



High-end television in the UK 2020 workforce research

Spring 2021





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Background and objectives

ScreenSkills is the industry-led skills body for the UK's screen industries. Within its remit, ScreenSkills administers the High-end TV Skills Fund - operating and developing strategic initiatives to tackle the skills shortages and skills gaps within the high-end TV (HETV) space.

The HETV team within ScreenSkills has previously identified the need to consult with the HETV workforce and industry support organisations to deliver feedback. This feedback is used to inform the HETV Council and Working Groups who decide on where the investment funds will be utilised each year to ensure the skills fund is spent in the areas of HETV where it is most needed and where it will have the most positive impact. Research findings from 2020/21 will inform spending in 2021/22.

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

Key objectives for the research were:

- To identify the key skills and grade shortages and associated issues from the HETV industry
- To enable the ScreenSkills HETV department to be more strategic in its investment plans for 2021 and beyond

The objectives, method and scope of the research has remained consistent over time.

Research method

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

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

- Qualitative: 41 telephone depth (semi-structured) interviews approximately 30 minutes in length
- Quantitative: 39 pre-interview surveys completed online

Fieldwork took place in between November 2020 and February 2021 - a slightly extended period compared to previous years, allowing more time to accommodate the impact of the coronavirus pandemic and associated lockdown period (from January 2021).

The sample consisted largely of those who were directly involved in crewing up productions, eg line producers, heads of production with additional interviews with other senior crew members and those in broadcasting and support agency roles.

56% of interviews were among those based in London, 18% in the nations and 26% in the English regions.

The interviews followed the same topic guide, comprising: top-of-mind issues, focus on skills gaps and skills shortages, drivers of skills gaps and shortages, dealing with issues and support received, perception of future skills issues. In 2021/22, additional questions were added about the long-term impact of the coronavirus pandemic and the impact of the introduction of virtual production methods.

Interpretation of findings

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

Context: current challenges faced by high-end TV

Coronavirus

The impact of the virus on HETV productions and shoots in 2020/21 cannot be underestimated.

"Our day is now run by Covid."

- Head of production

"It's Covid from morning 'til when you go to bed."

- Head of production

The pandemic was described by one interviewee as "the biggest impact there's ever really been" on the industry.

A key observation from the research process is that overcoming the challenges of the coronavirus to return to shooting HETV has been a huge accomplishment. The way in which the HETV industry has stepped up and dealt with the challenge is a genuine testament to the resilience and ingenuity of those who work in the industry. As highlighted in the interviews, the work of the HETV industry was already incredibly challenging under very high levels of demand for production work and pressure placed on crew. Added to this, the high proportion of freelancers in the workforce (62% of the sample were freelancers) means that there isn't the formal structure and support in place to enable them to voice any concerns as part of a formal appraisal process which they would have access to within a company structure.

According to those interviewed, coronavirus is not just a workforce issue but has also impacted heavily on budgets as a result of introducing new protocols, equipment, additional crew and a need for higher levels of insurance. Pausing shoots due to Covid has been both time-consuming and expensive. It has also impacted negatively on the move towards sustainability, reintroducing single-use plastic and increasing reliance on using cars and vehicles.

In terms of its impact on skills shortages, it has been suggested by interviewees that new roles such as Covid supervisor have tended to be filled by existing crew eg those from the production office, which has in turn placed more pressure on finding crew to fill their roles. This appears to be particularly the case for production coordinators and production managers moving into Covid supervisor roles where rates of pay are said to be higher. More positively, and potentially as a way to relieve the pressure on crew shortages, there were also examples given in interviews of people moving into the industry from the theatre and events industries to take on Covid-specific roles.

Conversations with research participants have suggested Covid has also highlighted issues around non-technical and craft skills, such as the ability for individuals to self-start and self-manage when working remotely and from home.

More positively, it was suggested that additional HETV production work has come into the UK as a result of the pandemic - an example given within an English region where a production was moved over from eastern Europe because the UK was perceived to be a safer place to shoot under the pandemic.

The impact of Brexit

The common theme regarding the impact from the departure of the UK from the EU on 31 Dec 2020 is that it was not currently being considered to any large degree, a very similar theme from interviews in previous waves of HETV research. In fact, one interviewee suggested they were ignoring it for now.

