genuine sense of alarm from some at the challenges faced, such as difficulties in finding crew and the hike in crew rates. In 2018, these challenges are no less fearsome. In fact, to many of those interviewed the situation has got worse as the industry continues to get busier and busier.

Those within the industry are now more resigned to the situation and see the new ways of working to cope with such challenging times as a normality. They perhaps regard it as a short to medium-term situation and are ingenious and resourceful enough to 'get on with it'.

That said, a significant proportion of interviewees cite signs of change within the industry, for example:

- Generally more awareness of the need for training to tackle skills and experience gaps.
- Some positive impact being made in tackling crew-related issues, driven by ScreenSkills initiatives such as Make a Move. This is particularly the case for those who have either made use of such schemes or benefited directly themselves.
- Working within the sellers' market, a small number of interviewees mention that production companies are starting to recognise the need to encourage some loyalty from the freelancers they work with, perhaps by offering training.
- There is also evidence of productions becoming more 'family-friendly' by creating opportunities to help people return to work.

Shortages: crew, skills and experience

Supply of crew has not grown in line with increased production so the industry faces a significant crew shortage

A clear story emerges from the conversations with industry; that the growth in the volume of high-end productions, and their increased complexity, has not been matched by a growth in the supply of crew. Hence there is a significant shortage of available crew.

This has created more of a sellers' market - crew being far more in demand - quite unlike the buyers' market that characterised the industry before the introduction of the UK Government's tax incentive. Before the boom in demand, pay rate increases were perceived as being very slow and opportunities to step up were infrequent.

Now, when crew are in much higher demand, some argue the market has seen a rebalancing; crew rates are increasing more quickly and the time taken to step up to the next grade is shortening. However, the majority of interviewees who were asked about this rebalancing thought that the situation may have gone too far, that crew rates are spiralling upwards and that crew are stepping up too early and without the necessary experience.

The lack of availability means crewing up is taking longer which can be a real issue especially when a commission is greenlit late. A lot more time is now spent sourcing and researching crew as well as contacting and calling people only to find they are unavailable.

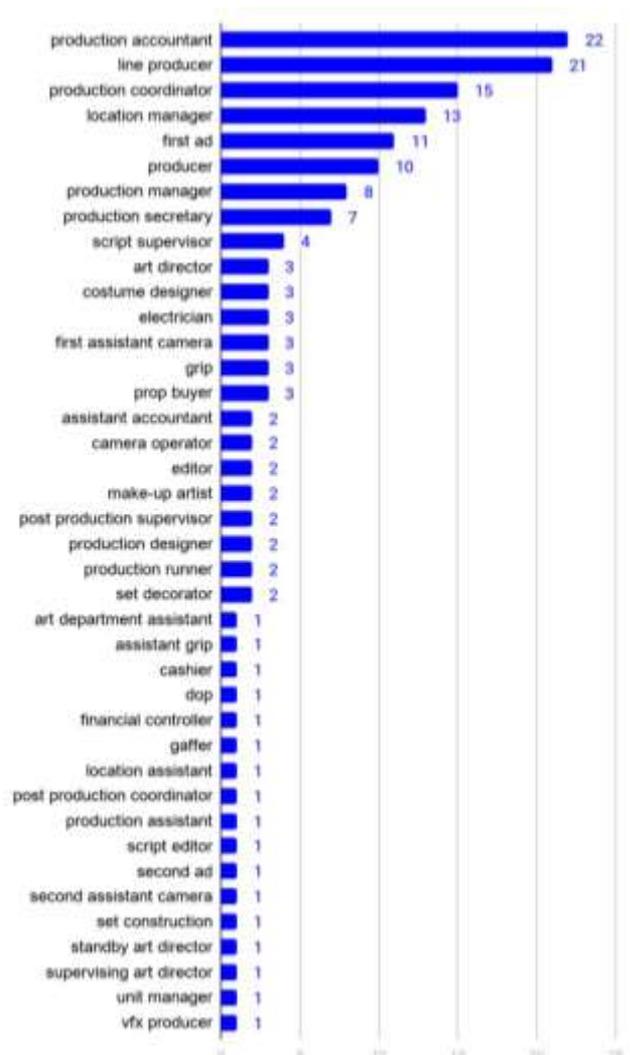
“Over the past few weeks I would have spoken to well over 50 people trying to find someone [an accountant].”

