Sizing Up: Workforce Composition and Capacity in the Screen Industries

An Ampere Analysis report for ScreenSkills and 4Skills

April 2025

Foreword from ScreenSkills, 4Skills and Ampere Analysis

Laura Mansfield
Chief Executive Officer, ScreenSkills

The screen industries are one of the UK's great success stories – admired around the world for their creativity, technical excellence and ability to tell powerful stories. But success can't be taken for granted. The last few years have been marked by uncertainty - for productions, for employers and for those trying to build or sustain a career behind the camera.

ScreenSkills knows that research matters – and this study, commissioned with 4Skills and carried out by Ampere Analysis, is the most detailed picture yet of the people who make up the UK's screen production workforce. It is the foundational step to ensure our approach to building a sustainable skills pipeline is data-driven: to understand how to make the best interventions, and to better guide future research, we need to understand the size of the workforce – who and how many people are working, in which sector, and whereabouts.

For the first time, this study, which brings together hard data and lived experience, gives the industry real insight into supply and demand issues by department and sub-sector – meaning we can better quantify the granular pinch-points in the industry. For example, the report goes some way to mapping the size of the industry by region and identifying specific local issues with reference to the national picture. It will also help to guide future research projects by giving us a useful baseline of the opportunities and challenges facing the sector today.

From training and career development to diversity and workforce mobility, the findings offer a strong foundation for action – for ScreenSkills, for employers, for policymakers and for anyone working to ensure the UK remains a global centre of production.

We're grateful to everyone who shared their insights and to our partners at 4Skills and Ampere. Together we can make sure the industry is not only successful, but fair, inclusive and sustainable for the long term.

Richard Broughton
Executive Director, Ampere Analysis

Andrew Killeen
Principal Consultant, Ampere Analysis

The UK production market has been through a tumultuous half decade. COVID-19 disrupted production from 2020. Global streamers drove significant growth in commissioning activity 2021 and 2022. 2023 and 2024 saw challenges in both the UK and global economy combined with the aftershocks of the Hollywood strikes.

Such volatile market conditions create unpredictability. Both for companies operating in the sector, and individuals looking to build their careers in the industry. In this context, timely data and insight is crucial for understanding where support should be best placed. This pilot report aims to provide such clarity, combining large-scale data gathering and modelling with in-depth industry and workforce interviews to create what we believe is the most comprehensive study on UK film and TV workforce dynamics to-date.

We would like to thank ScreenSkills and 4Skills for engaging us to produce this crucial piece of research and those working in and around the industry who generously contributed their time through interviews in support of the project. We hope that the insights and information contained within this study prove a valuable resource for the industry in supporting decisions around training, DEI and sector policy.

Foreword from ScreenSkills, 4Skills and Ampere Analysis

Kevin Blacoe

Head of Partnership and Skills, Channel 4

At 4Skills we believe that it's vital to create opportunities for people from a wide range of backgrounds to pursue successful, sustainable and exciting careers in our industry – that's why we're investing £10m per year in training and skills, with a particular focus on the Nations and Regions.

We want our investment to be evidence-based and focused on the areas where we can have greatest impact. That's why we we're really keen to work with ScreenSkills and Ampere on this study of the UK TV & Film workforce, and it's great to see the outcomes of this partnership.

The themes and findings set out in this report will inform the continuing development of our slate of 4Skills projects and initiatives. The skills gaps at mid and senior levels, the focus on career progression and the importance of business and leadership skills are all particular areas that we are prioritising at 4Skills.

Critically though, we want this report to be of value to the whole TV and Film sector. We know that it will help shape the strategy and priorities for ScreenSkills. But we would encourage everybody who has a stake in our industry – broadcasters, studios, streamers, producers and all the workforce – to consider how it could inform their own work and help support the development of the amazing talent in our sector.

Executive summary

There are nearly 200,000 people working in film and television production in the UK but with recent declines in utilisation across roles in a number of departments. The workforce has clear need for role-specific technical skills, certain workers require transferable skills, and industry initiatives are key to ensuring recent gains in DEI are not lost to risk-averse hiring strategies

ScreenSkills & 4Skills engaged Ampere to create a pilot study to size and profile the film & TV crew workforce

ScreenSkills and 4Skills have partnered with Ampere Analysis to create a comprehensive modelling framework that quantifies and profiles the UK screen industry's workforce by department, seniority, sub-sector, and demographic characteristics. This new approach leverages published crew data to refine previous estimation methods, enable detailed workforce segmentation, and is designed for easy updates to support ongoing industry monitoring.

Methodology

Workforce modelling	Workforce survey	Producer interviews
5842 released film / TV titles with published crew data, including titles produced or financed in the UK over 2022-2024 that have not, or are yet to qualify as British by the British Film Institute (BFI)	B2B and B2C surveys to support completeness of data, and add further nuance and detail	
	An online survey of the workforce was used to understand activity across 1083 respondents between Oct. – Nov. 2024	30 production companies were interviewed for qualitative insights supporting the research
Each title has been matched on 3rd party databases to collect crew data – producing a dataset of a crew workforce of 543,673 credited roles	Final results were weighted and benchmarked against published industry demographics, including CDN Diamond	Recruitment ensured coverage of production, post-production and VFX/animation, content type and region

Additional workforce estimates for upcoming releases, content currently in production and for under-credited roles, the ancillary workforce and titles with no published crew data, drawing on survey and interview inputs to extrapolate activity over time

**Ampere's Commissioning product tracks global content production and commissioning trends, and Ampere's Analytics - Cross Platform product tracks film & TV content across SVoD, AVoD and TV services*

Executive summary: Skills gaps & DEI are key challenges amid the industry downturn

Volatility in the UK television industry has driven a series of workforce-related challenges. The growth in the volume of projects in 2021 and 2022 drove high demand for screen workers, resulting in a rapid expansion in the number of people employed in the industry. This expansion drove fast promotion of junior talent, and an influx of new entrants, resulting in skills gaps. Since 2022, economic challenges, the effects of the Hollywood strikes, and a cut-back in streamer commissioning, have reversed much of this growth. The 200,000-strong workforce is now under-employed, with many struggling to find roles. This downturn is being felt particularly keenly at junior to mid levels, with particular implications for DEI. Skills and training initiatives focusing on retention of junior workers will be key to ensuring that DEI gains from the last few years are not reversed by junior workers leaving the sector.

While an underutilized workforce might theoretically offer producers their choice of candidates for roles, in reality skills gaps persist. This is a result of two factors. The first is that the rapid promotions and workforce expansion in 2022 has led to a broadened workforce with on-paper experience, but gaps in their practical knowledge. The second is that a high degree of specialization from the workforce means certain genres and content types may still be encountering high workforce demand – for instance high budget scripted TV. Closing role-specific technical skills gaps (i.e. those skills core for each individual role) would help to meet industry desires for a more capable workforce, and support workers in their desire for career advancement. Transferable skills training would also support a greater degree of workforce mobility, which may help to alleviate workforce pressures in high demand areas, as well as offering those struggling to find work a greater range of potential roles.

Many of the pressures and challenges faced by the industry were reflected in the workforce survey to a comparable degree across London and the Regions & Nations. However, each local screen industry has specific challenges. The South West workforce faces particular retention issues stemming from low demand for unscripted projects, as does Scotland. London is seeing pressure on VFX and craft roles, but ongoing post-production skills needs. The North East, North West and Yorkshire have a proportionally greater need for upskilling of workers in technical roles – as does the Midlands. Producers in the Regions & Nations also face different DEI challenges to those in London – potentially requiring producers to trade-off hiring locally or widening their geographic recruiting pool to support the recruitment of diverse talent. Clear, centralized DEI guidance, tailored to each area, would help producers across the UK manage balancing DEI goals with local hiring initiatives.

Key findings: Size, capacity, location of the UK workforce

In 2024, the UK screen workforce was nearly 200,000 strong. Technical, production management, editorial and craft departments are responsible for roughly half of individuals active in the sector. VFX and post-production specialists also account for a large number of individuals active in the sector. Large-scale films have been the single biggest contributor to employment in the past few years, followed by unscripted TV shows.

Retention of workers is now an issue, with junior workers more likely to be considering shifting out of the industry**.** The workforce survey found that:

- **72% of respondents have extra capacity for work**, particularly among junior roles (82%)
- 33% of workforce respondents were dissatisfied with their career progress over the last year
- **65% of non-permanent employees found it difficult to secure new roles** on productions over the last twelve months

However, the volume of film and TV titles in the pipeline is currently the lowest it has been since 2020 – with unscripted TV seeing heavy declines from peak. Cut-backs in projects have led to **the UK screen workforce being at just 60% of capacity**, by Ampere's estimates. Declines in large-scale film production have contributed to particular shortages of roles in the VFX and animation departments – but almost every department is now underutilised, with newer/entry-level crew particularly disadvantaged by this trend.

London is the largest regional contributor to employment in the sector, responsible for an estimated ~80,000 individuals. However ~60% of the UK's screen workforce is based outside London. The largest regional contributors are the South East of England (>20,000 individuals), Scotland and the North West of England (each responsible for 10,000-16,000). **Workers in the UK Regions are twice as likely to travel domestically for productions (53%) vs London (26%) and the Nations (27%), highlighting local skills gaps.**

Key findings: Skills gaps and training needs of the UK workforce

During the post-pandemic commissioning boom, the industry was forced to prioritise rapid hiring and career progression, over training, skills and experience development, to meet the production demand. This resulted in skills gaps impacting the overall workforce quality. These **skills gaps from the commissioning boom persist, despite the industry being in a downturn, and the workforce underutilized**.

The workforce survey also indicated demand for pitching skills. Inward investments accounted for 85% of UK production spend on film and HETV and the international groups driving this spend have different production processes, priorities and requirements to domestic UK commissioners. **Training in pitching, leadership and creativity & vision may further support the competitiveness of the UK production sector** on an international scale – particularly key for growth in the production market given the budgetary pressures being felt by domestic commissioners.

Role-specific skills training is an area of high demand among workers, but industry interviews now highlight the **limited on-the-job training opportunities for new entrants**. This compounds the challenges for those new to the workforce. The limited number of new roles has driven high competition among the workforce for these roles, and limited training opportunities means that new entrants struggle to demonstrate to employers that they have the skills necessary for those positions.

Emphasis on different skills will be necessary in different regions, according to local supply & demand pressures. Regions which are more reliant on scripted projects – such as the North West, North East and Yorkshire – are likely to have proportionally greater need for Technical role training. While areas under stress from the recent fall in unscripted commissioning, such as the South West and Scotland, may require focused skills support to support workforce retention

Key findings: DEI in the UK screen industry

The sector faces regional, departmental and budgetary challenges in the drive to improve DEI. While research highlighted the positive impact of DEI measures and improving diversity metrics, analysis reveals that **most of the DEI gains have occurred at junior levels of the industry**. Given worker oversupply, producers may opt to rely on known crew over recruiting new local or diverse talent, risking undermining recent industry gains. Supporting the retention and progression of junior workforces is key for maintaining DEI momentum.

Social Mobility is a challenge within the sector – with 61% of respondents to the workforce survey coming from professional households, and only 31% from low- or working-class backgrounds. The workforce in London and those in the editorial and post-production departments were the most heavily skewed towards these professional households. Post-production had the highest proportion of workers from non-paid school backgrounds.

Gender representation was reported through industry interviews to be improving, but workforce survey data indicates that senior roles still skew towards men – with 62% of male respondents in senior positions compared to 47% of women. Further, interviewees highlighted the gender imbalance across departments, noting it leads producers to manage gender diversity in totality across departments rather than within each department, suggesting initiatives driving DEI may need to be more finely targeted at specific departments

Nations & Regions face different DEI challenges to London – potentially requiring producers to trade-off hiring locally or recruiting diverse talent elsewhere. The industry can support producers' DEI efforts by providing **clearer, centralized guidance tailored to regions and production categories**. Expanding initiatives such as access coordinators and on-the-job training programmes would further aid achieving meaningful inclusion.

Ampere's Recommendations for further research

Further work needs to be done to improve data collection and reporting across the UK in order to analyse the local, regional and transitory workforces. While there are pockets of data and research held in some regions, a more comprehensive framework is required. This may include regional tracking of the relevant locations for each production and the associated cast and crew, in order to more comprehensively map the production workforce and its location. This would enable the industry to then distinctly analyse the workforce from a geographical standpoint, allowing for more detailed analysis of geo-specific pressures on both the workforce, and on producers.

Future studies replicating the approach pioneered by this study will allow for ongoing tracking of the size and scale of the workforce, and support training and policy initiatives. A powerful extension would be the addition of demand forecasting for the workforce. By considering the relationship between the production landscape and the health of commissioners and other key funding pools, future demand estimates for categories of titles and the associated workforce can be generated. This would support producers, policy makers, industry bodies, and other screen sector stakeholders to better plan for the near-term future. This may allow stakeholders to then anticipate future pinch points for the workforce, and target or adjust training and support regimes appropriately.

National, regional or local screen agencies' may wish to commission targeted research into local workforce demographics to better understand regional talent variations. This would provide valuable insights to inform more nuanced DEI target-setting for local productions, ensuring efforts are reflective of the local workforce and its diversity. ScreenSkills may be well placed to engage national and regional bodies to develop a consistent centralized mechanism for such research.

Introduction

This pilot study aims to provide a comprehensive view of the UK film & TV screen workforce, supporting decision-making & policy recommendations around the skills & training vital for the ongoing success of the UK screen sector

This study provides a foundation of data for future research on the UK workforce

- The size of the screen industry's crew workforce (i.e. those 'behind the camera') is constantly in flux. Over the last five years there have been numerous challenges that have impacted the workforce: The downturn during the covid pandemic, the booming industry as it recovered and an eventual slowdown which was compounded by strike action. However, there is a lack of data on how many workers left or entered the workforce during these periods and how this has impacted the workforce's ability to service productions.

- This study introduces an innovative methodological approach to give richer quantitative insight into the size and profile of the workforce, reflecting industry calls for a new approach to workforce data. This report demonstrates the scale of supply and demand – and the mismatches between the two – helping trade bodies, employers and policymakers to develop a sustainable and inclusive workforce by highlighting challenges relating to utilisation of the workforce, skills needs and demographic data. Both supply (the workforce) and demand (the market) are measured in this study by estimating size and scale of productions and crew within the UK since 2022.

- Previous estimates of the UK's screen industry workforce have ranged between 52,000 and 200,000 based upon varying methodologies and definitions. Understanding the size of the workforce – on a total level, and by department/subsector – is invaluable to help guide skills provision. The most trusted sizing data comes from ONS studies (e.g. the Census); however, ONS segments only by SIC codes which do not provide meaningful data for the industry – and there are further challenges when considering the ability these studies have to capture the number of freelancers working in the sector. Through the segmentation employed in this study, we can better understand the scale of skills challenges by sector and department which will be crucial to making more strategic interventions, highlighting pinch-points and areas of oversupply.

- This study will also help future research into the workforce by providing detailed segmentation data of the screen workforce, and a standardized taxonomy, meaning future studies can put in place quotas and weights – ultimately making future workforce studies more rigorous than in the past. This study is foundational in providing meaningful data to the industry, which can be tracked over time as market and skills needs inevitably shift, and will support improving the quality of future studies across the industry.

Tackling skills, retention & diversity challenges are key to building a more sustainable film & TV workforce

- There are a number of existing efforts to monitor the size and profile of the workforces across the screen industries (see table to the right). However, the broad nature of film & TV production and its overlap with other industries (such as advertising and video games) makes it difficult to create a consistent framework

- This is reflected in existing measures for the UK screen sector, for example:
  - The Office for National Statistics' Standard Industrial Classification (SIC) codes are too broad, with some codes including non-screen sector related activities, and cannot differentiate between production types, international productions and other important details. Further activities may be misaligned to the SIC codes
  - The BFI's Screen Business reports focus on productions that benefit from UK tax relief schemes. This largely covers scripted content, and has no provision for a significant portion of production activity in the UK that does not qualify across the content categories for tax relief

Summary of past, relevant research on the UK screen industry workforce

The **BFI's** Screen Business reports analyse the economic impact of the UK screen industries, covering the GDP contribution, employment levels, and tax revenue generated by screen content supported by the various UK tax reliefs. The BFI also commissioned the UK Crew Mapping and Skills Forecasting Study in 2023 to create a new pilot methodology for mapping crew across the UK production landscape and to forecast skills shortages.
The **UK Screen Alliance** has published numerous studies on the workforce and diversity and inclusion across the industry typically focusing on distinct sub-sectors for the industry (i.e., VFX, animation and post-production).
The **Film and TV Charity** has published multiple research studies focused on understanding the challenges, needs, and well-being of the UK film and TV workforce, including the Looking Glass Survey 2024 and Understanding loneliness behind the scenes in film and TV, emphasizing workforce retention, mental health, diversity, and working conditions.
ScreenSkills publishes research focused on skills gaps, training needs, workforce development, and inclusion within the UK screen industries to support policy development, training initiatives, and strategies for workforce sustainability. This research has included skills reviews, the impact of targeted training programmes, and diversity and inclusion assessments, as well as annual HETV workforce research.
The **Producers Alliance for Cinema and Television (PACT)** works on behalf of the independent production community, publishing census-based financial information and industry trends as well as promoting a range of tools and resources for industry skills, and diversity and inclusion.
The **Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU)** is a union representing non-performance roles in broadcasting, film and cinema and independent production, among other creative industries. BECTU studies often cover workforce conditions and worker rights.
The **Creative Diversity Network (CDN)** promotes diversity and inclusion within the UK television industry through 'Diamond', which collects and analyses data on diversity across productions from major UK commissioners.
Creative PEC (Creative Industries Policy and Evidence Centre) is an independent research hub that delivers authoritative evidence and policy recommendations to support the UK's creative industries. Its research on skills issues has identified critical gaps in workforce training, education, and development.