The impact of Brexit very much takes a lower level of priority compared to far more present issues such as coronavirus and some of the daily challenges of producing and shooting HETV. The nature of production work would appear to focus attention on what is happening here and now as opposed to what is going to happen in the near future.

That said, a minority of interviewees were considering the impact of Brexit, although this tended to be those who were planning an upcoming European shoot. There was some concern, and also confusion, over what might be required in terms of visas and associated paperwork.

Budgets

Budgets are still felt to be increasing and therefore widening the gap between the 'smaller' highend TV productions which sit in band 2 of the 2017 PACT/BECTU TV drama agreement (£850,000 to £3 million per hour) and those which sit in band 3 (£3 million+ per hour).

As highlighted by many interviewees, this is very much linked to a corresponding increase in rates of pay. Rates are still said to be further increasing (see section below for more detail) which is driving the attention of crew towards the higher budget shows. The effect is that lower budget HETV productions struggle most to find experienced crew.

Increasing complexity of production

Again, a theme from previous rounds of HETV research, there is still a sense of increasing complexity of HETV productions, notwithstanding the added challenge of dealing with the coronavirus pandemic.

Increased complexity and scale of HETV content is linked very much to increasing budgets, which interviewees sense show no signs of abating. Higher budgets bring more complexity through added risk, more paperwork and a larger crew base.

Virtual production methods

The overall response to the question of increasing use of virtual production methods is that interviewees feel it hasn't made a big impact yet, but is coming down the line.

Any current impact appears to relate more to the biggest budget dramas, where the lines are more blurred between TV and feature films and which involve more complexity in terms of using more VFX, green-screening etc. The perceived impact of virtual production was also commonly suggested as being within post-production as opposed to live production.

That said, there were new and emerging roles mentioned by research participants in the virtual production space. These included: VFX producer, digital imaging technician, video ops, video assistant, mix and overlay technician.

New opportunities were suggested in this area for existing crew to retrain into, as well as an opportunity to help IT providers who work with productions to better understand the production industry and its needs.

Wellbeing

The issue of mental wellbeing and mental health was raised by research participants during the indepth interviews within the context of how this was impacting on crew stepping up too early and productions increasing in terms of budget, size of crew and complexity. Generally, the perception among interviewees of the mental health situation in HETV is that it is getting worse.

Participants suggest the coronavirus pandemic has brought the issue of mental health up the agenda, which may be seen as a positive of the pandemic. More time has been given to discussing

mental health and the use of video calls and meetings has allowed managers to be more appreciative of others' personal situations. The issue has literally become more 'visible' in 2020/21 and there is a desire to maintain this new sense of openness going forward.

One production company was mentioned, for example, for investing in training up mental health first-aiders. Other companies could consider doing likewise.

Culture and perception of industry – outreach

Interviewees frequently raised the point that one way to combat crew shortages in the longer term is to further promote roles within the HETV industry to young people, especially those in school, college and university. Participants believe that some of the perceptions of the industry among those in education remains a potential barrier, for example, because of the perceived lack of job security. Work needs to be ongoing to inform younger people about the wide variety of roles available and not only about directors, producers or DoPs.

A recruitment campaign to highlight the reward of a career in HETV as well as the wide range of roles has been mooted by several interviewees.

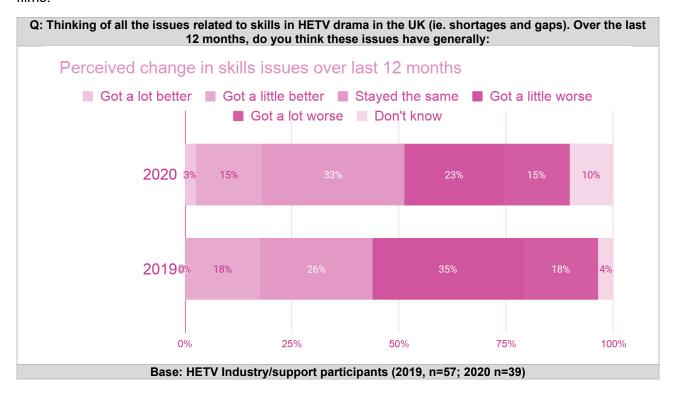
There were examples given during the interviews of individual productions reaching out, particularly to those in education through providing work experience or putting on events aimed at those in education.