Experienced (i.e. desirable) and available crew are said to be more selective in the work that they accept, with suggestion from interviewees that they are perhaps more reluctant to take a job which requires extensive travel or time away from home. Others are said to be available, but holding out for a bigger show at a higher rate to come in.

Stories of crew jumping off shows before completion, even just after they had started, were rife in 2017 and the same is true in 2018.

The higher rates, the longer shoots and the potential level of experience on offer go some way to explain this behaviour from what are said to be mainly more junior crew. It shows a general lack of loyalty, but is not so unexpected from a workforce driven by market forces and made up largely of freelancers.

Teams of crew who would normally work together and move from production to production are now falling out of sync with each other due to the volume of job opportunities and the lengths of shoots. This preferred way of working as a team, creating a 'shorthand' where crew know each other and trust in one another, is being made more difficult and forcing teams to look for new people more of the time.



Availability of crew in the nations and regions

The additional level of demand for HETV production is having an impact in the nations and regions (N&R) with interviewees based there claiming to be enjoying their busiest time ever. Interviewees report that with a squeeze on crew and facilities within London and the added emphasis on N&R production from broadcasters via Ofcom, there is an appetite to shift production outside of the M25. The movement of HETV away from London is a trend which looks set to continue.

Availability of crew in the nations and regions is tied much more closely to the number of productions which are already shooting there. It does appear that the experience of producing HETV drama in the N&R is dependent on timings and circumstances. For example, it was suggested that “bad timing”, where a number of productions are shooting at the same time, could create an issue with crew availability while at other times the level of demand was sustainable.

Employing local crew does seem to be the preferred option for many. However, negative perceptions of crews in the N&R do persist, particularly from those who work mostly in London. The smaller pool of crew and problems with finding crew at busy periods adds to the negative bias. Crews in the N&R are far more likely to work across different forms of production: HETV, non-scripted, comedy, continuing drama etc. But even the willingness to work across genres and different forms of production is sometimes seen as demonstrating a lack of expertise as opposed to a ‘can-do’ attitude.

Heads of department (HoDs) are key roles often brought in from London. This is potentially detrimental to the development of regional HoDs who lose out on the experience and are perceived as less equipped to pitch themselves fully.

The presence of a long-running production can have huge benefits to the N&R. The obvious example is *Game of Thrones* in Northern Ireland, where costume, hair and make-up, locations and art department crew have flourished. These crew will often stay on the same job, particularly when there is such a long and sustained block of filming.

Stepping up too early is the major consequence of a lack of available crew for research participants

The grades cited by interviewees as being in most demand suggest there is more of a crew shortage at senior level. In the face of such high levels of demand, individuals and productions are stepping crew up early to plug the gaps. Where this creates subsequent gaps further down the chain of command, further early stepping up is required. This appears to be an understandable way of coping; the level of demand as it currently stands means that industry cannot wait for experience to come through of its own accord.

However, the problems associated with crew stepping up too early remain a very important issue, with interviews suggesting that the situation has worsened over the last 12 months. Crew are either pitching themselves as a higher grade without the required amount of experience or they are being stepped up by a production to fill a gap and solve the problem of finding crew.

“Sometimes you’re having to hire people who don’t have enough experience on a wing and a prayer hoping they’ll step up and not make mistakes.”