This report details Ampere's pilot study to develop a framework to size the UK screen industry's workforce

- ScreenSkills and 4Skills have commissioned Ampere Analysis to develop a modelling framework to size (in terms of the number of individuals) and profile (in terms of department, seniority, sub-sectors and demographics) the UK workforce involved with the screen industries.
- This framework has been designed to leverage published crew data to improve upon previous methods used to estimate the size of the UK workforce, allow for segmentation of the workforce, and – ideally – should be straightforward to update for future industry monitoring
- This report represents the first iteration of the modelling framework, focusing on the film & TV sector. The primary objectives of this pilot study include:
  - Estimating the size of the UK film & TV crew workforce
  - Exploring the workforce profile, in terms of sub-sector, department, seniority, regionality, and demographics
  - Identifying supply/demand and training issues relating to particular skillsets or production departments
- The table on the right outlines the structure and contents of this report

Report structure and contents

- **Introduction**
  - This section outlines the structure and contents of the report and prior relevant research on the film & TV workforce
- **Methodology overview** describes Ampere's methodology, combining detailed bottom-up modelling of the UK screen workforce underpinned by crew information collected from ~6000 UK productions, with novel primary research – including a survey of the UK workforce and interviews with production and post-production companies
- **Size of the UK crew workforce** details the size of the UK film & TV workforce. This section draws on Ampere's crew workforce modelling and interviews with production companies. This aims to answer the following:
  - How big is the screen sector workforce?
  - How busy is the workforce?
  - Which sectors do the workforce work between?
  - What are the industry's training objectives?
- **Profile of the UK crew workforce** estimates the demographic breakdown of the industry to monitor DEI efforts. This aims to answer the following:
  - What is the diversity profile of the workforce?
  - Where do people live and work?
- **Findings & recommendations** summarises the key findings and recommendations towards building a world-leading, inclusive and agile workforce for the UK TV & film production sector
- **Annex: Crew workforce modelling methodology** provides additional detail on the process used to estimate the size of the workforce, illustrating sources and assumptions
- **Glossary of terms** explains the definitions and categories used in the report – including the production types and role categories used in modelling and reporting

Methodology overview

The study relies on a three-pronged approach, combining large-scale data collation and modelling, industry interviews with a representative array of firms, and a workforce survey to understand the perspectives of individuals working in the sector

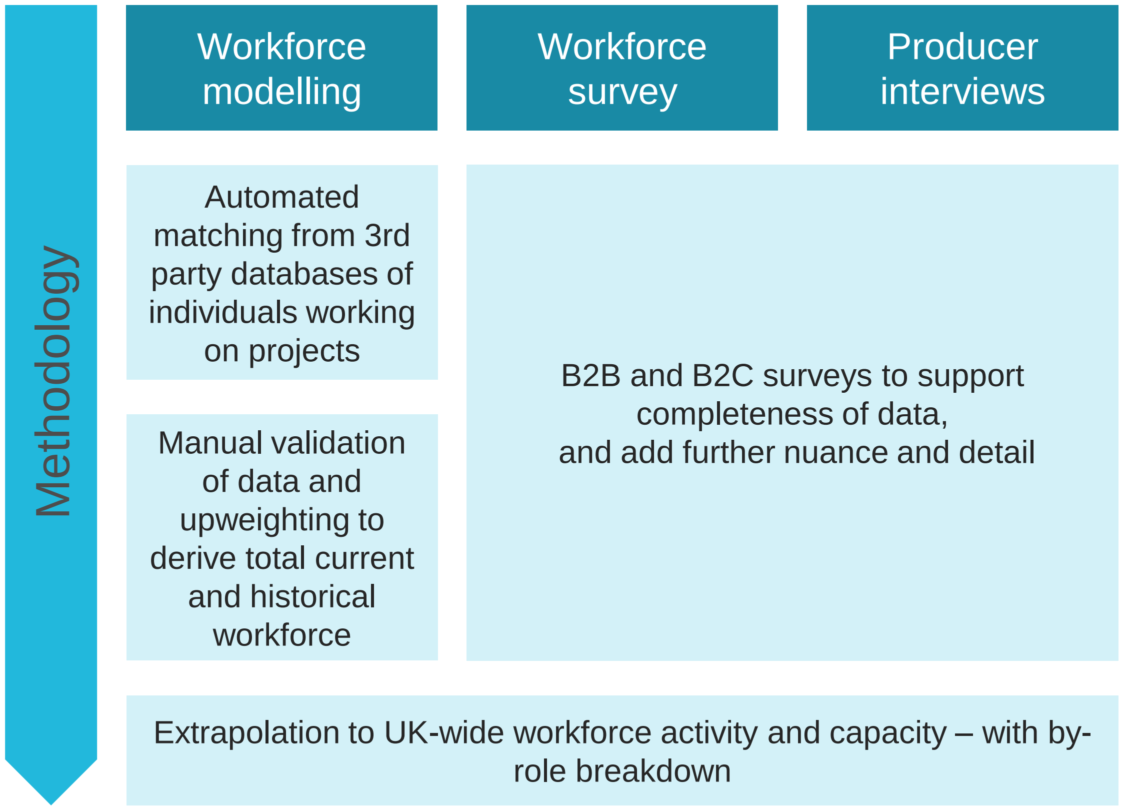
This section details Ampere's methodology, combining workforce modelling and primary research

- This study features a detailed, bottom-up model of the UK screen workforce, underpinned by extensive existing research, novel primary research – including a survey of the UK workforce and interviews with production, post-production and VFX/animation companies – and gathering the latest industry data

- This data collection builds on Ampere's continuous tracking of the UK production landscape, matched against published industry cast & crew data. Workforce modelling has then been used to estimate the number of under-credited roles, the ancillary workforce and titles with no published crew data, and to extrapolate activity over time by department and industry sub-sector. This modelling process includes:
  - Deriving the number of active film and TV projects in the UK in any given month/year, based on commissioning activity and release dates
  - Matching crew information to each title from published industry data
  - Normalisation and recategorization of staffing roles into a systematic taxonomy
  - Extrapolation of UK-wide workforce activity and capacity by role
  - Illustration of areas of skills shortages or oversupply

- The B2B and B2C primary research has included a workforce survey and producer interviews in parallel to inform the above modelling process, provide insight into both the quantitative and qualitative factors influencing supply and demand in the sector, and support the development of conclusions around how interventions and training programmes can best support the UK screen sector

Overall methodology



Modelling: Ampere has extrapolated the crew workforce from credited roles on ~10,000 UK productions

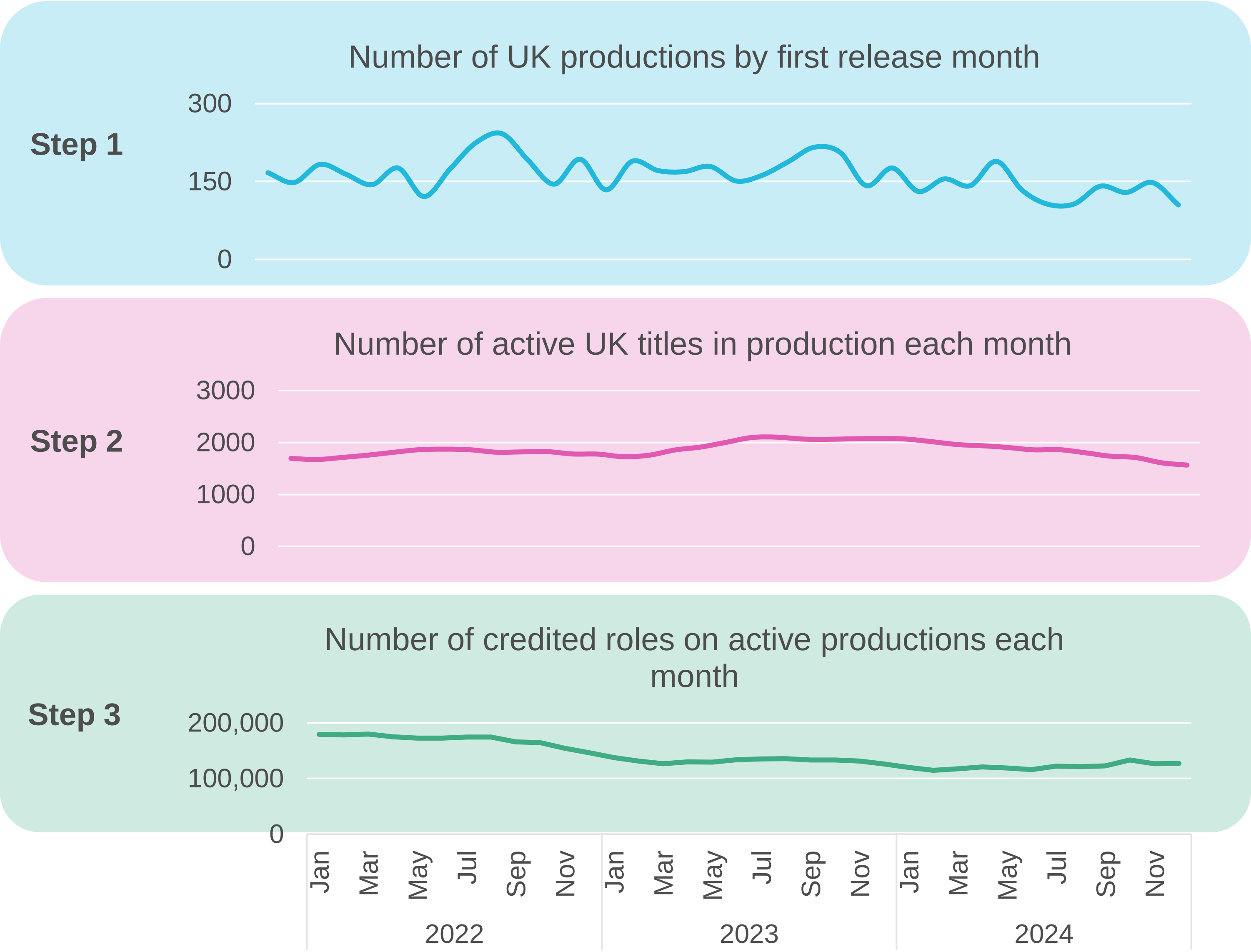
The workforce sizing methodology follows a three-step approach:

Step 1: **Identifying relevant UK productions** over 2022–24 using Ampere's Commissioning database as the core source for identifying UK film and TV projects, supplemented by additional public databases to compile a comprehensive list of productions with relevant production activity during this period

Step 2: **Estimating approximate production timelines** using Ampere's tracking of commissioning and release activity for all major broadcasters and content producers

Step 3: **Attaching crew data on a title-level basis.** Crew data from published sources, matched to a standardized role taxonomy, was linked to ~6000 titles

The total workforce estimates across the industry were then extrapolated to the total ~10,000 UK productions (see *Annex: Crew workforce modelling methodology* for details)



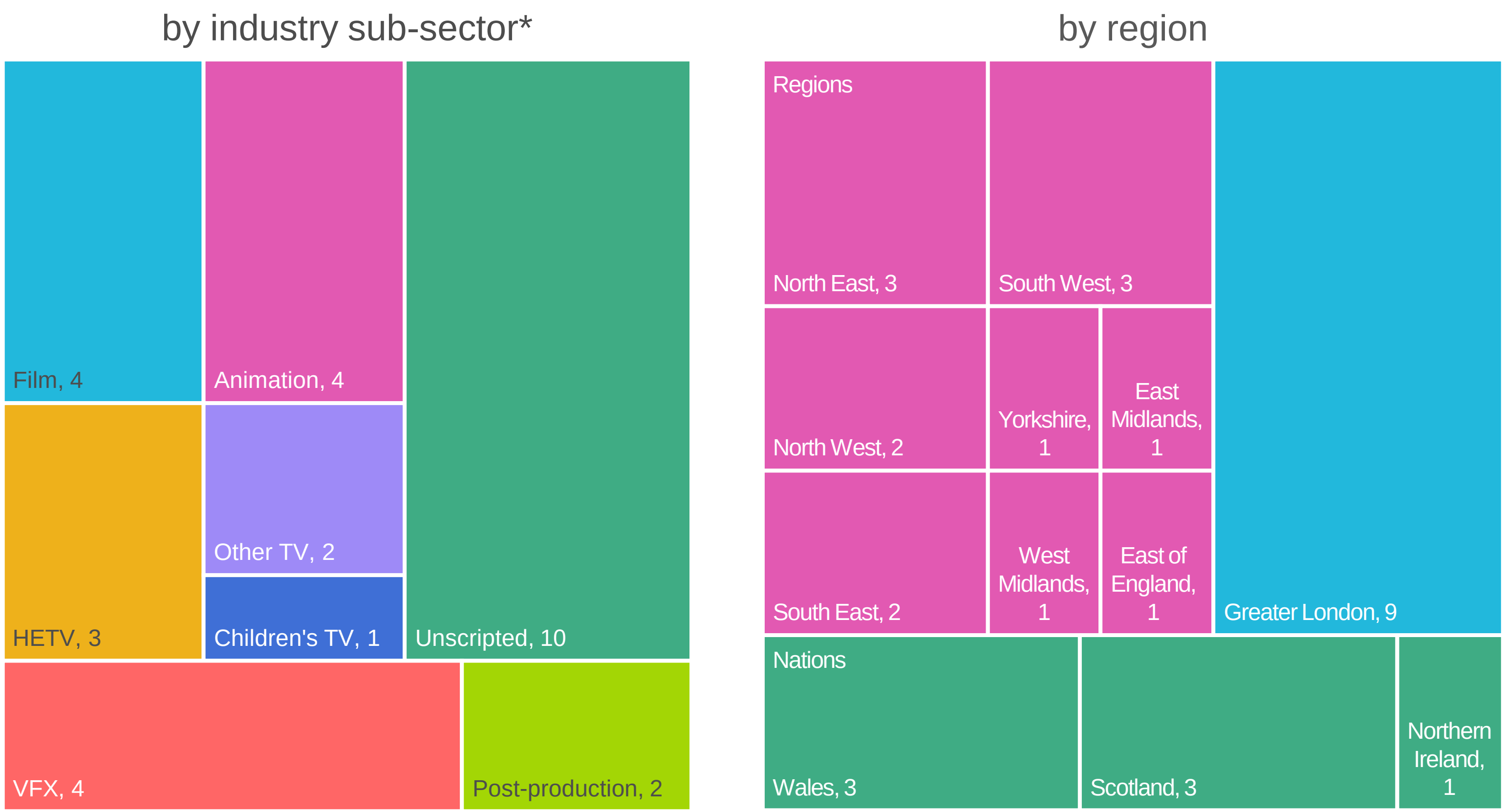
Interviews: 30 production companies were interviewed for qualitative insights supporting the modelling

- As part of this study, Ampere has interviewed 30 production companies to provide insights to support the findings of this report. In particular, interviews provided qualitative insights informing the modelling process on resourcing requirements, activities and shortfalls. The interviews also provided supplementary insights on the availability of skills & training, and challenges across the workforce

- Qualitative insights from these conversations were used throughout Ampere's research across the study, supporting insight into production timelines and the roles involved at each stage of production. This was of particular use in verifying assumptions around production timelines, and for supporting modelling assumptions relating to un- or under-credited workforces. Insights on market dynamics were also used to verify the findings of the modelling exercise

- Interviewees were recruited primarily through ScreenSkills contacts, ensuring coverage of all major content categories and production regions, illustrated to the right

Number of production companies interviewed



**These categories are based on the primary type of content the interviewees worked on, but many interviewees worked across multiple sub-sectors*

Survey: An online survey, weighted to represent the workforce, provides demographics and career insights

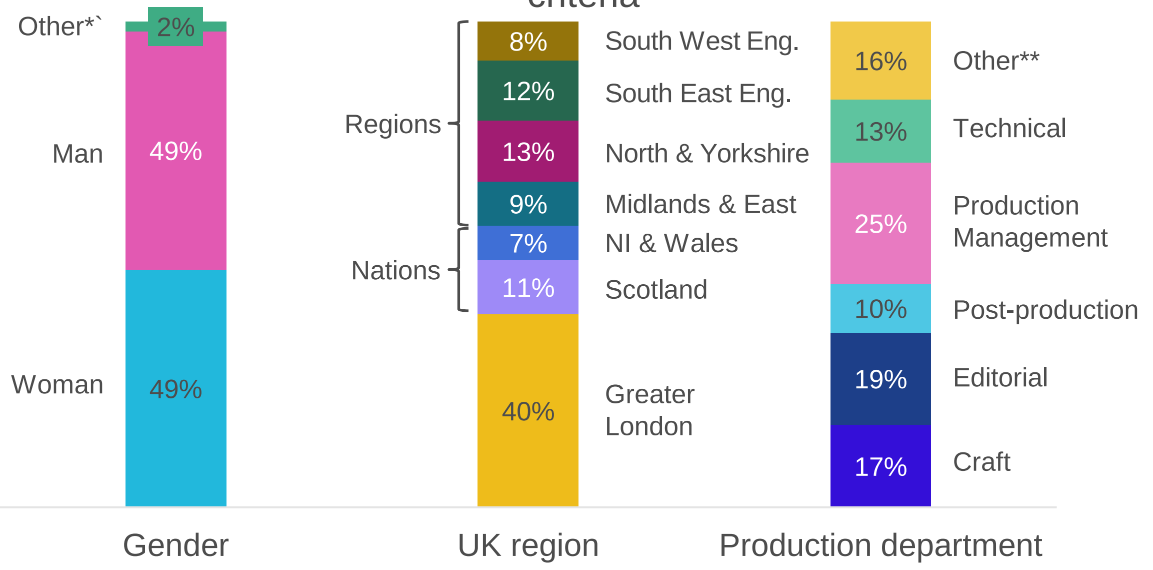
- Ampere conducted an online survey between Oct. – Nov. 2024. Respondents working in the UK film & TV production industry were recruited to quantify their: seniority, tenure in the industry, location and personal demographics, employment profile (i.e. freelance, PAYE), Employment challenges, and career objectives and training requirements

- This survey relied on the natural fallout of respondents recruited across marketing platforms, with a high proportion of contributors drawn from ScreenSkills' beneficiaries. The survey sample totals over 1000 respondents across the UK working directly on film & TV production, and closely resembles the UK population distribution across nations and regions. However, as a pilot study, sub-samples of less than 100 were achieved among some nations & regions, making it unreliable to analyse the results across all distinct nations & regions. As such, the UK nations & regions have been grouped to achieve sufficient sample sizes for this analysis.

- Further, the responses have been weighted to better represent the workforce as closely as possible without overweighting any individual respondents. Weighting has used workforce distributions derived from the ONS SIC codes 58/59/60/62 (gender and UK region), and the crew data by production department as obtained from the modelling and extrapolation component of the study. The final weighted results have then been benchmarked against other published survey data, including CDN Diamond data, and fall within a reasonable margin of variation

- The primary use of the survey was to quantify the workforce demographics across the industry, understand skills gaps and requirements, highlight differences across various sub-segments, and provide further quantitative insight used throughout the modelling

Representation of survey respondents across key criteria



Survey respondents recruited via:

ScreenSkills | pact. | UK SCREEN ALLIANCE in partnership with ANIMATION UK | THE KNOWLEDGE | the AMP

**Other genders include Intersex, non-binary and other self-descriptions. Data rebased to exclude 'Prefer not to say', Workforce total rate = 5%*

***Other departments include animation, development, music, stunts & special effects, VFX, and writing*

N = 1083

Size of the UK crew workforce

The size of the UK film & TV workforce has been estimated at nearly 200,000 individuals active in 2024. But the commissioning downturn has driven a high degree of under-utilisation of the workforce, resulting in a challenging employment environment for many workers.

This section breaks down the estimated workforce size, activity and training objectives

The UK off-screen crew workforce is estimated to comprise 183,000 – 194,000 individuals in 2024. This represents the distinct number of individuals working in the industry on a full- or part-time basis and tallies with other workforce employment estimates of between 50,000 – 200,000 full-time equivalents. The technical, editorial and craft departments represent the largest proportions of the workforce, with large-scale film productions driving ~55% of the workforce. The overall number of individuals with some degree of employment in the screen sector has been stable since 2022, but utilisation (detailed in the capacity and activity section of this report) has been falling.

The commissioning downturn and shifts in content focus have long-term effects on production cycles, reinforcing the need for workforce adaptability. UK commissioning dropped by 18% in 2024 relative to the post-COVID boom in 2022, and is now at the lowest level of new orders since 2020. Unscripted orders surged by 36% from 2020-2022 but fell dramatically post-peak. Scripted content has remained more stable in volume terms, but has shifted away from larger budget content towards more cost-efficient film & TV projects. These rapid changes in demand from commissioners have created increased competition for jobs in high-growth areas while limiting opportunities for individuals elsewhere.

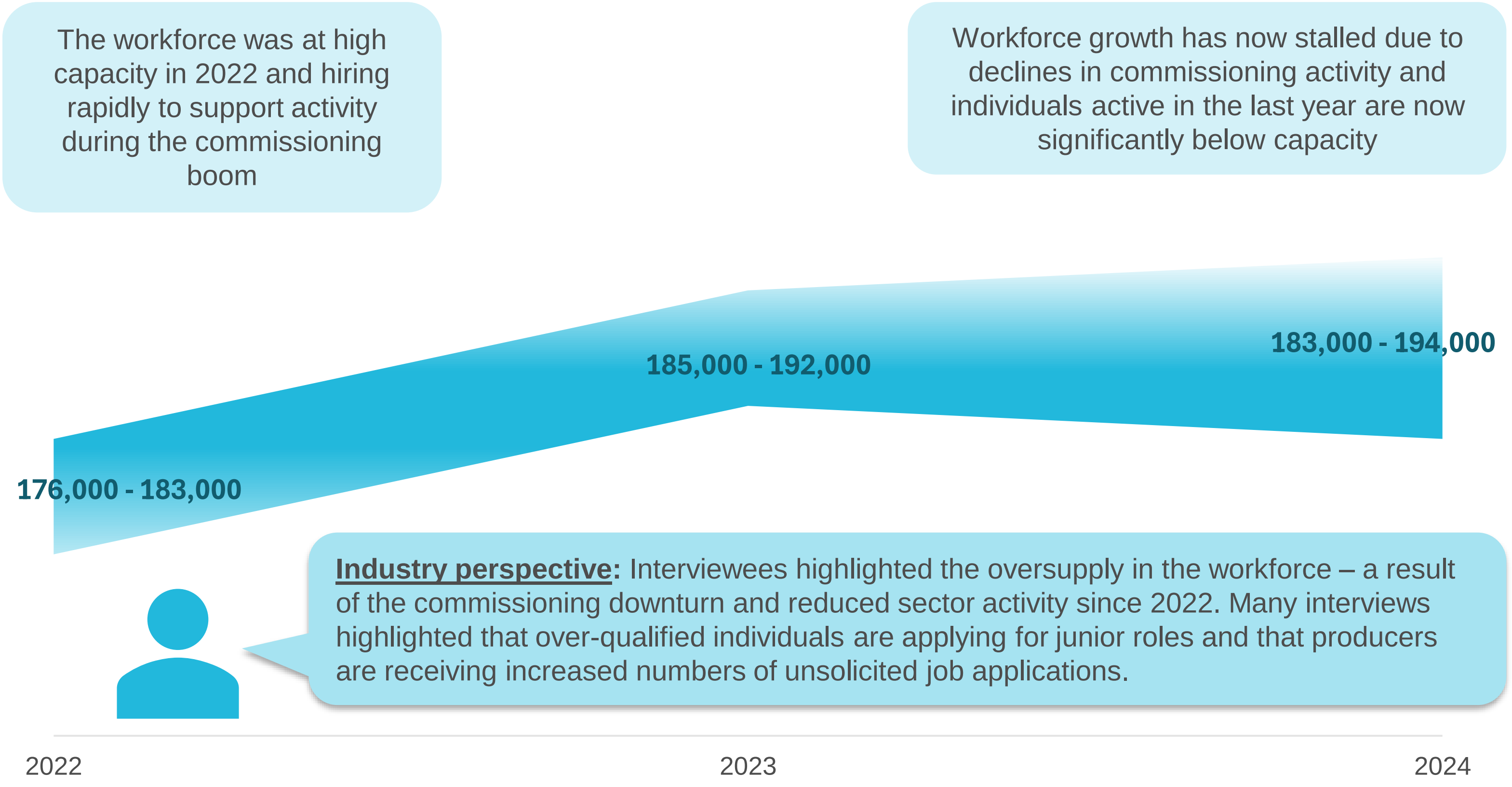
Building workforce resilience through upskilling and adaptability could help those affected by the slowdown in large-scale productions. VFX, animation, and stunts & special effects roles have declined nearly 50% since 2022. Survey data shows widespread under-utilisation, with nearly half of workers—and three-quarters in technical roles—reporting extra capacity. While workforce size remains stable, and demand may improve as large-scale film production recovers in late 2024 (particularly for roles like VFX, which are also supported by the latest changes to the UK's VFX tax relief scheme), there are risks to current worker retention due to ongoing shortages in roles in these areas in particular.