Signs of some improvement

Despite the huge challenges posed by coronavirus, when asked about all of the issues relating to skills in HETV in the UK, around one in five (18%) suggest the situation has improved ("Got a lot better"). Encouragingly, this is the same score seen in the 2019 research.

What is even more positive - or more specifically *less negative* - is the proportion of those saying things have got worse. In 2020/21, 38% of survey participants suggested skills-related issues have got worse ("Got a little worse" / "Got a lot worse"), a smaller percentage than the 53% in 2019.

More investment in HETV has attracted more crew who would have previously worked in feature films.



Key topics in detail

Potential longer-term benefits of having to review working practices due to the pandemic

Clearly, and as mentioned earlier in this report, the impact of coronavirus has been hugely challenging for the HETV industry. That said, there are elements of the way the pandemic has been managed which interviewees suggest may provide improvements to working practices long term.

A time to reflect

As with many aspects of life, the pandemic - more specifically the first period of lockdown where HETV production was put on hold - has provided time to reflect. Examples of this type of reflection include:

- Being more aware of how people treat one another
- Thinking differently about how the industry behaves and operates
- How the industry might adapt to offer more flexible working arrangements
- The level of travel and the size of the industry's carbon footprint

New practices

The planning of protocols and procedures to cope with the virus in a production setting have also raised some interesting opportunities for new ways of working and to question why things are done as they are.

This consideration and reflection relates to working practices, health and safety as well as workforce wellbeing and mental health. People have both literally and figuratively given each other 'more space' - meaning greater consideration to others and to those in different departments.

One example of new working practices was a rehearsal day put in place by one production which returned to shooting very soon after the government lifted restrictions. This was to primarily check the coronavirus protocols put in place would be effective, but also meant other aspects of the shoot ran more effectively as a result of this dry run.

More generally, a greater sense of precision of "what is going to happen when" was also mentioned as a direct result of coronavirus planning. More specific examples given included being able to remove the queuing system for lunch by introducing an online ordering system as well as moving to a paperless call sheet process.

From a regional perspective, it was hoped by one interviewee that going forward productions would continue to do more to hire locally. This has been a positive outcome for regional and national crew, as productions have needed to try and cut down on people traveling due to Covid and look more to the local workforce.

Remote working

Remote working was raised almost universally by interviewees, but there was a mixed reaction to it and its benefit to the production and, specifically, the creative process.

Interviewees see the benefits of home and remote working as mainly allowing crew to work more flexibly and not to have to spend long days on set when it is not absolutely critical to the production process. Accountants and some of those in the production office were most mentioned as being 'remote-working-ready'. Remote editing was also mentioned frequently as a feasible option as well as a way of reducing the cost of hiring editing space with the right level of IT equipment available.

Generally, reducing the number of people who needed to be on set or on site was seen as a good thing and remote working was suggested as a way to create more respect for colleagues by having a better understanding of their personal situation and home life set up.

Whilst remote working has clear benefits for the individual, it appeared to be less beneficial to the production. This point emerged for a range of reasons:

"Without human interaction, the dynamics of production have been less smooth."

- Line producer

The creative process

Creativity is felt to work best when people are physically together - an example of this could be a script read-through where delays and buffering with video calls impaired the experience and could result in a loss of confidence in the script.

Communication

The informal, side conversations do not happen as much with remote working. This informal style of communication is how the industry operates and can be very useful in nipping issues in the bud and alleviating bigger issues developing down the line.

Equally, video calls do not allow for the full range of communication and can result in misinterpretation and misunderstanding.

Other new ways of remote and virtual working mentioned included a virtual recce of a location, therefore reducing the time and travel to physically carry out a recce. This appeared semi-successful where it was trialled, the downside being that there could be 'glaring holes' in a location when there aren't people on the ground to see it from every angle.

An important point raised was whether the more positive practices arising from the pandemic would be sustained into more normal times or whether productions would flip back to working practices from the pre-coronavirus days.

Online training

Whilst face-to-face training is seen to be the most effective way to train the workforce, 2020/21 has seen a rapid pivot towards online training in order for training providers to keep their services open through periods of lockdown and other coronavirus restrictions.

Online training formats have been highly successful - both from a training provider perspective and from those being trained. Training providers have seen a high level of uptake of online training programmes although success is not limited to the number of people taking training opportunities but also includes the fact that training providers say they have been able to reach people they have never reached through more traditional, face-to-face training methods. Online training also allows often limited training budgets to be stretched further and achieve more bang-for-buck.