It is accepted that in the past, in times of less high demand, stepping up was perhaps too slow a process - particularly when matched against the ambitious nature of young crew. It is also accepted that there is a responsibility from productions to step people up and help them progress. However, the current situation is seen as creating real problems, costing both time and money for high-end productions.

Sometimes these problems can be at a basic level - for example, a lack of understanding of how to complete a progress report or continuity report. A more fundamental example might be a lack of

knowledge or appreciation of the importance of insurance which means policies are not being arranged in time for a block of filming. The increased complexity of HETV production and the ever-increasing budgets can turn 'simple' mistakes into costly problems which it was suggested could run into hundreds of thousands of pounds if errors were made at a senior level such as art director or accountant.

Others report problems of crew who have stepped up but don't know the ropes, have a lack of confidence, speed and efficiency. They may need to have things explained to them again and again which is not always easy on a busy and stressful shoot. If additional crew are to provide the necessary support, then this can add to the cost of production.

Being promoted too soon is also seen to be a source of stress and burn-out among those who step up too early and this may also lead to people leaving the industry prematurely. The problem is exacerbated when stepping up too soon means bad practice is passed on from those who have not been properly trained in the first place. One interviewee described a generation of crew coming in who haven't had the proper level of training to justify their grade. Another described a third AD who was seen searching on Google to find out how to carry out their role.

"I watch over my young line producers like a hawk. We are on their case all the time, checking stuff to make sure it's done properly."

Interviewees in the nations and regions report that stepping up too early is prevalent in their area, where the availability of crew can fluctuate more severely depending on the level of demand.

Yet when carried out in a controlled way, interviewees recognised that stepping up can be highly beneficial. They also recognise they have a duty to step people up and keep developing crew. This is particularly the case if the candidate is someone they have worked with previously and the right level of support can be put in place. This is one reason the Make a Move scheme is so lauded by those who have used it. Stepping up may work well with a returning series where a number of crew return to the same production and their progression can be better managed. The steps between some roles are recognised as being larger than others and so the required skills and experience needed to step up can be more substantial.

"You don't have to wait for the old guard to fall off their perches. Now there's more opportunity for everyone."

Lack of standards and need to professionalise the industry

The lack of standardisation over what a candidate requires for a certain grade or role is one area which appears to create problems, where the skills and experience for a given grade can be quite different in one person from the next.

One interviewee suggested that ScreenSkills' Skills Passport - described as a "brilliant thing" - would tackle this problem if it were fully adopted by production companies in a similar way to how health and safety training has been in the past.

There was widespread concern over professionalism within the industry and the need for more 'soft' skills and business skills. The vast majority felt that there were some behaviours and skills generally lacking or quite absent from the industry altogether. For example, a number of interviewees suggest that management skills in the industry appear to have been largely self-taught and lack formality. Many welcome the ScreenSkills HETV Leadership and Management training. Some suggest that HoDs could help improve the soft skills of their teams.

Problems include:

- Poor people management and leadership skills due to a lack of training and experience.

- Lack of good communication skills.
- A lack of conflict resolution and conflict management experience.
- Bullying in the workplace.
- Low confidence and a lack of confidence building.
- New entrants not being 'production-ready'.
- A lack of rigour in recruiting and interviewing - introducing conscious and unconscious bias.
- A lack of duty of care over crew, particularly freelancers e.g. professional development.
- A lack of anyone skilled in and dedicated to tackling a range of HR-related issues.

Given an individual production can run into very large numbers of crew, can last for more than 12 months and be highly complex, some interviewees found it worrying that HR-related issues are dealt with by those who are not always qualified to do so. Without an HR function, it was felt that people-related issues are not always given the required level of priority.

“It has to be addressed [lack of HR function] because your average line producer, production manager, production coordinator, head of department or AD are really not qualified to deal with the kinds of issues people are facing these days.”

Potential impact of increases in crew rates and other costs

A high level of demand on crew and resources inevitably has the economic effect of an increase in prices. This is not just crew rates, it also has an impact on the cost of locations, studio space etc.