Each UK region has different skills and training needs, according to demand. The research demonstrated that the UK workforce is composed of specialist pools who rarely move from one type of content to another, or from one role to another. As a result, each UK Region and Nations may need different support – either in dealing with skills gaps, or with over-supply of individuals in certain roles. The South West and Scottish workforces face retention issues stemming from low demand for unscripted TV. London is seeing pressure on VFX and craft, but ongoing post-production skills needs. The North East, North West, Midlands and Yorkshire have a greater need for upskilling of workers in technical roles (lighting, cameras, etc).

Ampere's modelling estimates that the UK has an off-screen crew workforce of 183,000 – 194,000

- The number of distinct individuals active in the workforce – considering individuals who may be credited across multiple productions, or on multiple roles on the same production – has been estimated via the process illustrated in the methodology section. This workforce modelling identifies the total credited crew workforce at between 163,000 – 177,000 individuals
- With assumptions made for under-credited crew (primarily driven by runners and other support roles) and the ancillary workforce (indirect support roles), the total workforce for UK TV & film productions is estimated to lie between 183,000 – 194,000. Marginal growth in the number of individuals does not reflect the number of available roles, and highlights a growing degree of underutilisation of the workforce (see capacity & activity section of the report)
- This workforce estimate reflects the distinct number of individuals working in the industry on a full- or part-time basis, whereas other estimates may use full-time equivalents (FTE), which adjust for part-time and freelance work by measuring total labour as if all roles were full-time positions

Number of distinct individuals participating in the film & TV production workforce, 2022-2024



Source: Ampere Analysis estimates – note as 2024 data includes a greater share of titles in production with credits yet to be revealed, figures for 2024 are more heavily modelled and should be treated as forecasts

This compares to other workforce employment estimates of between 50,000 – 200,000

Workforce sizing comparison to other published statistics and estimates

Office for National Statistics

- The Office for National Statistics (ONS) publishes employee and employment estimates for Great Britain and UK split by Standard Industrial Classifications (SIC codes) annually under the Business Register and Employment Survey (BRES) dataset.
- This produces a total employment figure for the sector between 160,700 – 187,400[1] in 2023
- The challenge behind these estimates is the broad SIC classification system – which may not capture integral parts of the industry, such as employment in visual effects (VFX) or animation, freelance or temporary workers, and the ancillary workforce, which may all fall under different SIC codes like IT or software development, or administrative and other business support activities

ScreenSkills

- ScreenSkills' past research, published in the 2021 Annual ScreenSkills Assessment[2] estimated that around 52,300 full-time equivalents jobs (FTEs) were directly employed in film and high-end TV production in 2021, and forecasted to grow to 68,810 in 2025
- This number focuses on film and high-end TV employment. While these two categories are among the largest sources of employment across sub-sectors, this research does not cover the animated, children's and unscripted TV crew workforces. This prior research also focused on direct employment rather than indirect or related roles (i.e. employment associated with supplier businesses working on the productions). Finally, these figures reflect FTEs, as opposed to individuals working on full-time, part-time or freelance basis as estimated in this study

BFI

- The BFI's research notes significant investments in the UK screen sector, with £5.6 billion spent on film and high-end TV production in 2024, and the BFI's 2021 UK Screen Sector Economy reported the screen sector value chain generated 156,030 FTEs in 2019. However, this includes direct and indirect employment for crew, cast and other roles across the supply chain

- Other databases provide similar benchmark points, however these sources often hold disparate data collected through various means, for example the ScreenSkills user database contains ~180,000 individuals signed up for industry knowledge, jobs and training opportunities; and Mandy's UK jobs directory lists 228,000 individuals (as of Dec 2024) as crew available for hire – including the broader international workforce

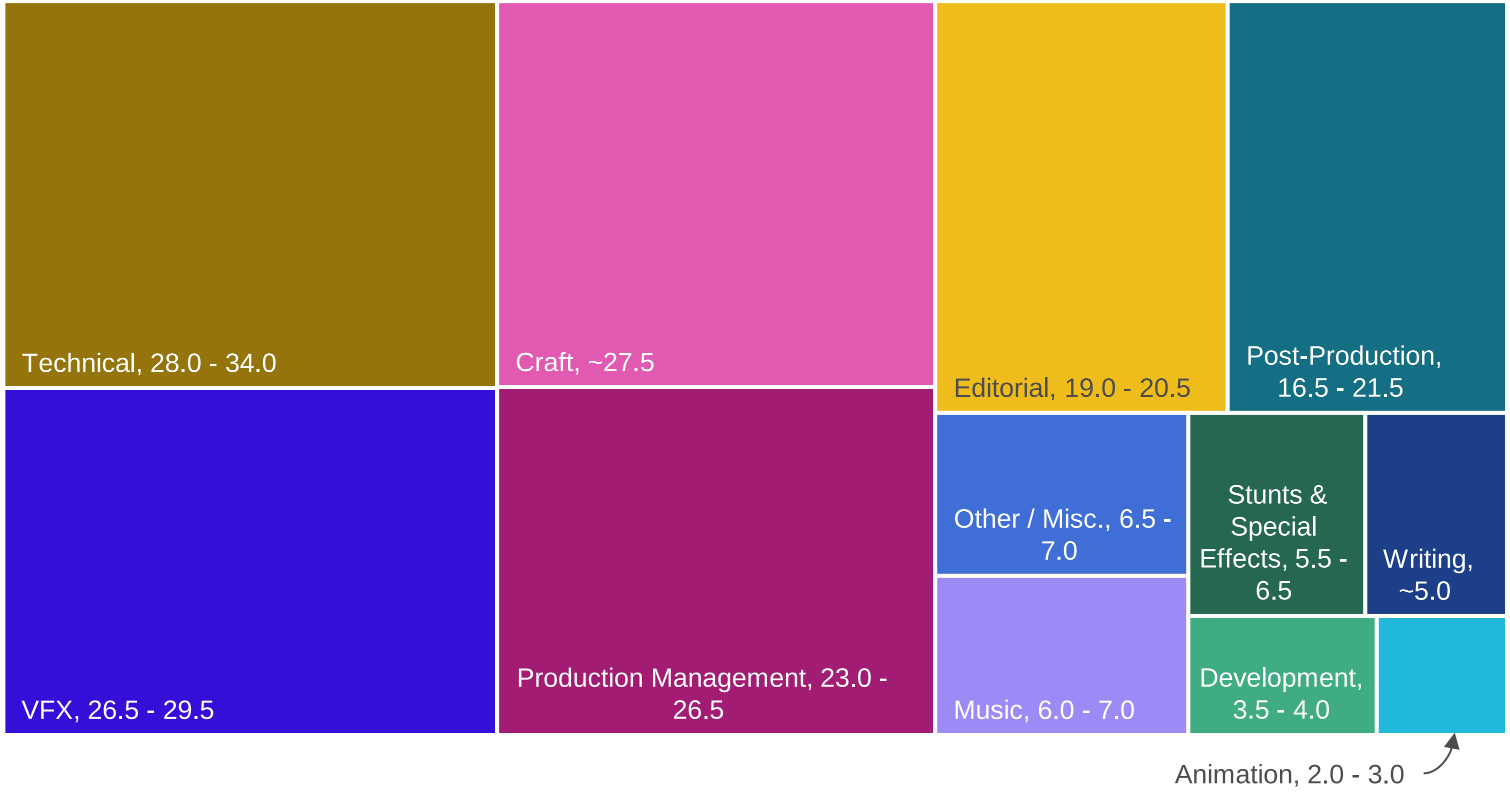
[1] *including SIC codes 59.11 (film & TV Production), 59.12 (film & TV post-production), 59.13 (film & TV distribution), 59.14 (film exhibition) and 60.2 (TV programming and broadcasting), and the larger figure includes 58.21 & 62.011 (Publishing & development of games)*

[2] *https://www.screenskills.com/media/5559/2022-06-23-labour-market-shortages-and-training-investment-needs-research.pdf*

The technical, editorial and craft departments represent ~40% of the workforce

- This chart shows the distribution of distinct individuals estimated to have worked across various departments, regardless of the type of content produced
- The technical, editorial and craft departments make up a significant portion of the workforce. These departments collectively manage both the technical and creative aspects of a production, requiring large teams to handle different facets of the process. The technical team enables the craft team to bring designs to life, while the editorial team ensures the production and final content follows the intended vision
- Smaller departments like animation (which includes only animation artists and specific animation directors/supervisors), writing, and stunts remain critical for specific types of productions. The smallest departments measured include development (i.e., casting, creators/showrunners, researchers) and animation (namely distinct roles working on animated content such as animation artists, animation directors and character designers)

Number of distinct individuals (thousands) participating in the film & TV production workforce*, by production department, 2024



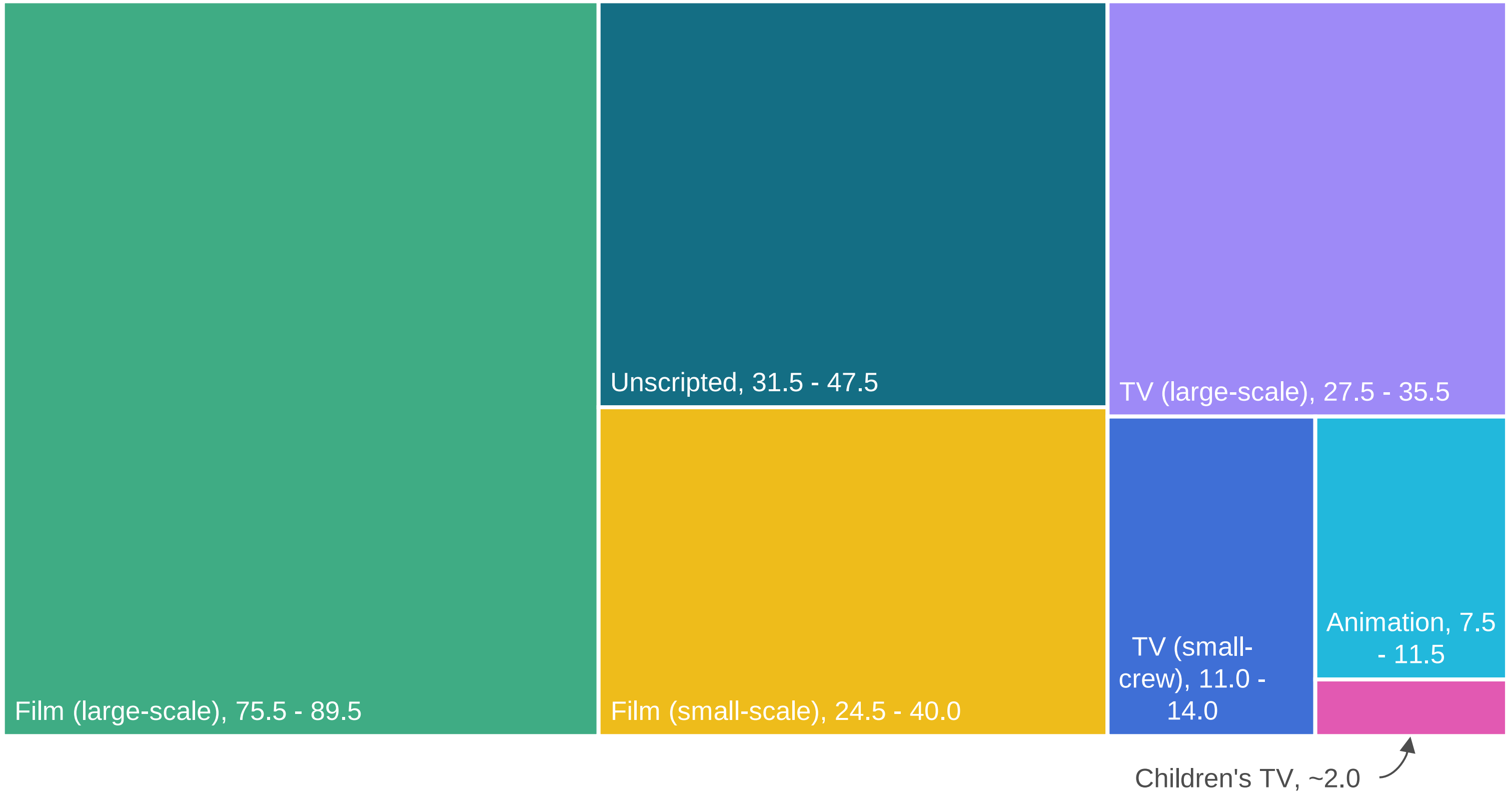
**excluding the ancillary workforce.*

Source: Ampere Analysis estimates, see segment definitions on slides 73-77

Large-scale film and film titles are the biggest drivers of employment

- Across the title classifications adopted by Ampere during the modelling process, the largest single contributor to employment in the TV & film sector are large-scale film titles, which employ between 75.5-89.5 thousand distinct individuals each year. A relatively small number of titles with large crews are responsible for this volume
- Unscripted TV is the second largest contributor to the UK screen workforce – estimated approximately 31.5-47.5 thousand active individuals in 2024. This sub-sector has grown rapidly but seen significant volatility from the commissioning market, leading to large range for the total employment
- Large-scale TV productions, and small-crew films contribute the bulk of the remaining UK screen workforce, with animation and Children's titles smaller – albeit still significant – contributors
- Note that individuals may move between categories, so overlaps exist in the figure on the right. Additional analysis is included around workforce mobility between title categories later in this section

Number of distinct individuals (thousands) participating in the film & TV production workforce*, by content type, 2024



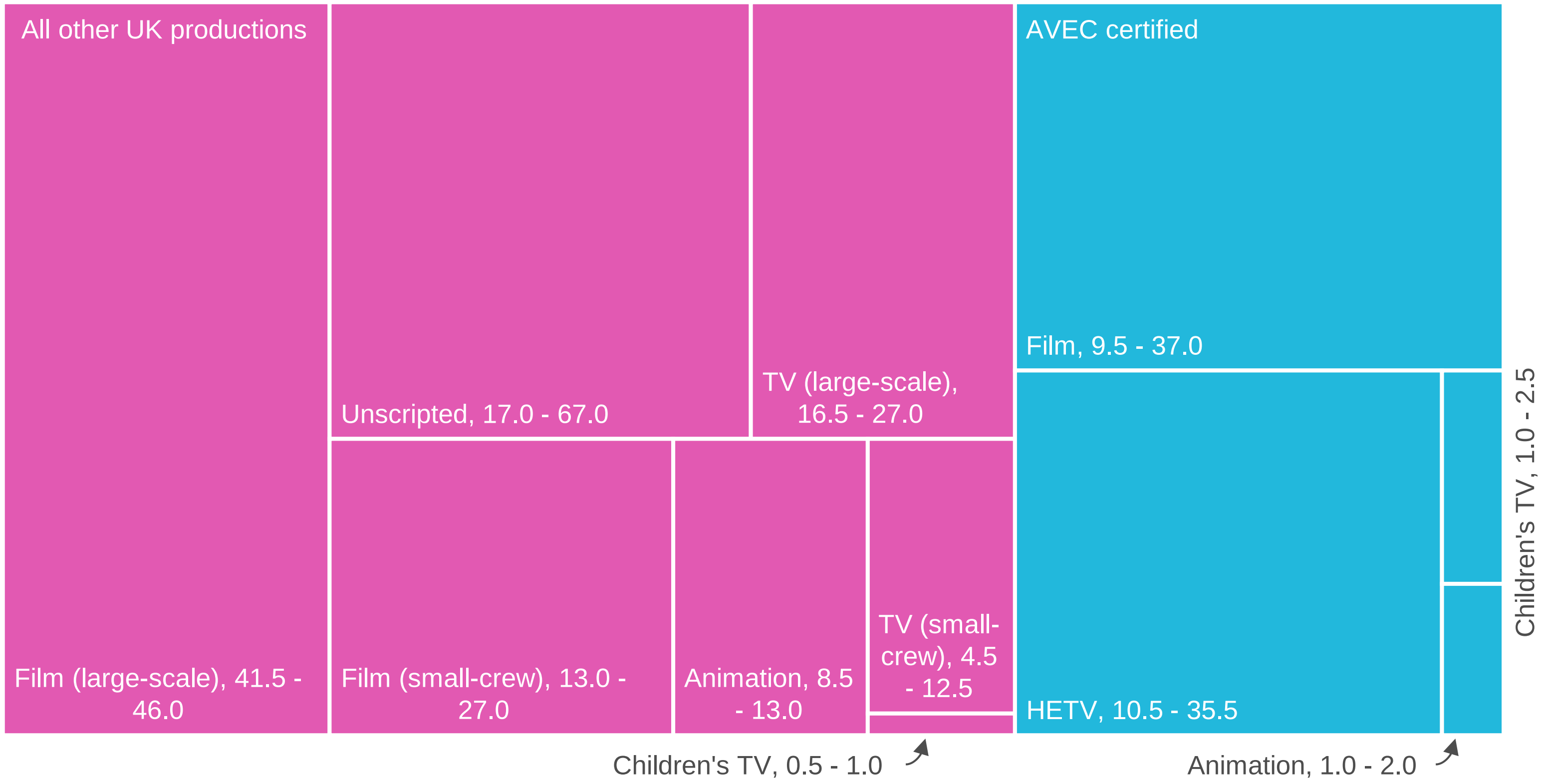
**excluding the ancillary workforce*

Source: Ampere Analysis estimates, see segment definitions on slides 83-86

AVEC segments illustrate HETV is also an important contributor to workforce employment

- Visualising the same data through the lens of content categories for tax relief as tested by the BFI (AVEC categories) illustrates the market from a slightly different perspective. This chart uses 2023 as a base year to profile the workforce by AVEC category, due to the possibility that 2024 productions may not receive certification until 2025
- Unscripted TV and other smaller UK television productions, as well as uncertified film and TV titles drive the bulk of employment in the sector
- Both film and HETV are important contributors. In 2023, Ampere estimates that 20.5 - 40.0 thousand individuals were employed supporting AVEC-certified HETV productions, and 27.5 - 39.5 thousand were employed supporting tax-certified UK film titles
- Note that individuals may move between categories, so overlaps exist in the figure on the right. Additional analysis is included around workforce mobility between title categories later in this section. Due to the time periods associated with the certification processes, data is based on 2023 and earlier certification metrics

Number of distinct individuals (thousands) participating in the film & TV production workforce*, by AVEC categories, 2023**



*excluding the ancillary workforce
**Titles with no tax certification have been further split by content type
Source: Ampere Analysis estimates

And while Greater London is the largest employment driver, 60% of the workforce is outside London