One feature of online training is that a much wider pool of talent can be used to provide the training. Without the need and cost of travel, accommodation and expenses, training providers can bring in a wider range of highly experienced professionals much more easily and for shorter stints of training time.

For crew, online methods have removed or reduced travel time and cost which has allowed training to become much more feasible. It has also allowed crew to take up training in areas they might not previously have done, eg in areas of mental wellbeing and softer skills, particularly during the first UK lockdown period where production work was paused.

Online methods are seen to be improving all the time and are very likely to be a more standard way of delivering training into the future. Even where the subject matter appears to require much more hands-on learning, online can be effective. One example given was an afro-hair texture training course which was completed successfully with training materials being sent out beforehand.

One drawback of online training methods suggested by one participant is that, compared with face-to-face formats, trainers are less certain that people have come away with the information and knowledge they need.

A call from industry to tackle off-screen D&I

The challenge for the industry in terms of improving its off-screen diversity and inclusion appeared to be fully understood by research participants:

"It's a huge, huge challenge that we're only just scratching the surface of."

- Line producer

"My main concern is the lack of HETV crew from low-income backgrounds, Black and Asian backgrounds and with disabilities. The barriers to entry and elevation are extreme."

- Producer

Compared with previous iterations of research, there has been a notable increase in 2020/21 the number of conversations with interviewees which highlight the need to tackle the lack of off-screen diversity and inclusion within the industry.

Interviewees show much more determination to solve the problem but would welcome support in order to achieve what needs to be done. Looking at the issue on a short-term, more day-by-day basis, recruiting inclusively is a challenge when recruiting at all is a challenge given shortages in key grades:

"The crews are not diverse and do not reflect the mix across the whole of the UK. We all tend to work with people who we have worked with before, so it is very difficult for those who are starting out in their careers to get experience. As prep time is so short, those crewing up cannot take the risk of trying new people."

- Producer

"It's not what line producer you want to work with, it's who's available. Then, if you add into that venn diagram what line producer is available and is diverse then it's even smaller, and that goes for all crew members pretty much."

- Production executive

But the shortage of crew from under-represented groups is an issue which goes well beyond the overall skills shortage issue, described very well by one interviewee:

"I'm mixed race and I'm a woman in an industry that is very dominated by white men and I really like working with a diverse group of people because it makes for the best team... Everyone at the top - those who control the money - is a white man and they're quite risk-averse and they want people who have experience ...Without being given the opportunity, you can't get the experience."

- Line producer

Of course, diversity relates not only to ethnicity but to a range of characteristics. Solving the lack of diversity and inclusion would arguably be best achieved by also solving the overall shortage of crew - widening the whole crew base and in doing so broadening its level of diversity:

"In HETV, there is quite a small circle of people that everyone goes to and that's not necessarily a good thing. It would be better to have a larger pool of people and then we would have a more diverse pool of people, but how we get to that I'm not quite sure."

- Production manager

Support is required

Productions say they need more support, more resources and tools and more time to prep and crew up in order to deliver a more inclusive crew. There are difficulties in achieving this from a practical perspective.

Interviewees find it most difficult to find mid-level and HoDs from under-represented groups compared to new entrants and trainees. There was discussion within interviews about why talent from under-represented groups has not risen to more senior roles more readily but no real consensus view. The HETV Fast Track Programme will be a positive intervention to support this.

It seems likely that crew from under-represented groups face many more challenges than their industry peers to rising through the ranks. Again, the HETV Fast Track Programme will be a positive intervention to support this.

The need for leadership

"It needs all of these ramshackle things that are cropping up to be brought together. It's too disparate."

- Line producer

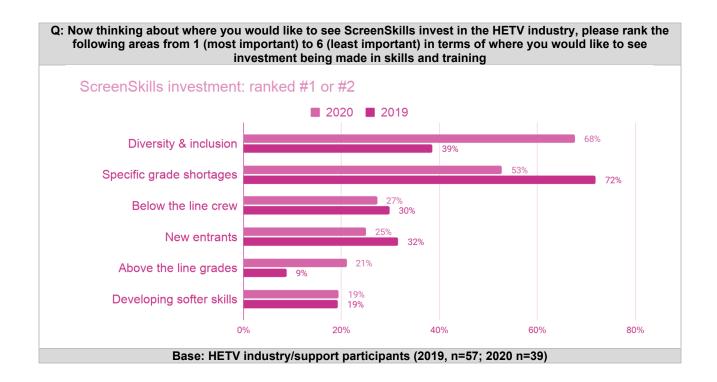
There were issues raised by interviewees around the piecemeal nature across the industry of current efforts to promote inclusion with many organisations running programmes targeted at those from Black, Asian and minority ethnic backgrounds. ScreenSkills aims to embed inclusion in everything it does.