As with crew being stepped up too early, there is a strong sense that for a long time - pre-dating the introduction of the high-end tax incentive - crew rates had not increased. Some rebalance was required.

However, the growth in crew rates which were reported in the 2017 research continue to increase at what is described as a “phenomenal” rate under the conditions of a sellers’ market. The perception is that the rates are being driven by US inward investment into the UK. Certainly, the US productions tend to be the ones with the biggest budgets. However, it was noted that the size of these budgets can be misleading when you consider the proportion which is spent on VFX and post-production services.

Rates are rising across all aspects of production: crew, talent, locations, facilities. Factors cited as accounting for the increase included new conditions of service agreed between BECTU and PACT, strong unions and guilds and crew moving over from feature film production.

As with the feedback collected in 2017, some interviewees referenced the ‘Irish example’ where a buoyant production industry in Ireland was brought down by large hikes in pay.

Those most likely to suffer from the increase appear to be domestic UK broadcasters who try hard to push back on rate increases due to lower budget levels. There is also a feeling that the impact is being felt more generally in lower budget levels of TV production such as comedy, where crew are encouraged by the high rates to switch to working in HETV.

One question posed is whether the financial advantage of the tax-break in the UK is decreasing in value due to higher levels of crew rates.

Compromising to address crew shortages

The process of crewing up has been described as ‘fighting’ for crew, a fight that requires perseverance and resilience to win. There are a number of ways in which productions can and do cope with crewing up:

- Starting prep time earlier, trying to secure people well in advance. This is obviously not an option where you have a late commission
- Some productions have been willing to pay individual crew a retainer fee to book them on to a job early. Loyalty in the sellers' market is harder to come by
- Relieving pressure on a UK production office by placing more emphasis on secondary production offices, perhaps in another country
- Bringing in foreign crew - those mentioned include Malta, France, Germany and Spain - some of whom do not require accommodation and so can be hired at competitive prices. This often works best where there is an international element to the production.

Compromise is a common way of dealing with issues of a lack of crew. Often it appears the case that a second or third choice head of department is employed because the first choice is unavailable. The market conditions present an individual HoD with the chance to prove themselves and become the first choice on the next production. However, not having a first choice available, particularly at HoD level, is potentially a big issue if the production then lacks the experience required. This adds to the sense of risk which is already very high.

In the nations and regions there is more use of 'universal' crew who work across a wider set of genres and more disciplines of production. This reflects a 'needs-must' approach and is very different from the siloed nature of crew in London. It raises the question whether there is scope for using crew with different yet complementary skills and experiences in London.

Those responsible for finding and securing crew find new and ingenious ways of plugging gaps and structuring a crew base such as bringing in production managers from non-scripted TV to fill a line producer role. These options can work if people who are less experienced are surrounded by those with higher levels of experience. This might affect the production budget and increase the level of risk and stresses on others but is a solution nonetheless.

Another option is to bring in crew from another area, even from outside of London into London. However, this, too, can incur additional costs and the 'cost' of such a fix might not just be financial as it can change the culture of a production.

Could widening the 'considered' talent pool be a solution to the problem of shortages?

A small number of interviewees felt the real issue is that employers are not reaching out widely enough to consider all available crew. They argued that if the industry is going to sustain the high level of production, there will be a need to recruit into the industry from a far wider pool.

This has clear implications for recruiting new entrants. However, senior interviewees do not feel that TV and specifically drama production is a popular option among people starting out on their career, with some perceptions that it is too demanding, with extremely long days and schedules. Entering the world of work as a freelancer and not as an employee is another potential deterrent.

Interviewees also feel there is a general lack of awareness of the many roles and therefore opportunities that exist within TV, which explains why accountancy and production office staff are in such short supply. It was thought that those who might not consider production a "proper job" (a phrase commonly used by interviewees to describe TV production) could be encouraged into the industry if they realised there was a high demand for workers and a good level of salary to be achieved.