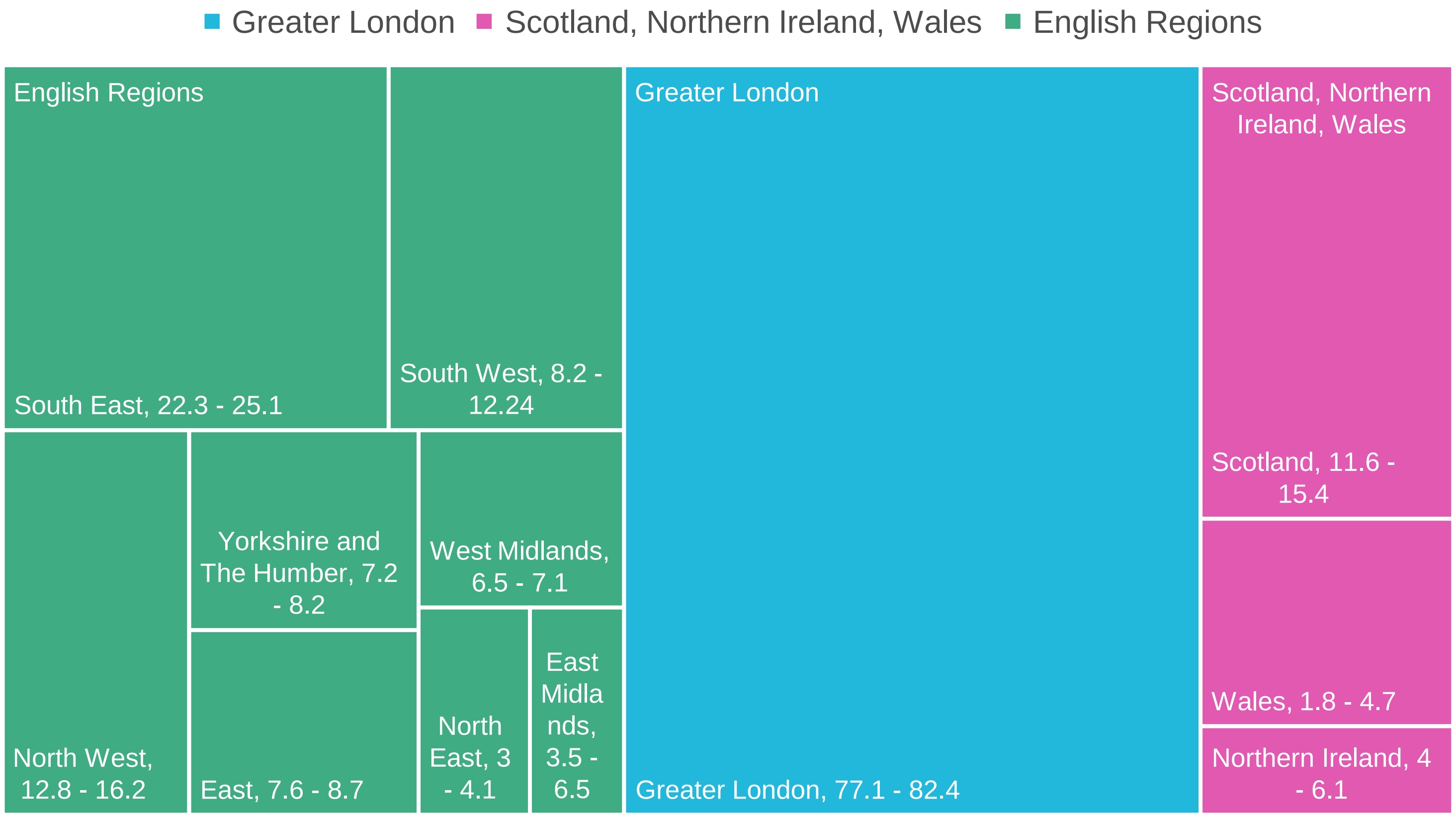
- Ampere workforce modelling with reference to ONS and workforce survey data, places Greater London as the largest contributor to employment in the sector, responsible for an estimated 77-82 thousand individuals

- However, the bulk (approximately 60%) of the UK's screen workforce is based outside Greater London. The largest regional sources of direct employment include the South East of England (between 22-25 thousand individuals), Scotland (between 12-15 thousand individuals), the North West of England (between 13-16 thousand individuals)

- Other regions accounting for 10 thousand individuals or fewer each include Yorkshire and The Humber, the East of England, West Midlands, North East, East Midlands, and Wales and Northern Ireland

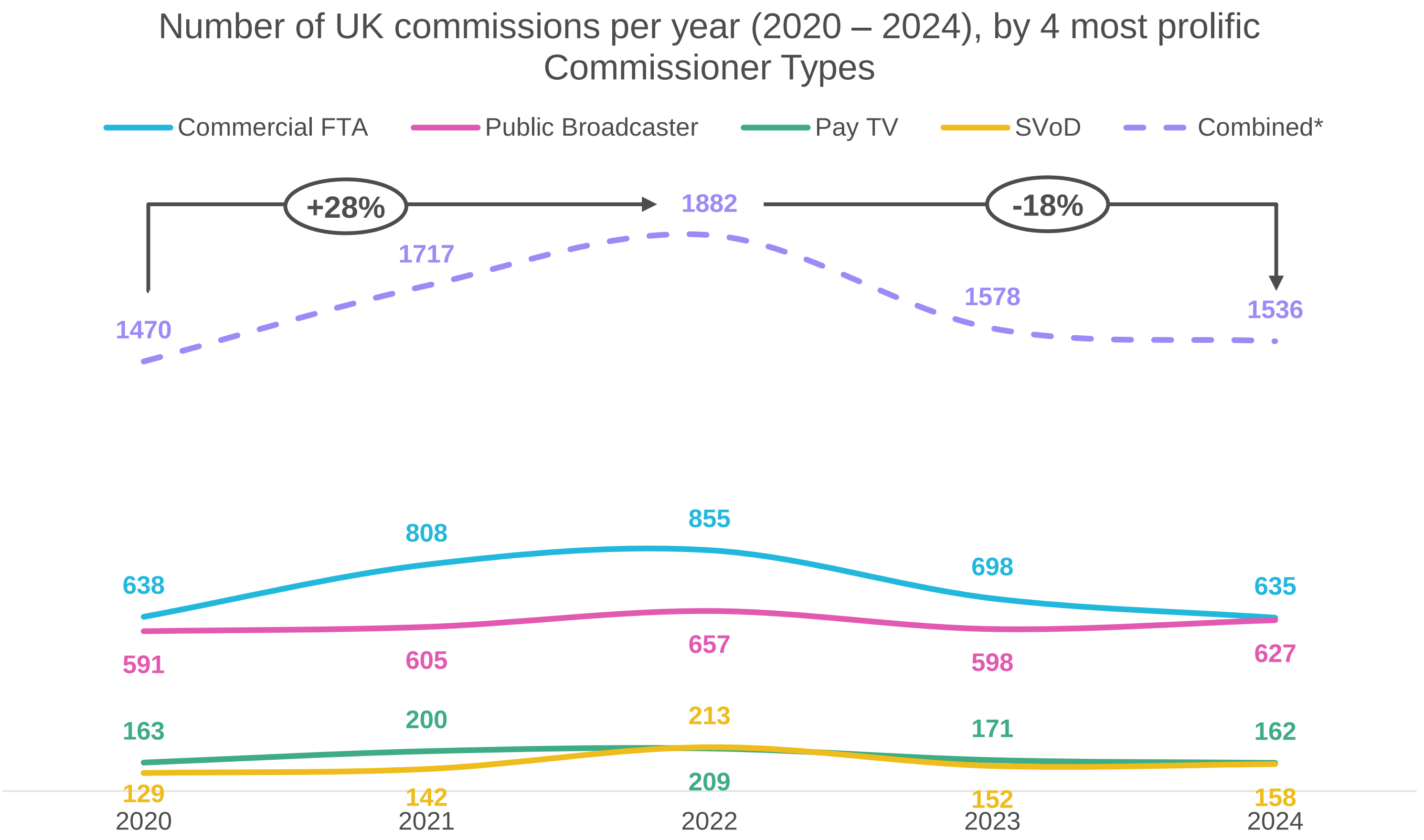
- The composition of the workforce in each region varies. For instance, post-production and VFX roles skew more heavily to Greater London, while technical roles (camera operations, lighting, etc.) are disproportionately represented in the UK's regional production hubs. The impact of these skews is discussed in more detail later in this section

Number of distinct individuals (thousands) participating in the film & TV production workforce, by region, 2024



Source: Ampere Analysis estimates. Regional ranges reflect margin of error in overall market sizing, plus variation in reference point information across ONS, workforce survey data

The UK industry has seen a decline of 18% in commissioning activity since 2022



**includes the number of actual commissions ordered among these four commissioner types without multi-counting co-commissions*
Commercial FTA = ad-supported broadcasters like ITV or Channel 4, Public Broadcaster = publicly-funded broadcasters like the BBC, Pay TV = subscription satellite or cable services like Sky, SVoD = subscription streaming services like Netflix or Amazon

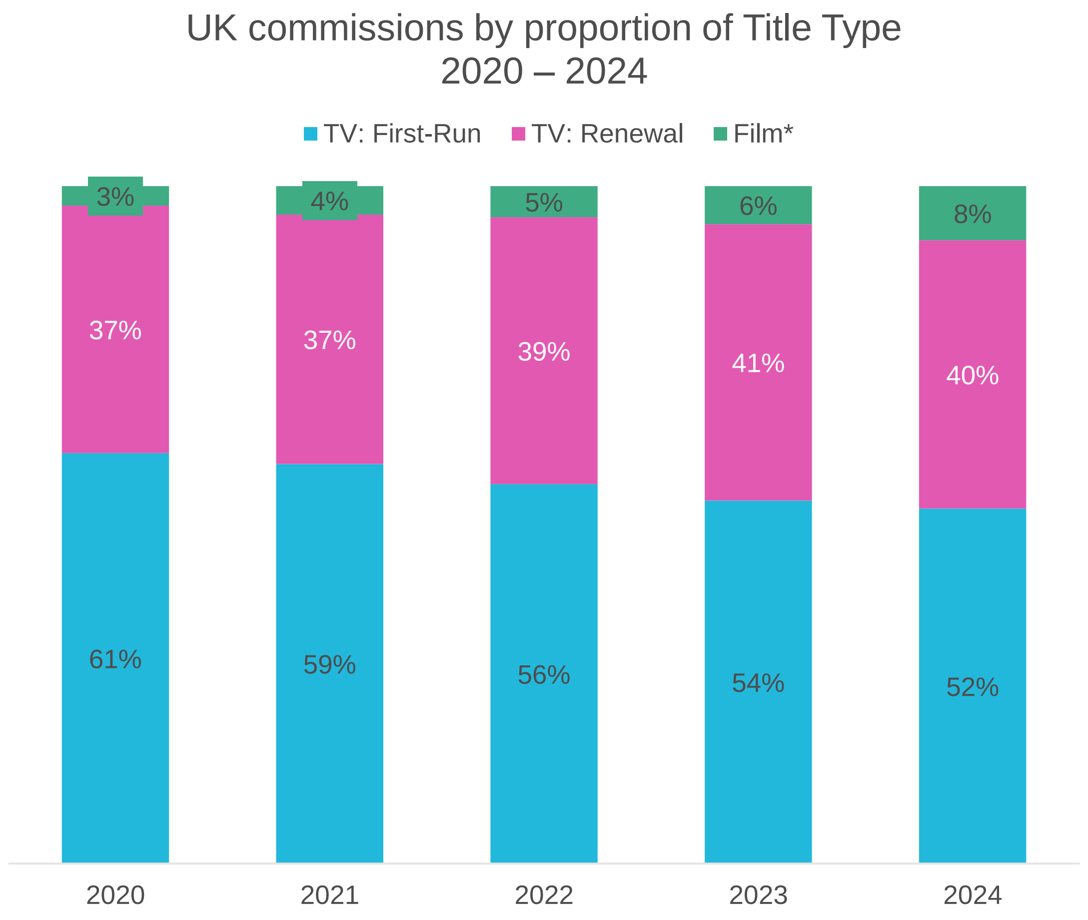
Source: Ampere Commissioning

- The UK production market saw significant growth in activity from major commissioners following the COVID-19 pandemic with the number of film and TV titles ordered rising by 28% between 2020-2022. However, orders have since fallen 18% by 2024. 2024 represented the lowest level of film and TV orders in the UK since 2020

- Commercial free-to-air groups like ITV and Pay TV channel operators like Sky were some of the hardest hit by the UK's economic downturn, and this is reflected in in their commissioning activity. Channel 4, ITV and Sky all commissioned less content in 2024 when compared to the other years since 2020. Over 2022-2024:
  - Channel 4's commissions fell in volume by 38%
  - Sky's fell 26%
  - ITV's fell 21%

- These volume statistics align with the BFI's spend metrics for UK film & HETV, which reports a fall in spending of 25% between 2022-2024 (specific to scripted content certified under these two categories for the UK tax reliefs)

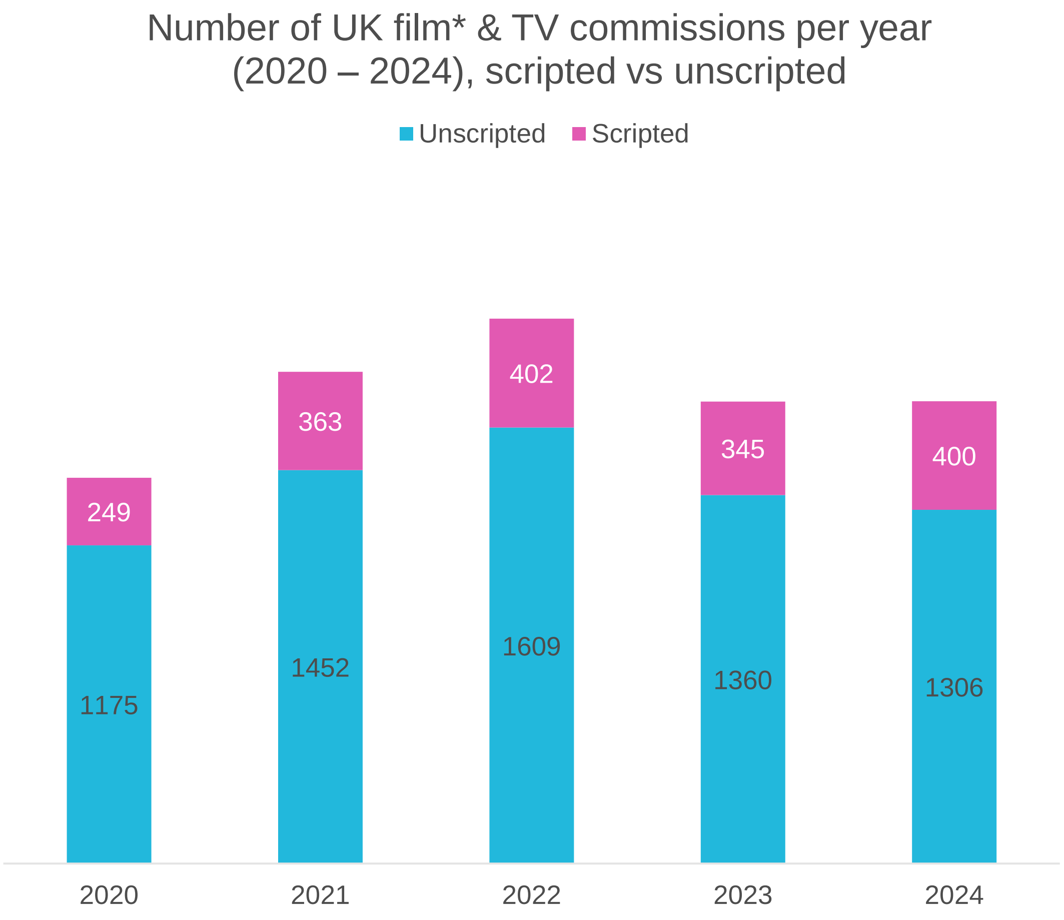
This includes a shift towards TV renewals, away from commissioning new, multi-season shows…



**Excluding independent and short film, and feature-length TV content*
Source: Ampere Commissioning

- As the overall number of TV and film orders decreased in the UK due to the economic downturn, inflationary pressures, and the spending cuts among major UK broadcasters, commissioners of UK TV content have gradually shifted towards relying more heavily on established, previously-tested content with a reliable audience
- One effect of this has been a focus from UK commissioners on Renewals rather than First-Run shows. For the UK crew workforce, this means fewer greenlight opportunities given to entirely new ideas and heavier reliance on returning content and the creatives associated with successful properties
- This shift has been particularly significant among the commissions of the UK's largest TV content commissioner – the BBC. The share of commissions which were renewals of existing series rose from 37% in 2020 to 40% in 2024
- And with the decrease in commissions, the number of announced cancellations rose sharply in 2024 with 92 UK productions announced as cancelled that year while only 41 titles were cancelled in 2022. Over the period, announced cancellations from the BBC and Channel 4 in particular grew by 210% and 260%, respectively

… plus a larger decline in unscripted film & TV activity, and focus on lower-cost scripted projects



*Excluding independent and short film, and feature-length TV content
Source: Ampere Commissioning

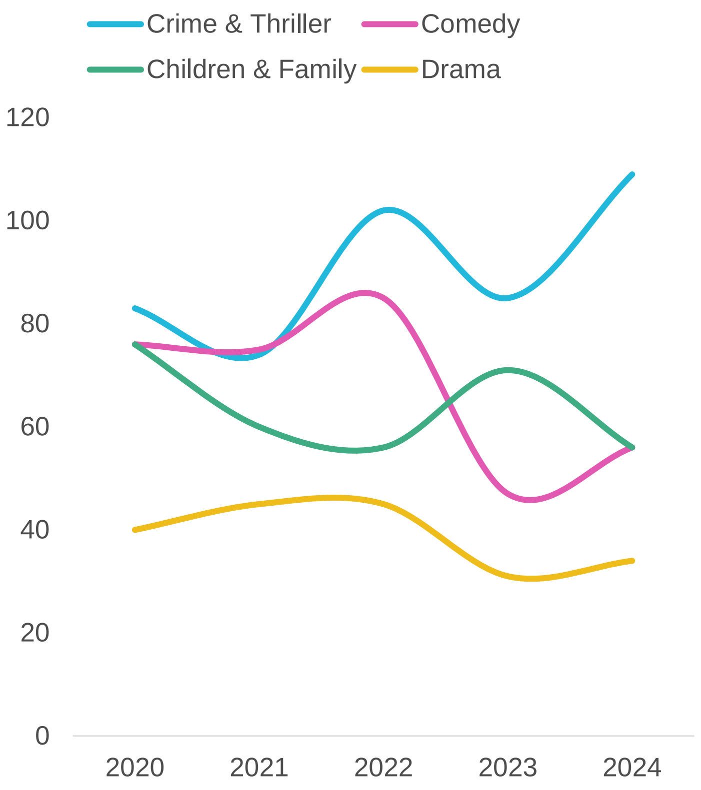
- While scripted film and TV content produced in the UK increased by 4% between 2020 and 2022, Unscripted content orders rose by 36%. This growth was relative to 2020 figures which were already inflated due to the transient demand for quick-turnaround unscripted titles needed to fill COVID-driven schedule gaps. During the post-lockdown ad market downturn, the shorter production timescales and lower budget requirements commonly associated with unscripted meant that broadcasters were able to use such content to fill schedules efficiently. Streamers also began to expand their focus into unscripted TV as a way of localising catalogues cheaply.

- Both scripted and unscripted categories have declined since 2022. 2024 film volumes were down 20% compared to 2022. Scripted content saw a less significant decrease in the last two years – down by 13% in 2024 when compared to 2022, and actually up by 7% when compared to 2023. However, focus from commissioners has shifted in budget terms, with a reduction in the highest-cost content in favour of more economical scripted shows.