"If the reality is that there are too many white middle-class men in film and TV drama and that it needs to better represent the world we are making drama about, then there is an issue to be addressed but it's going to take time. ScreenSkills should absolutely be at the forefront of leading that."

Producer

Clearly, the diversity and inclusion issue runs far wider than just HETV and there is a genuine opportunity for an organisation such as ScreenSkills - which works across the breadth of the screen industries with a remit to improve skills - to take a leadership role in diversity and inclusion, pulling together the many organisations and initiatives to create more impact.

Data from the 2020/21 survey strongly indicates that the HETV industry sees ScreenSkills as a key investor in diversity and inclusion; of all areas of skills and training, 68% said investment in inclusion would be their first or second priority, up from 39% the previous year.

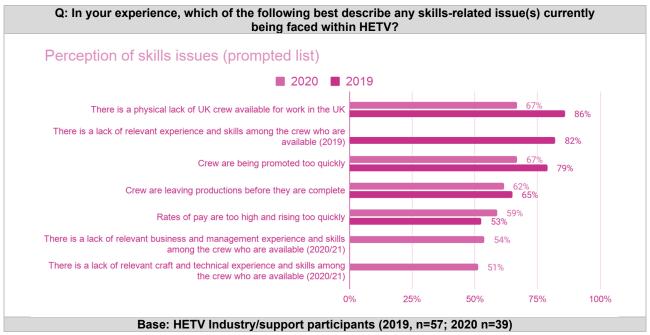


"Even if the only thing ScreenSkills did was to focus on the diversity issue for the next 12 months, that would be time and money well spent."

Commissioning editor

Interviews highlight that the challenge of diversity and inclusion is also one of perception. Individuals who are from under-represented groups may not feel a career in screen is for them. Added to the issues already highlighted, there is a marketing challenge for the industry on increasing genuine access.

Skills-related issues



The overall picture of skills-related issues is clear in 2020/21 in that the key challenges remain a physical lack of UK crew available for work, that crew are being promoted too quickly, crew are leaving productions before they are completed and rates of pay are rising quickly.

However, there is a sense that some of these issues are less pronounced in 2020/21 than in 2019, notably the skills shortage and early promotion of crew. On the other hand, high and increasing rates of pay shows no sign of easing and the level of 'show-jumping', where crew leave productions early for a 'better' job, is constant year on year.

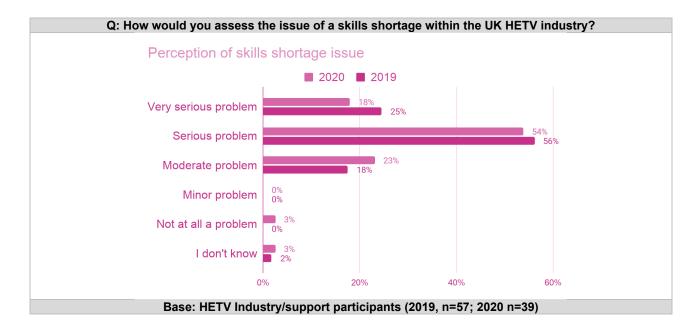
The context of the coronavirus pandemic should be taken into account when interpreting these results. These may be genuine shifts in the data or it could be that the skills-related issues are more muted in the wider context of dealing with a global pandemic. There is also a potential impact from the pause on production work across the first UK lockdown period, although 85% of survey participants claimed they were working on a production at the point of completing the survey.

The survey question about skills gaps was split into two separate options in 2020/21 in order to understand the relative difference between 'business and management' versus 'craft and technical' skills. It would appear the problem with skills gaps is similarly important for both types of skills. The scores for skills gaps are much reduced compared to 2019 but the results are not directly comparable because of a change in question wording. In 2020/21, 74% of survey participants selected either business and management or craft and technical skills as being an issue.