Despite the number of valuable courses, advice and support materials available to people who are considering the industry or who are starting out in it, the general feeling is that a more concerted effort to recruit at school, college and university is needed to bring in the required volume and breadth of new talent.

It is felt that young people starting out in the industry do not always appreciate the need to start at the bottom and work their way up – that having completed a course in education in producing or directing, they are not a producer or director and are more likely to start their career as a runner.

The need to recruit more widely is not limited to new entrants. It is seen by many as a necessary way of solving the current lack of crew who are working in the industry. Here there were some potentially conflicting points of view:

- The HETV industry should open up opportunities more widely, including bringing crew through from other forms of TV
- At the moment, the industry still has a ‘closed door’, nepotistic approach and that the current talent pool just isn’t big enough
- However, there can be a reluctance to use new people who are unknown in terms of their abilities and temperament
- Some feel that if someone is not in work they must therefore be lacking in skills, experience and/or personality.

“If I’m being blunt, generally if they [line producers, accountants] are available you have to wonder what’s wrong with them, because it’s that busy everybody should be working.”

Those who are responsible for crewing-up commonly use lists as the first option for recruitment, made up of people who have worked together before augmented by reviewing the credits of particularly relevant shows.

Word of mouth is also important and often HoDs provide lists or referrals of the people they wish to work with. There are reports that some HoDs, having themselves been selected by an exec, producer or director, can be less open to ‘new’ people.

Agents are typically used, particularly for senior crew, and dairy services are mentioned as another source of crew. There are some concerns that well-known databases are not always easy to use or lack information on availability. There is an acceptance that ‘good’ and busy people simply don’t have any incentive or need to keep their status updated on a website or list.

A number of interviewees then mention Facebook, WhatsApp and other social media tools as a potential source of crew.

There is a sense that the industry is small and some frustration that the names available are “not even close” to a full list of potential candidates. Widening the pool of crew considered for HETV productions also has clear implications for improving the diversity of crew.

Diversity and inclusion: harder to achieve due to lack of crew availability or a longer-term solution to a growing skills crisis?

Diversity and inclusion are a major concern. It is felt there is a long way to go and much more can and should be done. Interviewees recognise there is collective responsibility to improve the situation. They also recognise that there are talented diverse crew working in HETV, but there are not enough of them and they tend not to be in senior positions. A number of individual schemes and initiatives were mentioned, such as Sky’s target for HoDs.

Discussion over diversity often focuses on ethnicity but an influential minority of interviewees suggested industry should be addressing social inclusion and social mobility; TV is still “dead posh” and that is the biggest problem. Research participants also consider gender equality in production as an important goal although some see gender equality as having been largely achieved. They do not see inclusion with regards to sexual preference as an issue.

There is broad consensus that achieving a diverse and inclusive crew base is made much harder by a lack of crew generally – a sense that it is hard enough to find crew as it is. It is recognised that

the long-term ambition of getting more crew into production presents a good opportunity to get a more inclusive crew into production. In the words of one interviewee, there was no incentive to think more widely about crew when there was far less demand for them the supply of crew outstripped the work. Now, when demand is so high, it is in everyone's interest to draw on a wider pool.

Work to challenge any perception of television production as an elitist industry and explain the full range of opportunities should start in schools, colleges and universities. Allowing those who haven't been to university greater access to the industry is also offered as an idea. Some believe change will come from crew themselves – that industry leaders can talk about it all they want but change will come from crew who want to work in a modern, representative workplace. However, there are concerns that without the right duty of care, those who are from a diverse background and who are less likely to see people like themselves in the industry will find it tougher to progress and will be more likely to drop out.

On a practical note, it was noted as being near impossible to identify someone's background from a crew database or list.

"I know one female sound recordist, two female DoPs. That's more than I knew 10 years ago so it's obviously improving but it's very, very slow."

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