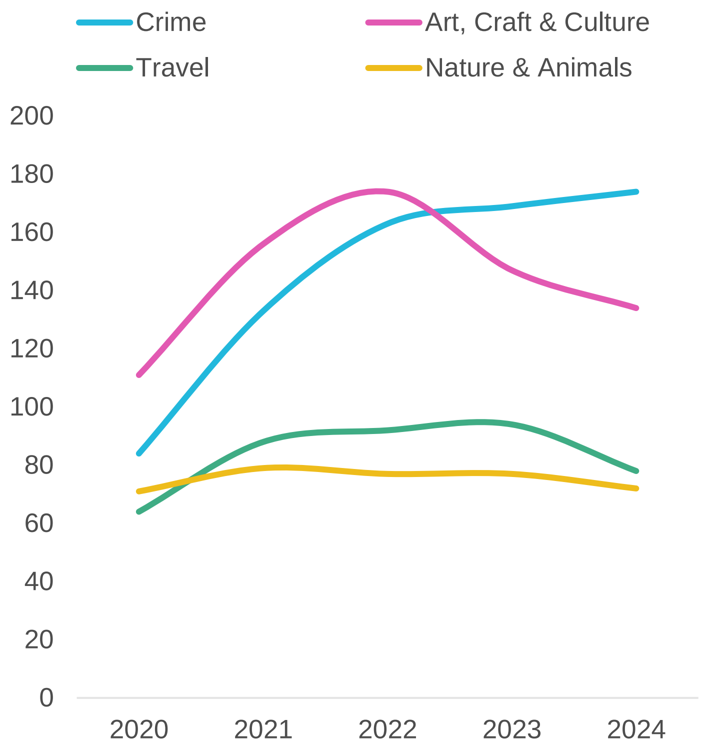
Industry perspective: Interviewees highlighted the challenging trading environment driven by the commissioning downturn, resulting in many groups downsizing. The few exceptions were producers with more consistent, regularly-returning TV productions. Many interviewees also noted a change in the commissioning landscape, away from multi-season commissioning and towards a more risk-averse approach focusing on single series with a higher chance of rapid return on investment

Skews in commissioning activity drives demand for certain types of content even during a downturn

Volume of scripted UK TV orders for first-run & renewed titles among the top-4 genres, 2020 – 2024



Volume of unscripted (documentary & reality) UK TV orders for first-run & renewed titles among the top-4 sub-genres, 2020 – 2024



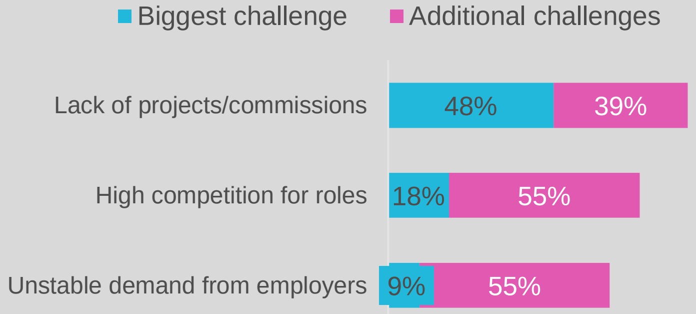
- The underlying trends in TV commissioning activity in the UK mean that the burden of cuts has not fallen equally across different genres, and producers focusing on specific categories of content
- Amidst the UK commissioning downturn, the *Crime & Thriller* genre has seen significant growth. As the most popular genre with UK audiences*, it provides a safer bet for budget-cautious commissioners. Similarly, producers specialising in *True Crime* titles will not have seen the same effects on their pipeline as those working on *Travel* documentaries. This remains true across the smaller volume of film commissions from major UK broadcasters
- Skews in both scripted and unscripted commissioning drive increased demand among a smaller subset of UK producers who are active in growth areas, raising requirements for roles and skills specialised in these areas. Simultaneously they negatively impact creatives and crew developing and looking for work on projects which fall outside the most in-demand genre niches

** Source: Ampere Consumer Survey Q3 2024, Source: Ampere Commissioning*

In the current content downturn, workers are finding it challenging to obtain new roles

- The impact of the commissioning downturn on the workforce is exemplified by the *two thirds* of non-permanent employees that found securing new roles to be difficult over the last 12 months
- Cross-sector training and skills programmes emphasising complementary skills and placement schemes could alleviate some of these difficulties. However, the commissioning downturn may limit producers' ability to offer paid-placements without funding support

Top employment challenges faced (% of 'Hard' or 'Very Hard' to find work)[2]



Others include lack of projects requiring skills or of interest, lower rates of pay than usual, limited networking opportunities, geographic constraints, skill gaps, and emerging tech reducing demand for skills (e.g. AI)

Workforce survey: Experience finding work over the last 12 months[1]

(highlighting indicates variance from the sample total figure)

% of Column (Temps, Freelancers, Unemployed)[1]	Total	Craft	Editorial	Post-production	Production management	Technical	Other*
Very easy	2%	3%	3%	2%	2%	1%	2%
Easy	7%	6%	3%	11%	9%	4%	7%
OK	26%	30%	21%	31%	27%	25%	20%
Hard	26%	27%	26%	25%	27%	23%	29%
Very hard	39%	33%	47%	31%	34%	48%	42%
Hard or Very hard	65%	60%	73%	56%	61%	71%	71%

[1]N = 875 (inc. Temps, Freelancers and Unemployed but seeking work)

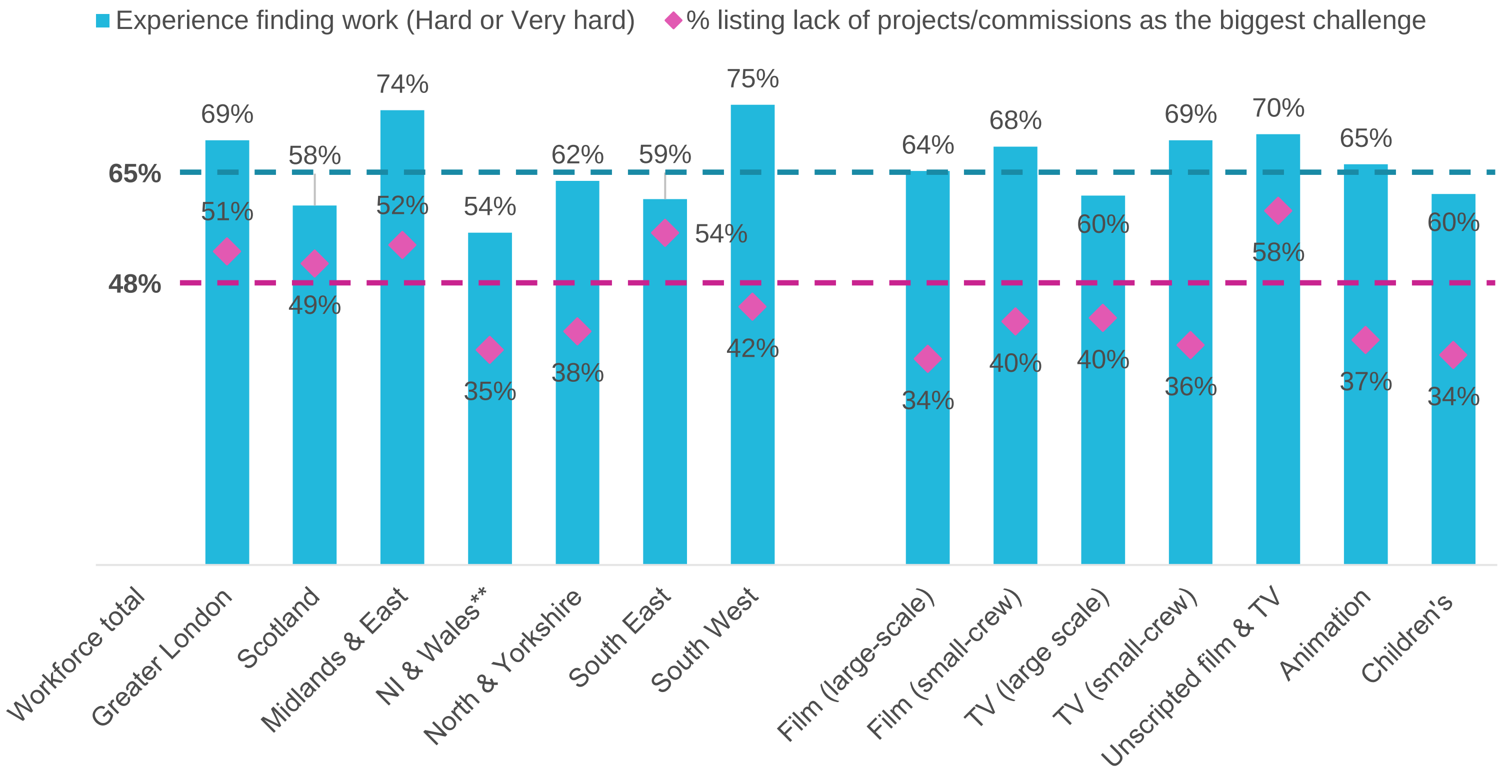
[2]N = 563 (% of Temps, Freelancers and Unemployed finding it 'Hard' or 'Very Hard' to find work in last 12 months)

**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

These challenges securing new roles have been felt across the wider UK workforce and sub-sectors

- The commissioning downturn has impacted the screen production industry across the UK and has been felt by individuals in each sub-sector and region
- The greatest variations in difficulty securing new roles over the last 12 months were reported by individuals across Scotland and the South East among whom only 58%-59% reported difficulty (relative to 65% across the overall workforce). Individuals in the South West, Midlands & East, as well as those working on Unscripted content were more likely to report difficulties (68%-75%, against a national average of 65%)
- The biggest challenge reported among the workforce was the lack of projects/commissions, and this remained the most common challenge across sub-sectors and across the different regions in the UK. This challenge was most commonly cited by those working on unscripted content – aligning with UK commissioning trends

Workforce survey: Experience finding work over the last 12 months and top employment challenge faced, by UK residence and content type



[1]N = 875 (inc. Temps, Freelancers and Unemployed but seeking work)

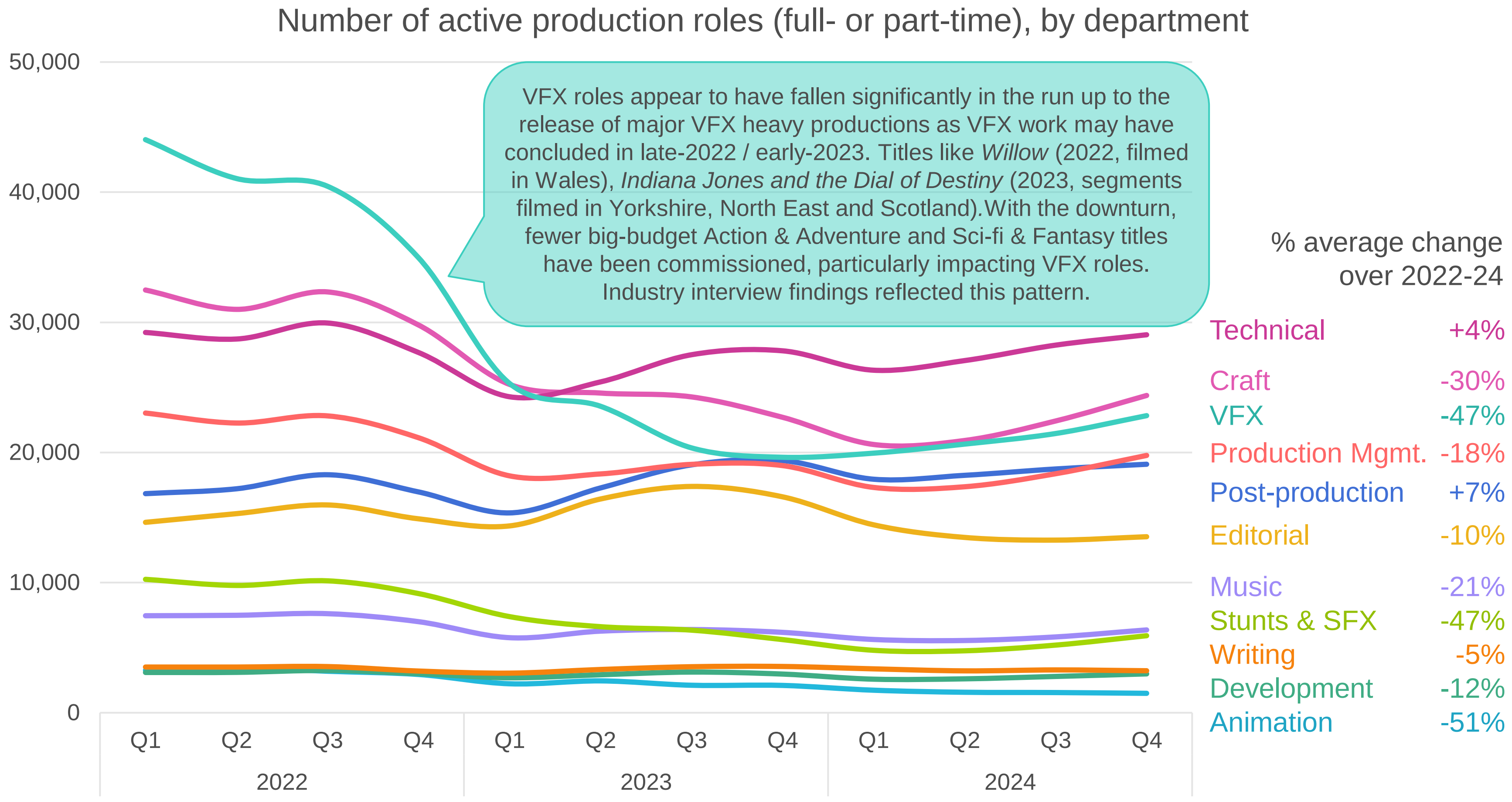
[2]N = 563 (% of Temps, Freelancers and Unemployed finding it 'Hard' or 'Very Hard' to find work in last 12 months)

**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

***Use with caution – low sub-sample sizes result in high margins of error (as a pilot study, sub-samples of less than 100 were achieved among some nations & regions)*

VFX, animation and stunts & special effects departments have seen almost 50% fewer roles than in 2022

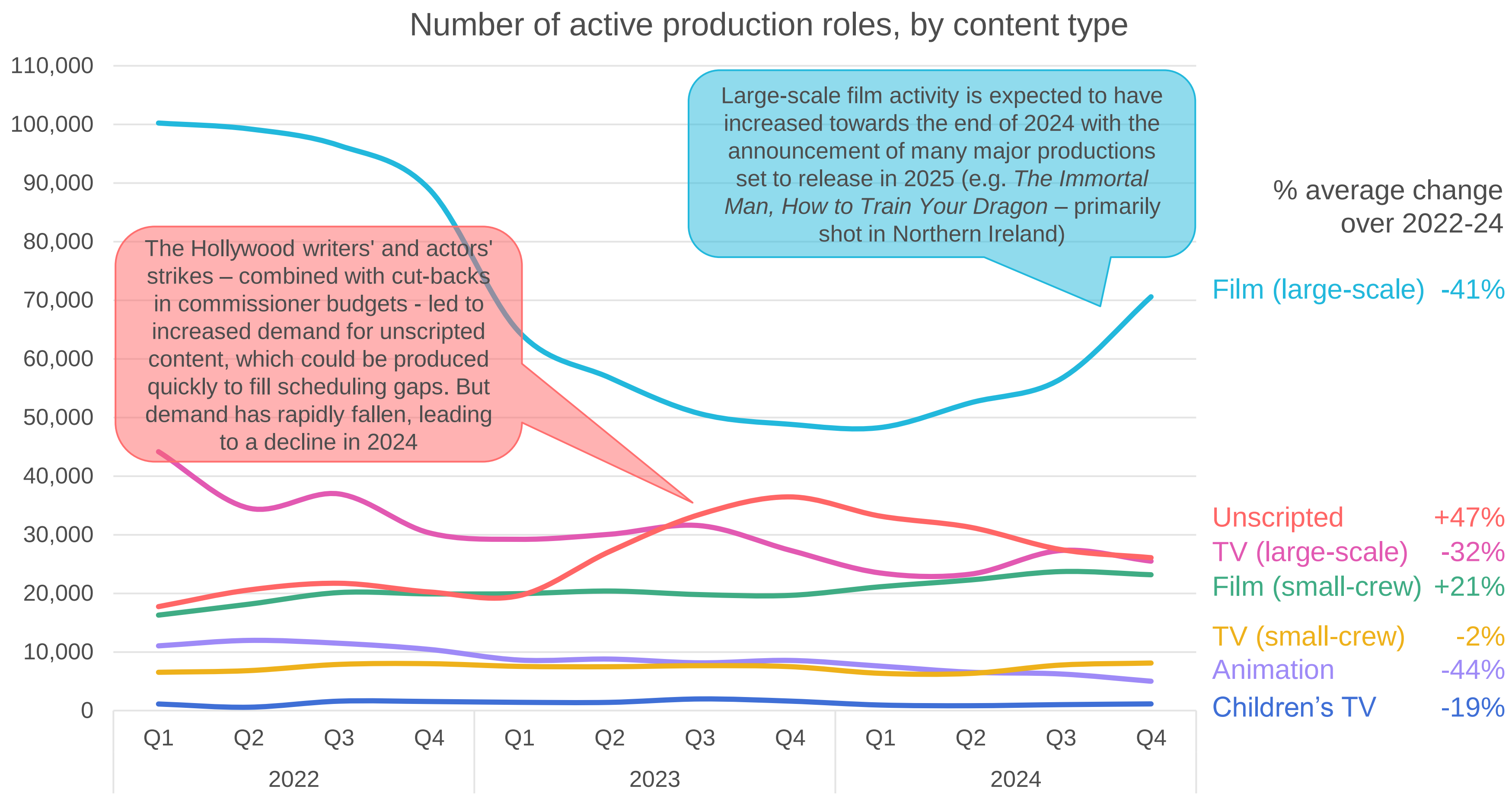
- The figure to the right shows the workforce activity by production department in terms of the total active roles associated with UK productions over time
- VFX and stunts & special effects roles have seen some of the largest declines in activity between 2022 and 2024 due to the drop in the volume of high-budget content associated with these roles. animation similarly saw a substantial decline, albeit from a smaller base, impacted by declines in Children's and Family TV and film (as per Ampere's genre categories)
- Activity in post-production appears to have increased, although this chart does not fully reflect the scale of any individual role – there may still be hidden pressures in this area



Source: Ampere Analysis estimates – note as 2024 data includes a greater share of titles in production with credits yet to be revealed, figures for 2024 are more heavily modelled and should be treated as forecasts

These changes have been driven heavily by declines in large-scale film and TV productions

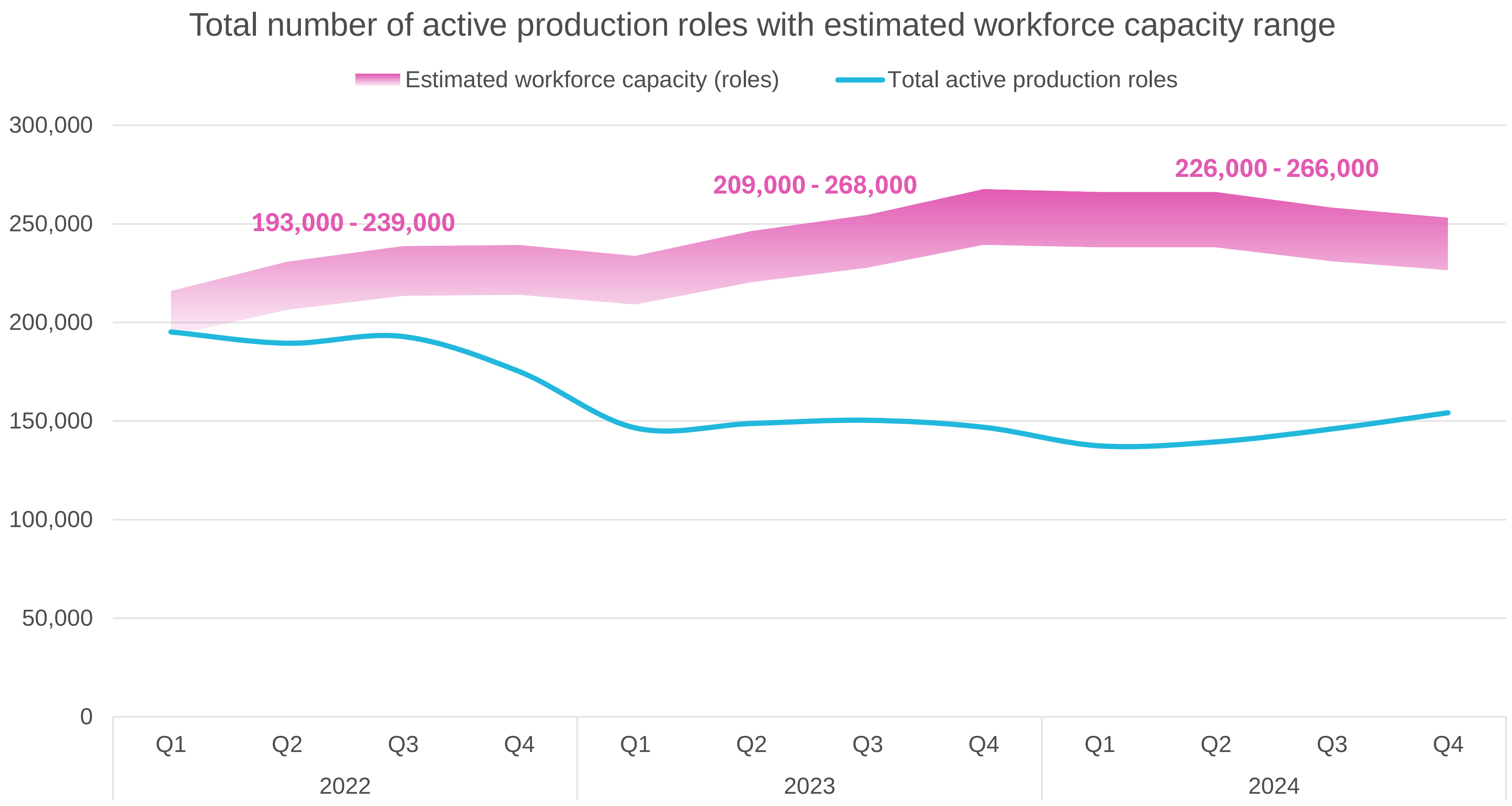
- Similarly, the chart to the right illustrates those same roles, broken down by categories of titles used by Ampere in the modelling process
- Roles associated with large-scale film and TV have both declined over the past two years, as a consequence of budgetary cuts at major streamers and as a result of the Hollywood strikes
- Large-scale film activity is beginning to recover, and large-scale TV has begun to stabilise. This is likely to support a future recovery for certain roles – such as VFX – which are often engaged late in production cycles.
- Expanded VFX tax incentives brought in by the UK Government are also likely to support recovery in UK VFX and related roles