Skills shortages

"Good accountants are impossible to find at the best of times, but when you have a situation like this, everyone can take their pick of jobs and it becomes really difficult to crew up, especially if you don't have lots of money."

- Line producer



There is no doubt, from looking at both the survey responses and analysis of the interviews, that the skills shortage issue remains serious for HETV. In 2020/21, 72% of survey participants claimed it to be a 'very serious or serious problem', down slightly from 81% in 2019 but still felt by the majority to be a definite issue. This was very much voiced by the research participants during their in-depth interview.

HETV productions which sit more toward the lower end in terms of budget - within band 2, for instance - appear to suffer more with crewing up, the lack of availability compounded by this type of production not being able to offer the same rates of pay as those with much higher budgets. The bigger budget projects are setting new expectations for rates of pay. Rates of pay are discussed in more detail later in the report.

"It's a race actually and then you'll find you might book somebody and then they get offered something else."

- Line producer

In terms of the specific grades in short supply, the following list were most frequently cited in 2020/21:

% of survey participants who mention specific grade shortage	2020/21	2019
Production accountant	67%	63%
Location manager	51%	46%
Production coordinator	38%	42%
Production manager	36%	18%
Line producer	28%	40%
1st AD	18%	30%

Producer	18%	19%
Grip	10%	23%
Financial controller	10%	4%
Electrician	10%	11%
Editor	10%	19%
Director	10%	7%
Production designer	10%	-
Script editor	8%	5%
DoP	8%	4%
Production secretary / assistant coordinator	8%	12%
Script supervisor	5%	7%
Make-up designer	5%	-
Colourist	5%	2%
Camera operator	5%	4%
Production accountant assistant	5%	19%
Writer	3%	-
Unit manager	3%	9%
Travel and accommodation coordinator	3%	-
Technician	3%	2%
Technical assistant	3%	-
Supervising art director	3%	2%
Standby carpenter	3%	2%
Set decorator	3%	9%
Rigger	3%	5%
Production buyer	3%	-
Location coordinator	3%	-
Intimacy coordinator	3%	-
Gaffer	3%	7%
Covid/health and safety supervisor	3%	-
Covid supervisor	3%	-

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Covid manager	3%	-	
Costume designer	3%	5%	
Block producer	3%	-	
Assistant editor	3%	5%	
Art director	3%	5%	
Art department coordinator	3%	1	
Second AD	3%	12%	
Base: HETV Industry/support participants (2019, n=57; 2020 n=39)			

Overall, these grade shortages are very similar to those found in 2019 (and previous years). There has been relatively little movement in the data, except for the following observations:

- Production managers are more scarce in 2019/20, perhaps due to some movement into Covid-related roles to manage the pandemic.
- There has been an improvement in the availability of line producers, although they are still
 within the top five grade shortages. There's a similar improvement in the relative availability
 of first assistant directors and grips.

New grades have also been mentioned in conversation and within the survey data. In addition to those already mentioned within the report relating to Covid management and VFX, there are:

- Block producer
- Production supervisor
- Supervising location manager
- Intimacy coordinator
- Qtake operator
- Assistant unit manager
- More coordinator roles within departments, eg costume coordinator, locations coordinator, art department coordinator, clearance coordinator

These additional roles reflect the increasing complexity and scale of HETV production work.

Part of the story around shortages is the question of risk-taking. It is felt that as the industry grows in size and complexity, decision-makers are less willing to take risks, preferring to work with trusted and safe pairs of hands. This seems particularly true when hiring HoDs and often negatively affects those based in a region or nation who may be less well-known.

Skills gaps

"The currency in film and TV work is experience."

Production executive

The data collected as to the seriousness of the skills gap issue presents a different story from that of skills shortages. In 2020/21, 49% of survey participants suggested the skills gap issue was 'very serious' or 'serious'. This is better than the 65% figure in 2019.

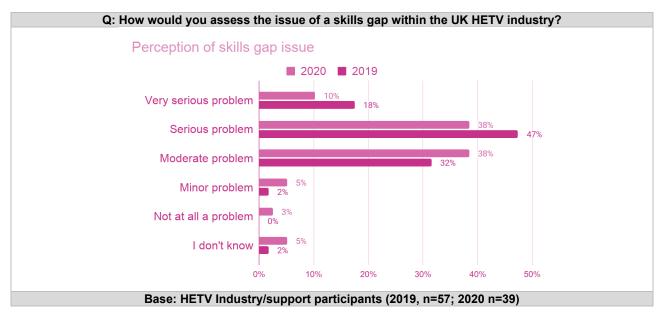
Issues identified in previous rounds of research are still mentioned, albeit perhaps less strongly than the skills shortage issue.