Source: Ampere Analysis estimates – note as 2024 data includes a greater share of titles in production with credits yet to be revealed, figures for 2024 are more heavily modelled and should be treated as forecasts

… and has left the workforce at a ~60% utilisation rate of the estimated workforce capacity in ‘23-24

- The figure to the right shows the total workforce capacity and its level of utilisation. The pink range illustrates the number of individuals likely to be able to work on projects, and the blue line the number of active roles
- The capacity estimate accounts both for currently active individuals, as well as individuals who might have worked on projects in preceding periods but may not necessarily be reflected within the ‘active’ workforce. Estimates make provision for leavers – largely those who have not appeared in credited roles since late-2021 / early-2022
- Overall capacity has grown as a consequence of the influx of new workers taken on for projects commissioned in 2022. The data indicates that the workforce utilization rate (the % of available workers who are engaged on a project) has dropped from 80%-90% in 2022 to approximately 60% in 2023-2024



Source: Ampere Analysis estimates – note as 2024 data includes a greater share of titles in production with credits yet to be revealed, figures for 2024 are more heavily modelled and should be treated as forecasts

The under-utilisation issue is particularly challenging for those entering the industry

- Responses to the workforce survey confirm that employees across every department are feeling the impact of the downturn in the production market. 71% of the workforce indicated they were undercapacity, and half of the total workforce reported having *significant* extra capacity for work, increasing to nearly three quarters of those in the technical department. The post-production and technical departments may be more sensitive to changes in the number of projects due to its shorter-term involvement during the production process
- Respondents working on Independent or low-/medium-budget film reported the greatest likelihood to be undercapacity. Greater pressures were reported in particular by workers in the Midlands & East, North & Yorkshire (likely reflecting the fall in scripted spend since the commissioning boom) and South West (likely to have been affected by recent falls in unscripted commissioning)
- Respondents in junior or entry-level roles reported the most significant impact on capacity (82% vs. 69% at more senior levels), indicating the current environment is particularly difficult for recent entrants to the screen workforce

Workforce survey: Current production slate, by department, content type and nations & regions

(highlighting indicates variance from the workforce total figure)

% of Column	Total	Craft	Editorial	Post-production	Production management	Technical	Other*
Over capacity	4%	5%	3%	4%	4%	2%	4%
At capacity	25%	24%	25%	28%	33%	9%	24%
Undercapacity	71%	71%	72%	68%	63%	89%	72%

% of Column	Total	Unscripted film & TV	Medium-Low budget	High-budget scripted TV	Film (independent & medium-low budget)	Film (big budget)	Children's content	Animated content
Over capacity	4%	3%	5%	4%	3%	5%	4%	6%
At capacity	25%	24%	20%	28%	18%	28%	26%	26%
Undercapacity	71%	73%	75%	68%	79%	66%	70%	68%

% of Column	Total	Greater London	Midlands & East	NI & Wales[1]	North & Yorkshire	Scotland	South East	South West
Over capacity	3%	4%	3%	6%	4%	4%	5%	3%
At capacity	23%	25%	18%	26%	21%	28%	29%	23%
Undercapacity	71%	71%	79%	68%	75%	68%	66%	74%

N = 1083

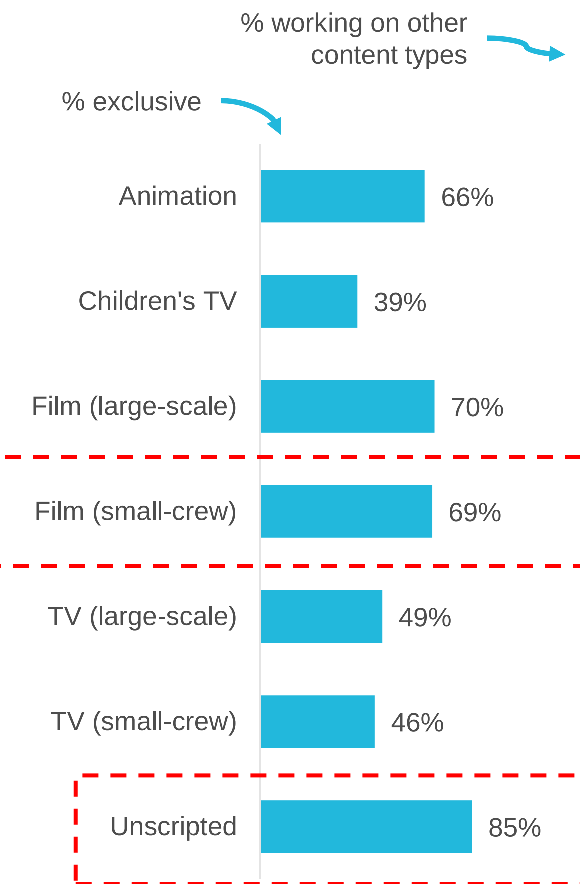
**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*
[1] Use with caution – low sub-sample sizes result in high margins of error (as a pilot study, sub-samples of less than 100 were achieved among some nations & regions)

Which sectors do the workforce work between?

Unscripted and film (small-crew) have largely specialist pools, distinct from other parts of the workforce

- This chart and table highlights specialist pools within the workforce – namely areas where the workforce exclusively contributes to a single content type, or frequently works across areas. For instance, 70% of those who worked on large-scale film projects *only* worked on large-scale films
- This data illustrates that certain roles do not commonly move from one content category to another. For instance, 85% of those who work in unscripted TV only work on unscripted TV
- Similarly, those working in film rarely work on TV projects – and where they do, the projects tend to be large-scale (generally scripted TV) titles
- Cross-sector upskilling is key for improving transferability across specialist pools and to support individuals during downturns which are unevenly impacting different components of the market

Proportion of workforce working across multiple content types, 2022-2024



	Animation	Children's TV	Film (large-scale)	Film (small-crew)	TV (large-scale)	TV (small-crew)	Unscripted
Animation	-	1%	**26%**	3%	15%	2%	2%
Children's TV	6%	-	**32%**	14%	**36%**	18%	9%
Film (large-scale)	5%	1%	-	6%	**21%**	4%	3%
Film (small-crew)	2%	1%	17%	-	15%	8%	8%
TV (large-scale)	5%	2%	**38%**	9%	-	11%	5%
TV (small-crew)	2%	4%	**21%**	17%	**36%**	-	11%
Unscripted	1%	1%	6%	6%	6%	4%	-

Source: Ampere workforce modelling – based on credited roles across titles monitored from 2022-2025

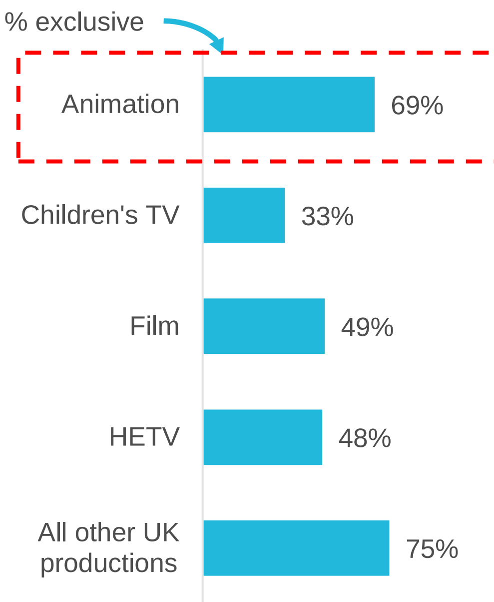
AVEC categories also indicate those working on animated titles rarely work on other types of content

- The figure to the right similarly illustrates the movement of individuals between categories of content – but organised instead by content categories for tax relief as tested by the BFI (AVEC categories) – rather than those used in the modelling process by Ampere

- Similarly to the previous slide, it illustrates that individuals who work in certain categories rarely move to content outside those categories. For instance, nearly 70% of those working on animated titles only work on animated titles

- Ampere would note that AVEC categories are broad and not clearly taxonomically distinct (see slide 87), and are therefore not necessarily useful in understanding specialist talent pools and limitations around job mobility within the sector

Proportion of workforce working across multiple AVEC categories, 2022-2024



% working on other content types

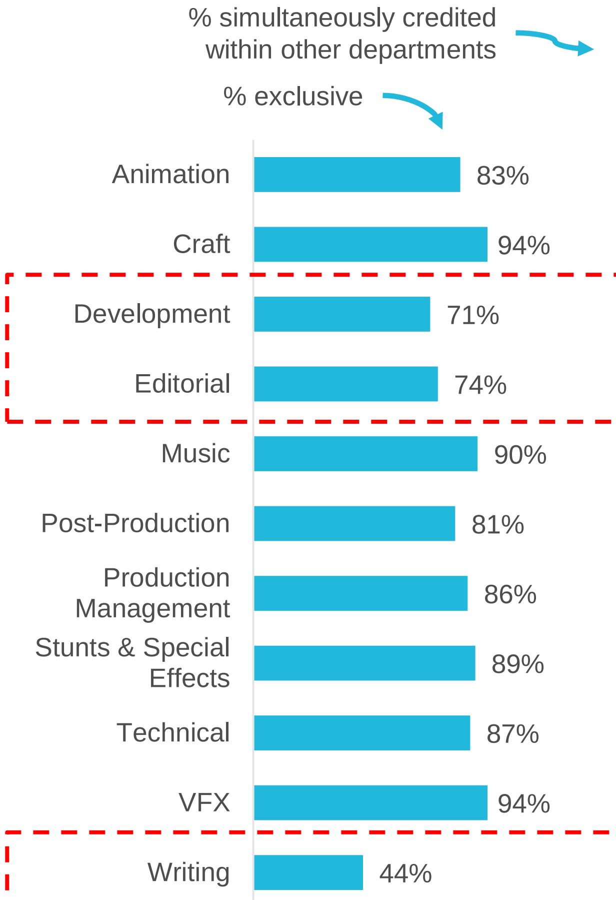
	Animation	Children's TV	Film	HETV	All other UK productions
Animation	-	4%	13%	16%	**23%**
Children's TV	3%	-	**30%**	**43%**	**41%**
Film	1%	2%	-	**31%**	**35%**
HETV	1%	2%	**31%**	-	**35%**
All other UK productions	0%	1%	15%	16%	-

Source: Ampere workforce modelling – based on credited roles across titles monitored from 2022-2025

Which sectors do the workforce work between?

Workers in editorial, development and writing may move between these departments

Proportion of workforce working across multiple departments, 2022-2024



	Animation	Craft	Development	Editorial	Music	Post-Production	Production Management	Stunts & Special Effects	Technical	VFX	Writing
Animation	-	5%	0%	2%	0%	1%	1%	1%	1%	9%	1%
Craft	1%	-	0%	1%	0%	0%	1%	1%	1%	1%	0%
Development	0%	2%	-	**21%**	1%	3%	4%	1%	3%	0%	**11%**
Editorial	0%	1%	3%	-	1%	5%	5%	0%	6%	1%	**13%**
Music	0%	0%	1%	4%	-	5%	1%	0%	4%	0%	2%
Post-Production	0%	1%	1%	7%	2%	-	2%	0%	**10%**	2%	4%
Production Management	0%	2%	1%	5%	0%	1%	-	1%	4%	1%	1%
Stunts & Special Effects	0%	4%	0%	1%	0%	1%	3%	-	2%	1%	0%
Technical	0%	1%	0%	4%	1%	5%	3%	0%	-	1%	2%
VFX	1%	1%	0%	1%	0%	1%	1%	0%	1%	-	0%
Writing	1%	2%	6%	**51%**	2%	**10%**	3%	1%	9%	1%	-

Source: Ampere workforce modelling – based on credited roles across titles monitored from 2022-2025

Unscripted editorial, post-production, VFX and Stunts & Special effects roles are highly specialised

- This table highlights specialist talent pools within the workforce, by department and by content type – namely identifying production departments that more solely focus on specified types of productions. For instance, the majority of the animation departments unsurprisingly only work on animation content – with only 23% of this workforce finding applicable employment on large-scale, live-action films.
- Similarly, the VFX and stunts & special effects departments are also specialist with most employment coming from large-scale film, and some from large-scale TV
- This data further emphasises how specialised the unscripted content workforce is – specifically in the editorial and post-production departments. These cohorts may need future support around cross-sector skills to secure roles outside unscripted content production, particularly if the downturn in unscripted content production is maintained
- Other specialist talent pools workforces include the craft and production management departments on large-scale films

Proportion of workforce working across multiple content types, 2022-2024, by production department

(red highlighting indicates specialist talent pools, more dependent on employment from a single content type of production)

	Animation	Children's TV	Film (Large-Scale)	Film (Small-Scale)	TV (Large-Scale)	TV (Small-Scale	Unscripted
Animation	64%	3%	23%	2%	7%	2%	5%
Craft	6%	2%	52%	16%	34%	9%	7%
Development	7%	2%	31%	17%	22%	11%	29%
Editorial	4%	1%	13%	25%	9%	9%	48%
Music	14%	1%	40%	24%	15%	7%	26%
Other / Misc.	6%	1%	50%	9%	21%	4%	19%
Post-Production	7%	2%	27%	23%	19%	10%	40%
Production Management	5%	1%	47%	14%	27%	7%	16%
Stunts & Special Effects	3%	2%	68%	13%	33%	5%	3%
Technical	3%	2%	37%	22%	25%	10%	26%
VFX	14%	1%	72%	5%	32%	2%	2%
Writing	8%	2%	12%	29%	13%	17%	23%

Source: Ampere workforce modelling – based on credited roles across titles monitored from 2022-2025

Upskilling and mobility across productions is key to increasing workforce resilience

- The results indicate that there are a number of roles which are highly specialised. VFX and animation are clear examples, but those working in film content – particularly within editorial and post-production – as well as in films (small-crew) are also specialised.

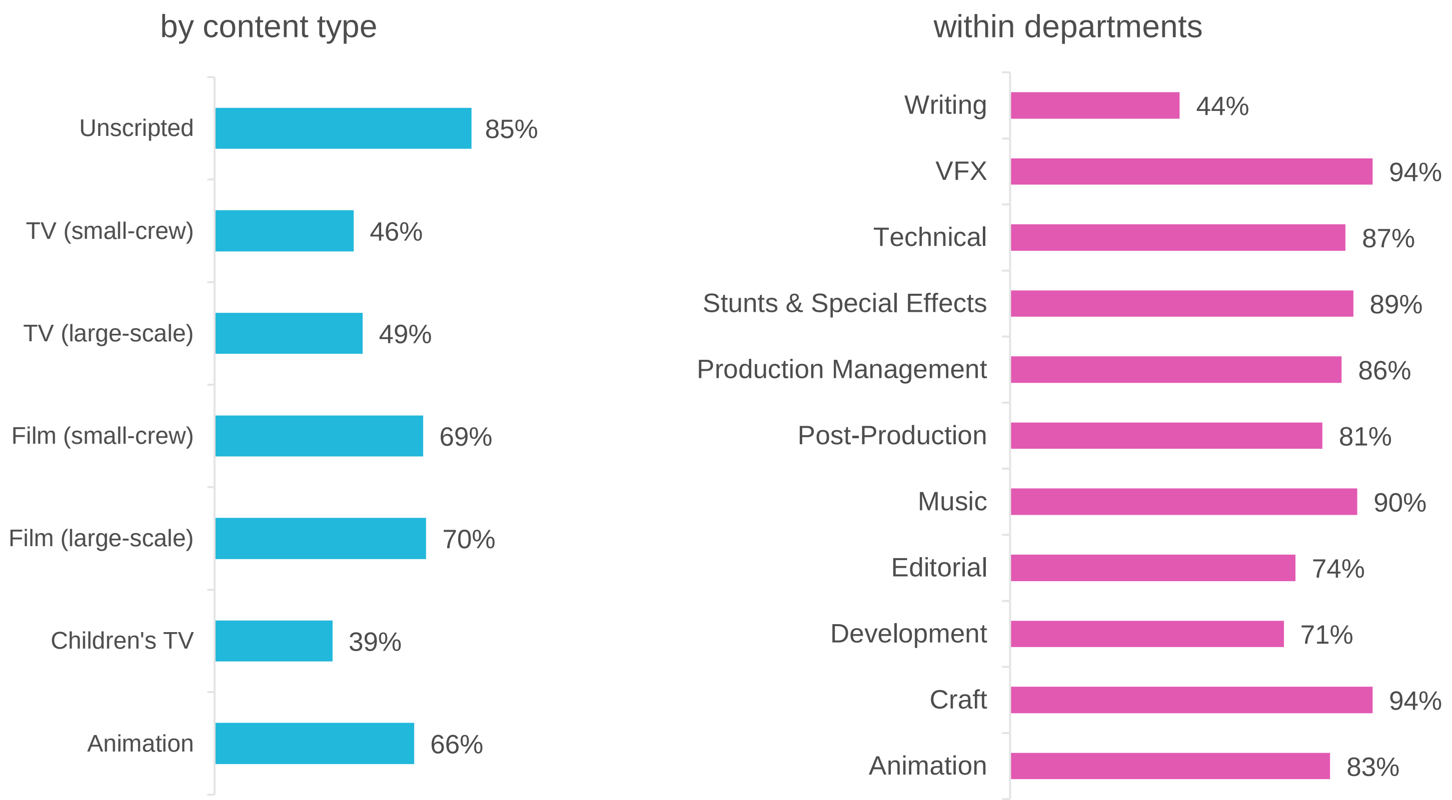
- In the context of growth in certain genres of content, and decline in others, limited workforce mobility may hinder the ability of producers in growth areas to fill roles with appropriately-skilled individuals

Some interviewees noted the challenges of specialised talent pools within the UK film and TV workforce resulting from individuals being highly specialised. A few interviewees active in growth areas indicated that this drives challenges in finding experienced talent with appropriate sector-specific experience. Some also indicated that they regularly receive applications from overqualified, specialised individuals from other sub-sectors which are facing greater pressures.

Some of the interviewees were already looking to improving transferability of their workforces through retraining and skill diversification. Expanding cross-genre or cross-format opportunities and skill transfer for workforces could help address these gaps.

Proportion of workforce working exclusively on certain productions, 2022-2024

(lower percentages indicate more a workforce with more cross-sector skills / experience)

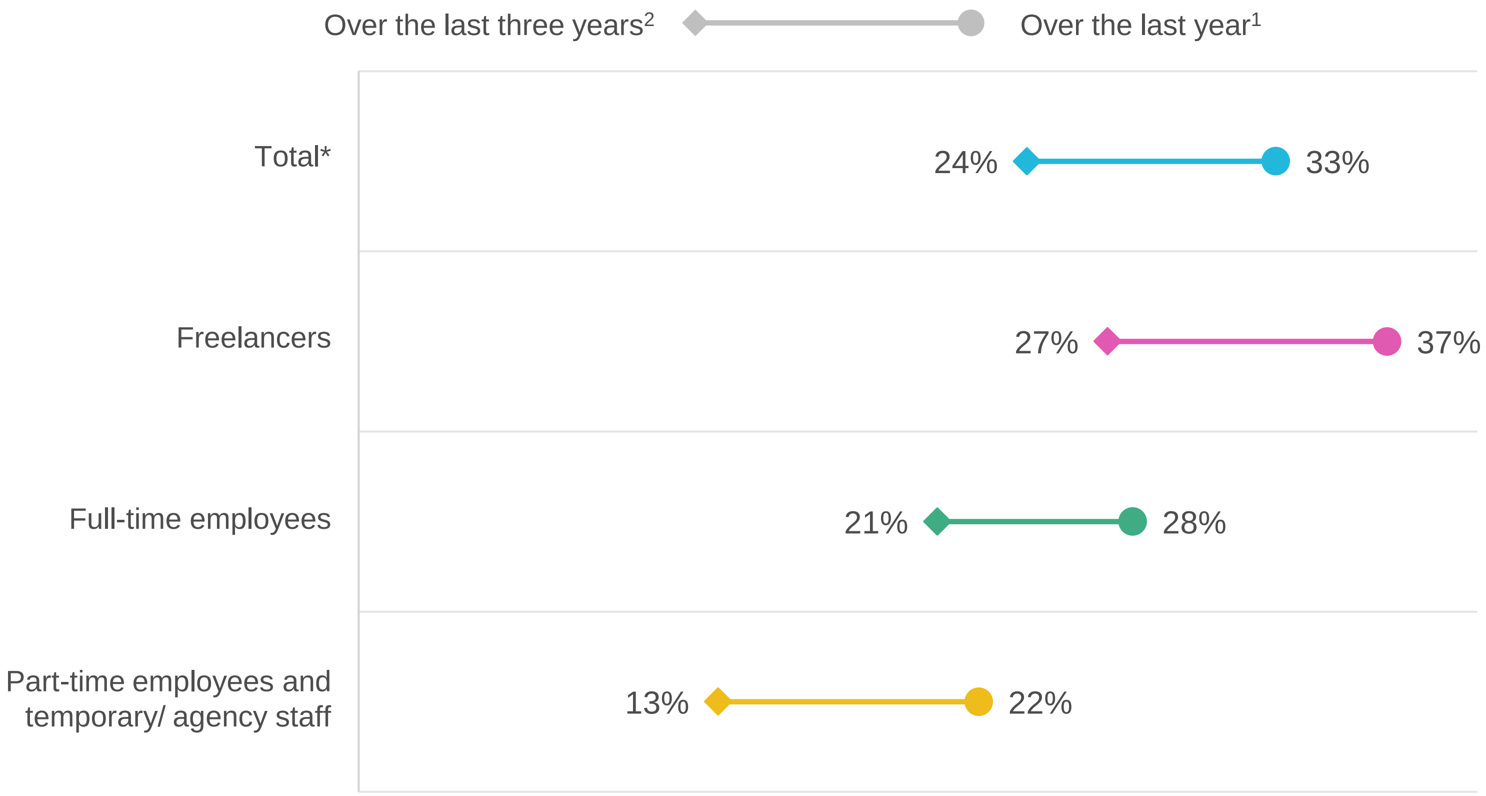


33% of workforce respondents were dissatisfied with their career progress over the last year

- When asked about their career progression and satisfaction, respondents to this workforce survey indicated they had experienced less development in their career over the last year than previously. 33% of respondents reported being dissatisfied with the career progression over the last year, up from 24% over the last three years
- This dissatisfaction was common even among respondents who had previously seen their career progress over the prior three years, but now report no progression in the last year and/or fewer responsibilities
- Career slowdown and dissatisfaction was most common among respondents in editorial roles (despite the greater stability in the number of roles in this category) and among freelancers. More respondents in Greater London were satisfied than across the nations and regions, but otherwise dissatisfaction has increased broadly consistently across the UK, and across different levels of seniority

Workforce survey: Dissatisfaction with career progression, by employment status*

(% of respondents reporting being satisfied with their career progression)



N = [1]All (834), [2]Tenure of 3 years+ (743)

**Total excludes those reporting to be currently unemployed (N=249)*

Skills/training support paired with on-the-job training is crucial for a skilled and experienced workforce

Roughly two-thirds of industry interviews highlighted skills gaps resulting from individuals progressing in their career rapidly when the industry was busy without adequate training and experience, impacting the overall workforce quality. These gaps were perceived to be more prevalent among mid-to-senior level production and production management roles. There can be significant production risks from taking on individuals with skills gaps, with several interviews referencing production delays because of skill gaps.

One-third of interviews explicitly discussed the importance of on-the-job training opportunities to supplement educational resources, training or courses. Many interviewees used and emphasized the importance of industry-led resources, training and skills programmes, but highlighted that these need to be combined with a great deal of on-set experience. In-house training opportunities from major broadcasters are rapidly diminishing, creating a critical gap in long-term professional development. On-the-job training is increasingly relegated to short-term projects with tight budgets and deadlines, leaving little room for meaningful skill-building. Fewer commissions for multi-season, first-run TV shows (as opposed to single-season first-run TV shows, followed by a series renewal) further exacerbates the issue, making it difficult to invest in comprehensive training programmes within a production. As a result, mentorship is increasingly placed in the hands of temporary or freelance workers, rather than long-term staff who may provide consistent guidance across multiple seasons.

Soft skills, such as management, resilience and leadership skills were commonly cited as important cross-industry training requirements. ScreenSkills and other national or regional screen agencies were frequently praised for making such training available.

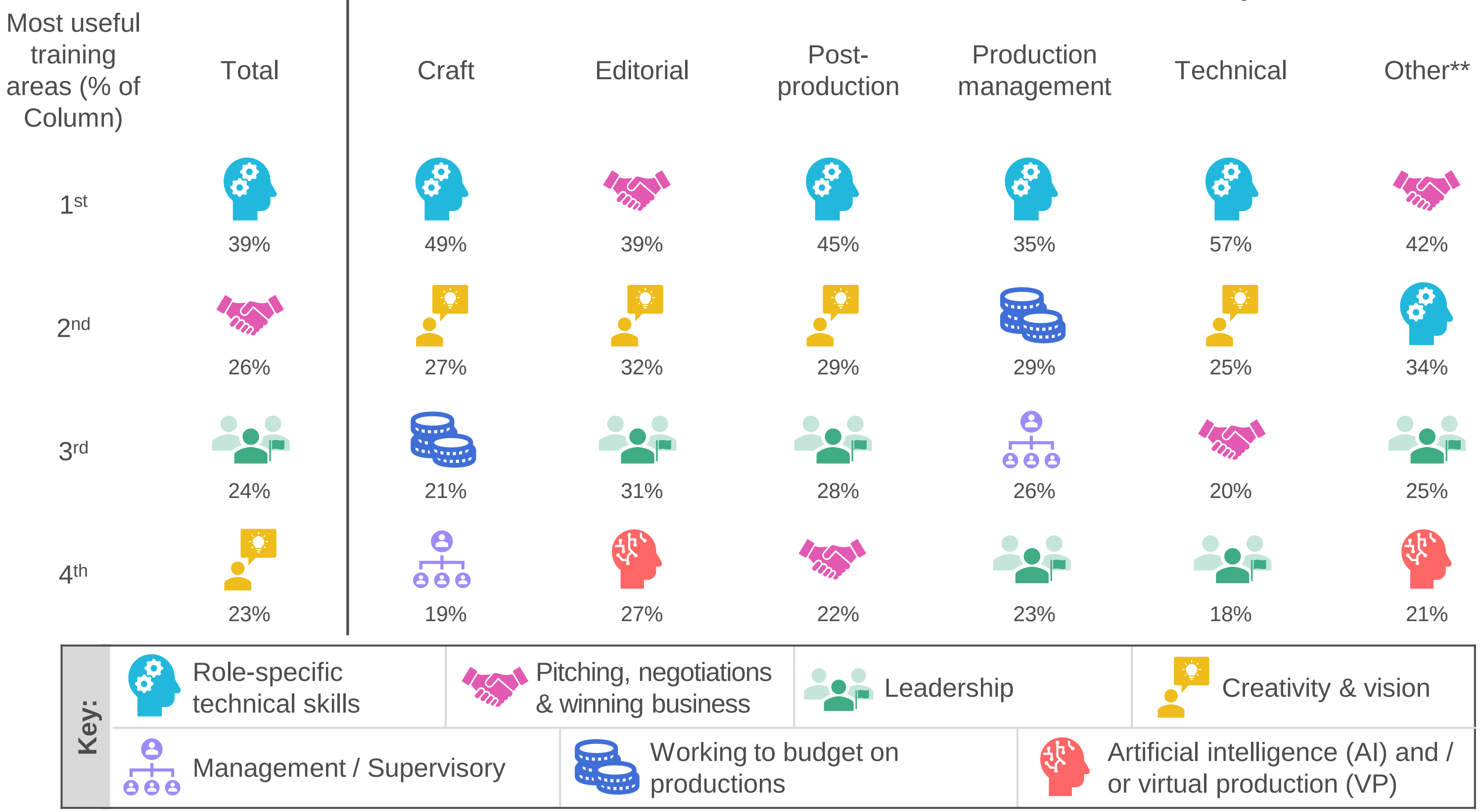
Interviews indicated a lack of a standardized framework for defining roles and experience, leading to difficulty in the hiring process. This stemmed from the broad use of job titles across roles and for the production of different types of content, and the overuse of credits instead of demonstrable skills or cross-sector experience in recruitment.

Increasing use of structured role taxonomies and job descriptions, and more consistent ways for recording and demonstrating experience with increased transferability and competencies, such as ScreenSkills Training Passport, would help to address these challenges.

Role-specific technical skills, pitching and leadership skills are the most-desired training areas

- For most departments, role-specific technical training (e.g. equipment operation, software usage and standard workflows to improve proficiency in an individual role) was flagged as the key area among workers seeking to advance their careers. For technical roles (cameras, lighting, location sound, etc.), role-specific technical training was particularly commonly selected, due to the nature of work and (as reported by producer interviews) technical skill gaps in these areas
- Training for pitching, negotiating and winning business was most requested among the editorial department, as well as other groups** captured by the survey.
- Training for Leadership and Creativity & Vision were also commonly selected across production departments
- Training for new technologies affecting the industry, such as artificial intelligence (AI) and / or virtual production (VP) fell outside the top requested area of training, but were common in certain segments. AI/VP training requests were particularly frequent among editorial (27%) and post-production (18%) workers

Workforce survey: Most useful areas of training* for those who seek to advance career in next 1-3 years



N = 927

*Other areas asked about include: Resilience, Planning & organisation, Advanced IT/software, Managing personal finances, Ability to receive/give feedback, DEI and anti-bullying/harassment, Teamworking, Client management, Presentation, General health & safety, and Numeracy

**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.

Local role demand illustrates how skills initiatives may need tailoring to different UK nations & regions

- The composition of the workforce varies across the UK's regions and nations, leaving different parts of the market exposed to different pressures, and potentially needing different skills training emphasis
- For instance, the Midlands & East England and North East, North West & Yorkshire workforces display a heavier skew towards technical workers (relative to – for instance – London's post-production-skewed workforce). With ongoing high demand for technical roles in the UK, role-specific training for jobs in this category (camera operation, lighting, sound) may be best centred around UK regional production hubs to support upskilling – several high-budget TV shows have shot in these locations including: *The Essex Serpent* (East of England) and *A Gentleman in Moscow* (North West)
- By contrast, role demand has dropped in areas such as Production Management and Editorial – roles for which the survey data indicates that the workforce across Scotland in particular overindexes, suggesting that skills initiatives in these parts of the UK may need to be more targeted at supporting adaptability of the workforce, enabling workers to more easily find roles outside their historic areas of core competence, and supporting the resilience of the local screen sector

Workforce survey: Overall region of residence and workforce profile by department – skew vs national average (%)

(highlighting indicates variance from the workforce total figure)

	Craft	Editorial	Post-production	Production management	Technical	Other*
Greater London	+29%	-8%	+26%	-23%	-14%	+11%
Midlands & East	-14%	-23%	-12%	+4%	+42%	+8%
NI & Wales**	-35%	+31%	-66%	+2%	-1%	+37%
North & Yorkshire	+14%	-7%	+1%	+11%	+18%	-40%
Scotland	-24%	+9%	-51%	+54%	-29%	-16%
South East	-37%	-3%	+8%	+2%	+13%	+25%
South West	-29%	+40%	-1%	+11%	+15%	-48%

Source: Workforce survey, N = 1010

**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

***Use with caution – low sub-sample sizes result in high margins of error (as a pilot study, sub-samples of less than 100 were achieved among some nations & regions)*

Rising and falling demand for specific content types will also influence national & regional skills needs

- The content types worked on reported by the workforce similarly skew across the UK's regions and nations, which leaves different parts of the market exposed to different pressures
- For instance, the South West workforce reported a heavier skew towards working on unscripted, animation and children's TV, leaving workers in the region particularly exposed to the current downturn in these content segments
- By contrast, the workforces in the North & Yorkshire, and Midlands & East, skew more heavily towards smaller-crew TV drama projects – an area where demand has been more consistent. Support in these regions – training for scripted-specific skills within roles – may be warranted

Workforce survey: Overall region of residence and workforce profile by content type – skew vs national average (%)

(highlighting indicates variance from the workforce total figure)

	Film (large-scale)	Film (small-crew)	TV (large-scale)	TV (small-crew)	Unscripted	Animation	Children's content
Greater London	+42%	+7%	+15%	-15%	-16%	-10%	-45%
Midlands & East	-1%	+5%	+8%	+27%	-27%	-22%	+1%
NI & Wales*	-5%	-3%	+6%	+50%	-17%	+6%	+38%
North & Yorkshire	-52%	+10%	-29%	+31%	-2%	-1%	+68%
Scotland	-60%	+0%	+3%	-5%	+18%	-23%	+33%
South East	-2%	-8%	-4%	-8%	-2%	+22%	-3%
South West	-33%	-43%	-40%	-30%	+104%	+68%	+42%

Source: Workforce survey, N = 1010

**Use with caution – low sub-sample sizes result in high margins of error (as a pilot study, sub-samples of less than 100 were achieved among some nations & regions)*

Regional & national mix of the workforce may necessitate a degree of tailoring of support initiatives

- While this research has unveiled a number of universal themes which are applicable across all regions – that skills gaps stemming from the commissioning boom exist across each region of the UK, that role-specific technical training is in high-demand among workers, and that DEI efforts face challenges relating to retention of newer workers – each region also has a unique composition which may require tailored support, or heavier emphasis on skills training focusing on certain roles or content types

- The map on the right illustrates the relative skews of each region, and where greater emphasis on certain training and skills needs may be necessary to further optimise support for the local workforce and production sector

- For instance, role demand for scripted TV (both small and large crew projects) has stabilised since 2023, while unscripted has slumped from its commissioning boom. As a result, workforces in regions including Scotland and the South West will face increasing retention pressure

- By contrast, in the North of England, Yorkshire, and in the Midlands and East, a proportionally heavier focus on scripted projects – and support for technical roles (where demand has remained strong across the UK) – is likely to require tailored initiatives to drive upskilling in existing areas for the local workforce

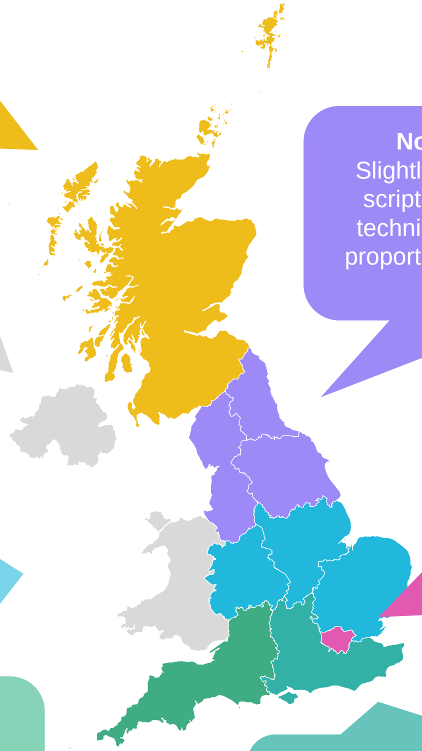
Workforce summary by nations & region – key themes

Scotland Workforce
Skews towards unscripted and children's TV projects. Recent decline in these categories may warrant emphasis on flexible and transferrable skills training

NI & Wales* Workforce
Training emphasis for Editorial roles may be needed, particularly in relation to small-crew scripted TV projects and Children's content

Midlands & East Workforce
Training emphasis for technical roles may be needed, particularly in relation to small- and large- scale scripted TV projects where overall UK demand has held reasonably steady in the last year

South West Workforce
Editorial, Production Management and Technical roles are proportionally more prevalent. But a heavy unscripted skew in the local production market is likely to drive retention challenges



North & Yorkshire Workforce
Slightly stronger focus on smaller-crew scripted TV projects, and in particular technical roles. Demand has remained proportionally more stable in these areas in the last year

London Workforce
Heavier skews towards craft, post-production and VFX roles, particularly in support of larger-scale film and TV. Craft and VFX workers in London may require more targeted skills support

South East Workforce
Broadly representative of the UK average in terms of the categories of titles and role demand – suggesting an even and broad approach to skills provision may be needed

**Use with caution – low sub-sample sizes result in high margins of error (as a pilot study, sub-samples of less than 100 were achieved among some nations & regions)*

Profile of the UK crew workforce

The sector faces regional, departmental and budgetary challenges in the drive to improve DEI. While positive trends are evident in the data and interviews, headwinds in the production market risk undermining recent progress.

This section breaks down the regional, departmental and DEI profile of the workforce

Age and seniority are the key driving factors behind diversity in the workforce. Entry/early-level respondents, and in some cases mid-level, over-indexed in terms of all diversity and inclusivity measures except regionality. Workers with disabilities are more concentrated in early to mid-level roles (53% compared to 44%), which could hinder efforts to boost their representation in senior positions due to the industry's greater employment challenges at these junior- and mid- levels.

Interviewees highlight improving gender representation, but senior roles still skew towards men – with 62% of male respondents in senior positions compared to 47% of women. Further, women in the workforce appear more concentrated in London (56%) and underrepresented in other regions (40-42%). The workforce in the craft department – which skews towards a younger, London-based workforce – has the greatest level of diversity in gender and sexual identities, while editorial and post-production skewed more towards heterosexual workers.

Social Mobility is a challenge within the sector – with 61% of respondents to the workforce survey coming from professional households, and only 31% from low- or working-class backgrounds. Editorial and post-production roles are heavily skewed towards professional and managerial backgrounds, while craft (again driven by the younger, London-based workforce), technical, and production management areas exhibiting more socio-economic diversity. Notably, post-production has the highest proportion (91%) of workers from non-paid school backgrounds, and Greater London lags in state school representation compared to other regions.

The UK regions workforce travels two to three times more frequently – 53% of the Regions workforce reported they frequently travel within the UK, led by 73% of respondents from Midlands & East and 52% from North & Yorkshire. This compares to 24% among those from Scotland and 26% from London. Survey responses suggest 42% of the workforce reside in Greater London, 40% reside in the Midlands & East, North & Yorkshire, South West and South East of England (roughly evenly split) and 18% from the UK nations (of which 11 % reside in Scotland). The profile of the workforce varies significantly, with 51% of the UK workforce in the craft and 50% of post-production department residing in London.