"We finding we're stepping people up a lot sooner than maybe they're ready for...because we have to...It can be really unfair on those people if they're not ready for it."

- Production manager

Driving the skills gap issue is the problem with crew stepping up, or being stepped up, too early and before they have garnered the requisite level of experience. Whilst this issue is not as severe a problem in 2020/21 – cited by 67% of respondents against 79% in 2019 - it remains an issue for a large majority of participants.

The experience of working in a specific grade can be very different from one production to the next, given that individual productions will vary widely in the way they operate, how they are led and which challenges arise. For this reason, it is very much felt that crew need to establish their experience in a given grade across a number of productions and not just one or two before moving up.



Although the skills gap issue is not as acute as in 2019, there are consistently high scores for specific skills seen to be lacking within the workforce. These are notably:

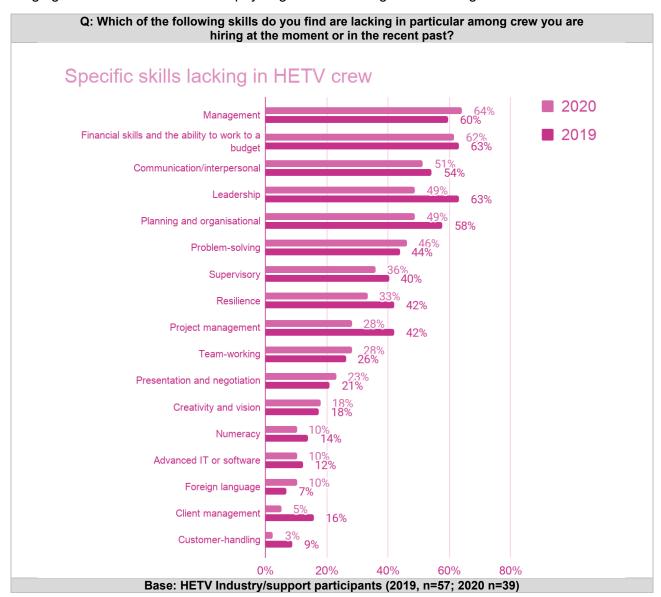
- Management skills
- Financial skills and the ability to work to a budget
- Communication/interpersonal skills
- Planning and organisational skills
- Leadership skills
- Problem-solving skills

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It should be noted that for leadership skills, planning and organisational skills, resilience skills and project management skills, scores have all reduced in 2020/21 compared to 2019, which may be a positive reflection on the management of the coronavirus pandemic.

In an industry very much dependent on its people to deliver successful outcomes in a short time frame, the lack of a specific HR function to support individuals within individual productions is seen as surprising. This point was raised in 2020/21 as it had in previous waves of research.

With the absence of an HR lead or team, the responsibility for this type of work falls upon line producers, heads of production and producers, who are not necessarily equipped with the skills and experiences to cater for the increasingly complex people-related challenges and issues - ranging from contract and rates of pay negotiations through to wellbeing and mental health.



Dealing with skills shortages and gaps

On a production by production basis, those responsible for crewing up continue to do their best to find ways to make the production work. In 2020/21, the ways of coping have been similar to those highlighted in previous years, for example:

Longer prep time

Needing to spend longer on setting up a production in the lead up to shooting, aiming to secure key crew members more in advance.

Paying retainers

Where certain key crew are needed but in danger of being lost to other productions, retainers might be paid. This has felt to be particularly important during the coronavirus pandemic.

Compromise

Sometimes a production has no choice but to take on someone who is far from their first choice. To reduce the risk around this person, more support is put in place around them, for instance by hiring an additional production coordinator to help support a more inexperienced production manager. Clearly this means compromise can affect budgets. Another example given was where a production manager could not be found so this role was shared between line producer and production coordinator, who were simply required to make things work.

Being flexible

Providing a more flexible working arrangement, for example, for a working mother who needs to collect children from school, were given as examples of workable solutions but this was very much in the minority of interviews.