Industry perspectives on regionality and diversity largely aligned with workforce survey data

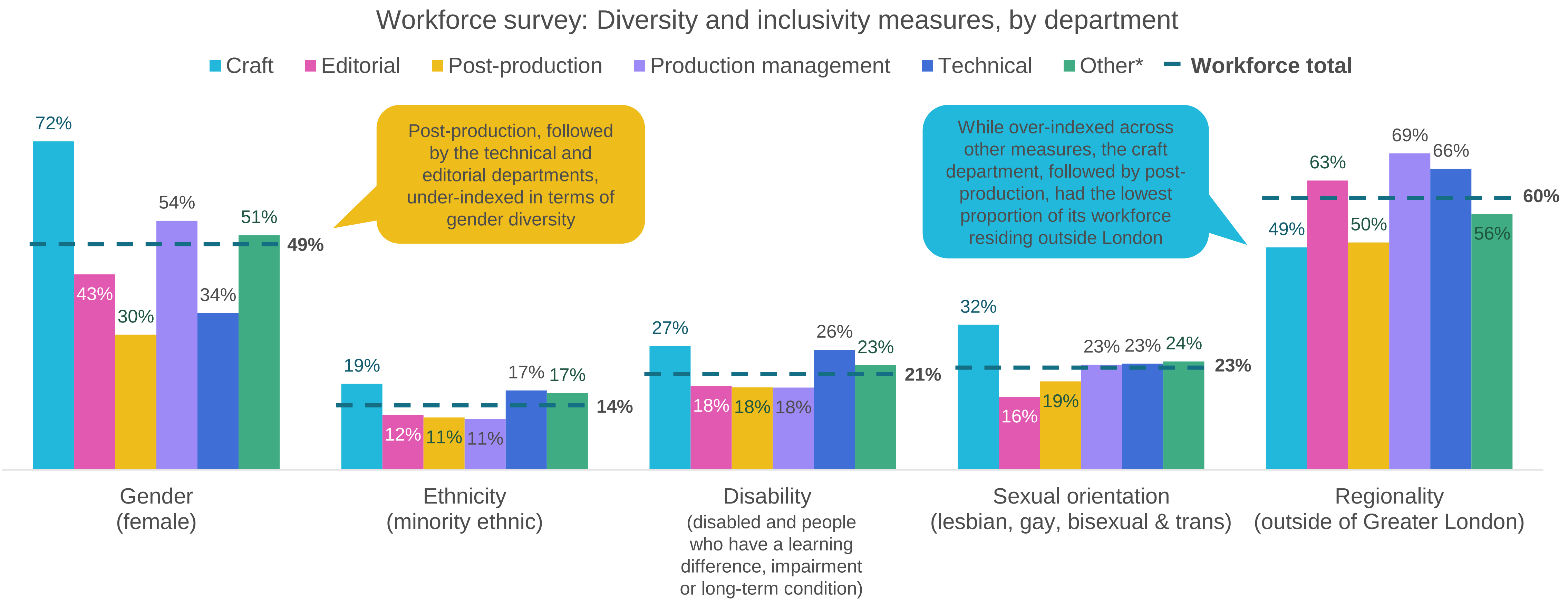
Industry perspective: Many interviewees emphasized the positive momentum in the industry in terms of DEI and expect this to continue as the junior talent of today progress in their careers, improving diversity in senior roles in the future. **However, interviewees also identified several common factors that continue to impact DEI in the workforce:**

- *Regional challenges* stem from recruiting skilled and experienced staff from the local workforce, impacting the ability to achieve ethnic and racial diversity targets. Across the UK Nations and Regions DEI efforts may be more challenged due to less diverse local populations and producers may opt to recruit diverse, non-local talent from outside the nation or region. This may be compounded in risk-averse scenarios, such as those resulting from the commissioning downturn, when a more experienced workforce is available outside of the region and when commissioners or executives may seek to attach more established and often London-based creative talent to a project. In London and Bristol, socio-economic diversity is a key challenge, where the workforces skew toward middle-class individuals.
- *Departmental challenges:* Some departments are heavily gender-skewed. Interviewees commonly identified technical roles being predominantly male, while hair, makeup, and costume are predominantly female
- *Budget constraints:* Limited budgets may restrict efforts to invest in mentorship, training programmes, and accessibility accommodations, especially on short-term productions
- *Content or genre:* Certain genres rely on specialist talent pools, limiting opportunities to diversify and introduce new talent. One example cited is unscripted content on particular subjects, which has historically relied on a workforce with a narrow demographic profile and high levels of formal education
- *Seniority:* Improving diversity in senior roles remains a significant challenge across all areas of production
- *Socio-economic:* Many interviewees highlighted socio-economic diversity as an important, but potentially overlooked, goal

Industry perspective: **Regional, departmental and/or systemic challenges are compounded by the current industry downturn, stifling long-term support for diverse talent.** During the post-pandemic commissioning boom, industry interviewees reported prioritising rapid hiring over DEI considerations as companies struggled to fill positions with experienced crew. Now fewer projects – typically with tighter budgets – are available and many producers may perceive hiring new talent and mentoring & training schemes as risks. This further contributes to producers relying on crew with known skills and experience, rather than recruiting local or diverse talent.

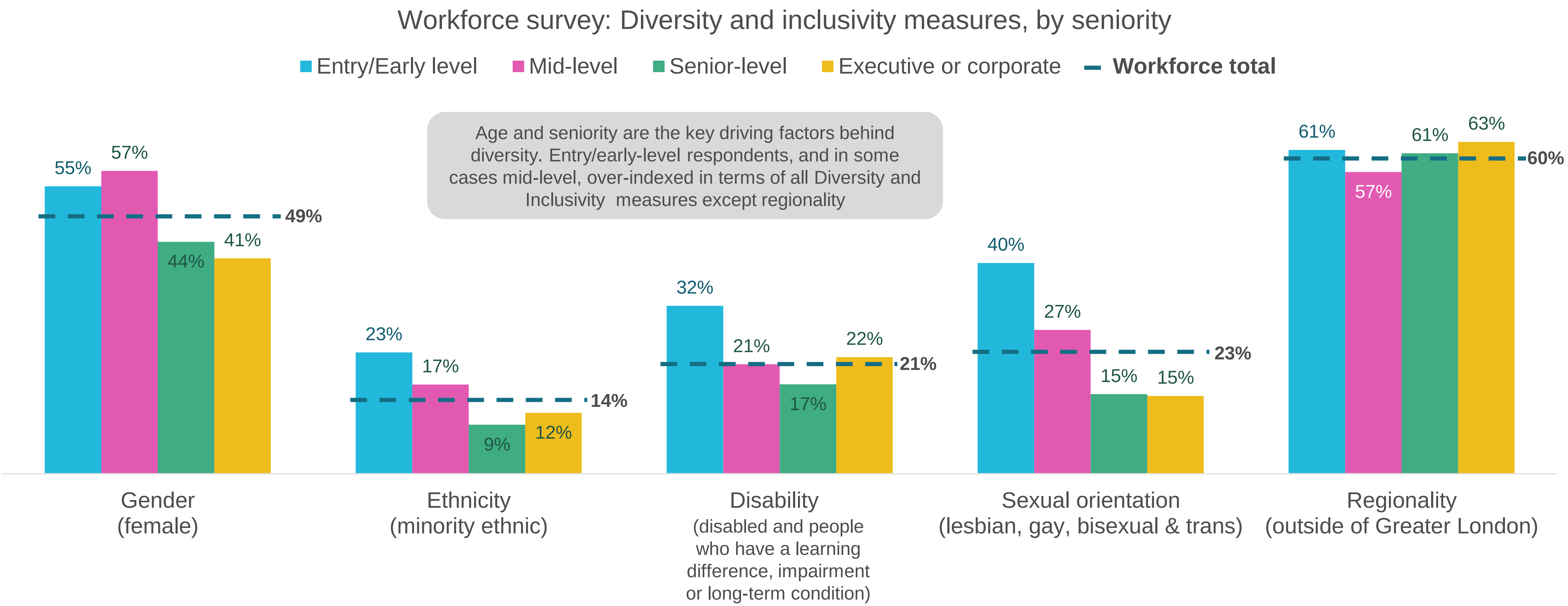
What is the diversity profile of the workforce?

Post-production and editorial departments may benefit from targeted DEI initiatives



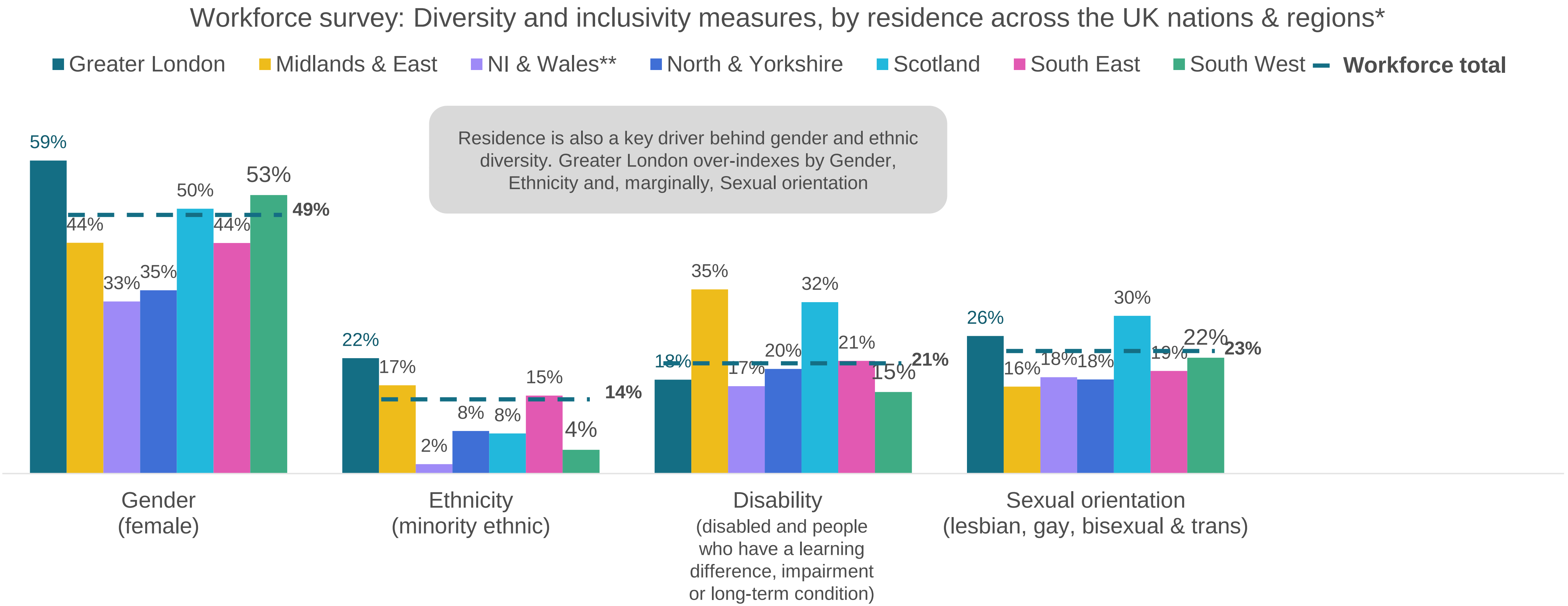
Workforce total represents the weighted sample average (N = 1083) across departments
**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*
All survey results are rebased to exclude 'Prefer not to say', Workforce total rate = 4%

Initiatives to support career growth of newer workers would support future diversity in senior positions



Workforce total represents the weighted sample average (N = 1083) across seniority levels
All survey results are rebased to exclude 'Prefer not to say', Workforce total rate = 4%

Workforce gender and ethnic diversity differ inside and outside Greater London



Workforce total represents the weighted sample average (N = 1083) across seniority levels

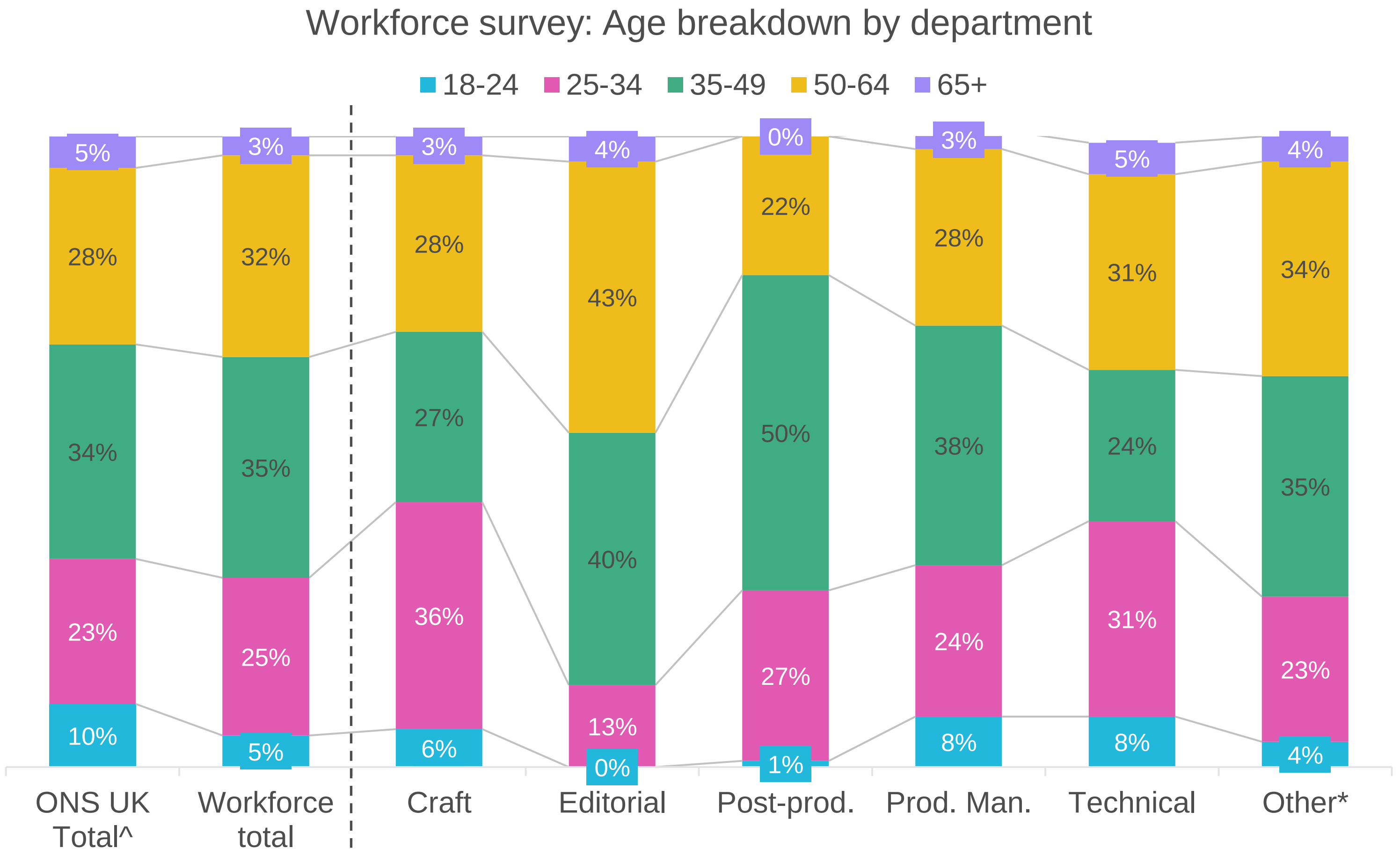
All survey results are rebased to exclude 'Prefer not to say', Workforce total rate = 4%

** UK Nations (Northern Ireland, Scotland, Wales) & Regions (East Midlands, East of England, North East England, North West England, South East England, South West England, West Midlands & Yorkshire and the Humber)*

***Use with caution – low sub-sample sizes result in high margins of error (as a pilot study, sub-samples of less than 100 were achieved among some nations & regions)*

The editorial department skews oldest; craft & technical skew most towards under 35s

- The editorial department workforce represents the oldest-skewing department, with 87% of respondents aged 35 or older, relative to 70% in the wider screen workforce. Craft and technical were the departments best represented by younger workers (in the 18-24 and 25-34 brackets)
- The workforce across the English regions also skews slightly older than the average worker, with 77% of respondents aged 35+. Across content types, younger respondents more commonly worked on high-budget film (40% aged under 35 vs a survey average of 30%) and TV (35% were aged under 35) while the respondents working on unscripted content were typically older (77% aged over 35 vs a sample average of 70%)
- There is a strong correlation between age and reported seniority levels, with mid-career age groups seeing the broadest spread across seniority level. Almost all respondents aged 18-24 were entry-level, and executive or corporate management levels were principally among the older age brackets



N = 1083

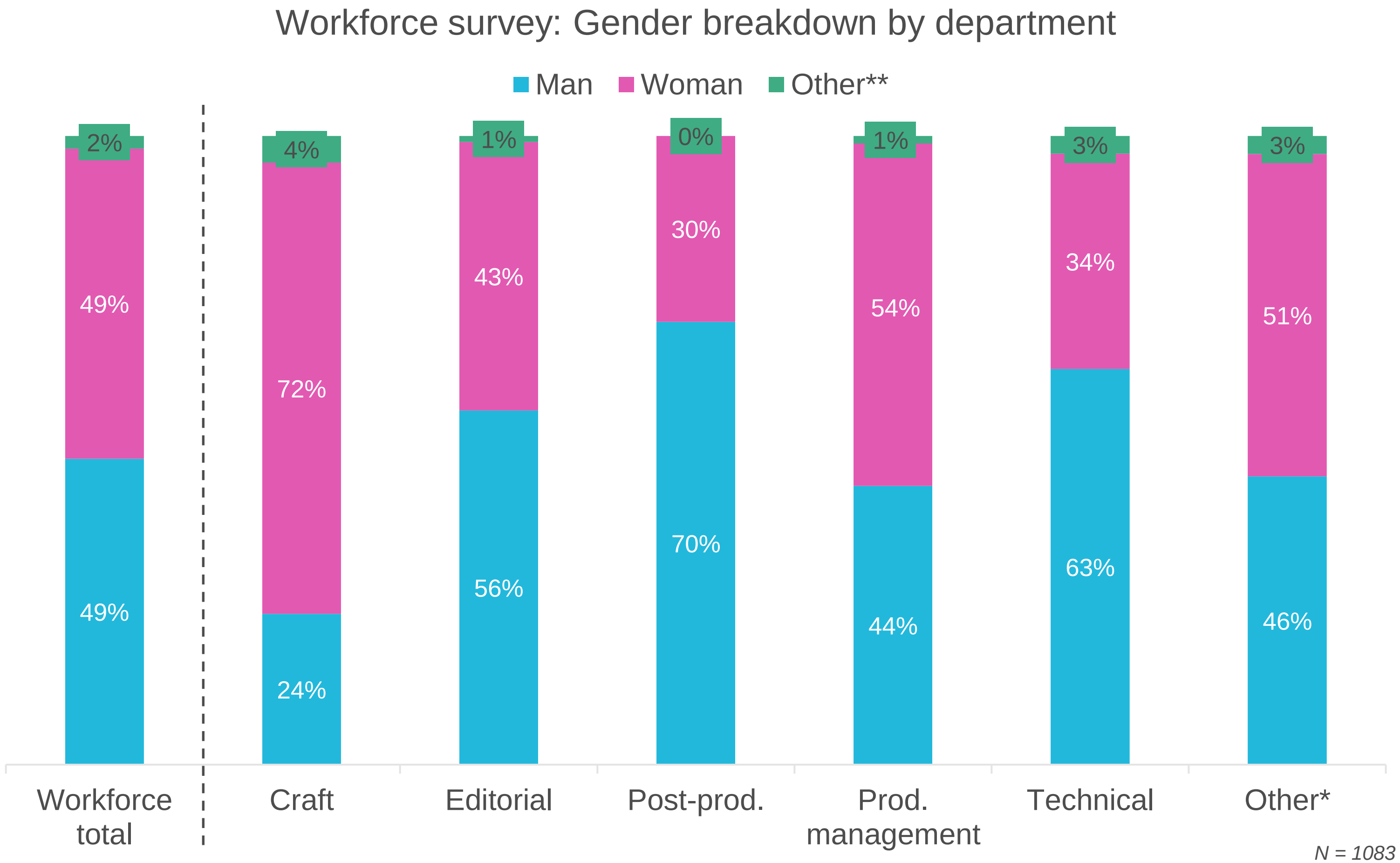
**Other groups include animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

^Source: ONS Labour Force Survey (LFS) estimates for the employment circumstances of the UK population as of Oct-Dec 2024

Editorial, post-production & technical skew male; craft & production management female

- Women are more likely to hold positions with craft and production management roles. By contrast, the survey revealed a heavy skew towards men across post-production as well technical roles, and a smaller skew in editorial, marrying with industry interview feedback
- Around 2% of the workforce identified their gender as intersex, non-binary or preferring to self-describe
- The overall response rate for the workforce survey was 50% Man and 50% Woman (after rebasing to exclude other identifications), which compares with 52% Male and 48% Female per ONS UK employment data

Industry perspective: Interviewees highlighted the gender imbalance across departments, noting it leads producers to manage gender diversity in totality across departments rather than *within* each department, suggesting initiatives driving DEI need to be more finely targeted at specific departments where there are known barriers to entry or progression



N = 1083

**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

***Other genders include Intersex, Non-binary and Prefer to self-describe*

Data rebased to exclude 'Prefer not to say', Workforce total rate = 5%

Interviews highlight improving gender representation, but senior roles still skew towards men

- Positions of higher seniority are currently more likely to be held by men, with 62% of male respondents reporting a Senior-level, Executive or Corporate role or above, compared to 47% of women
- This gender skew aligns with feedback from several interviews with companies in the industry, but ongoing improvements to increase the representation of women at higher levels were also highlighted
- The workforce survey results also suggest that women working in the industry are largely based in London (with 59% of respondents from London identifying as women), and that women may be under-represented among the North & Yorkshire workforce (35%)

Industry perspective: Interviewees acknowledged the gender imbalance across levels of seniority, but noted some improvements in entry- and mid-level roles and were optimistic about the changes in diversity in the industry. However, momentum hinges on more junior workers being retained in the sector during the current downturn

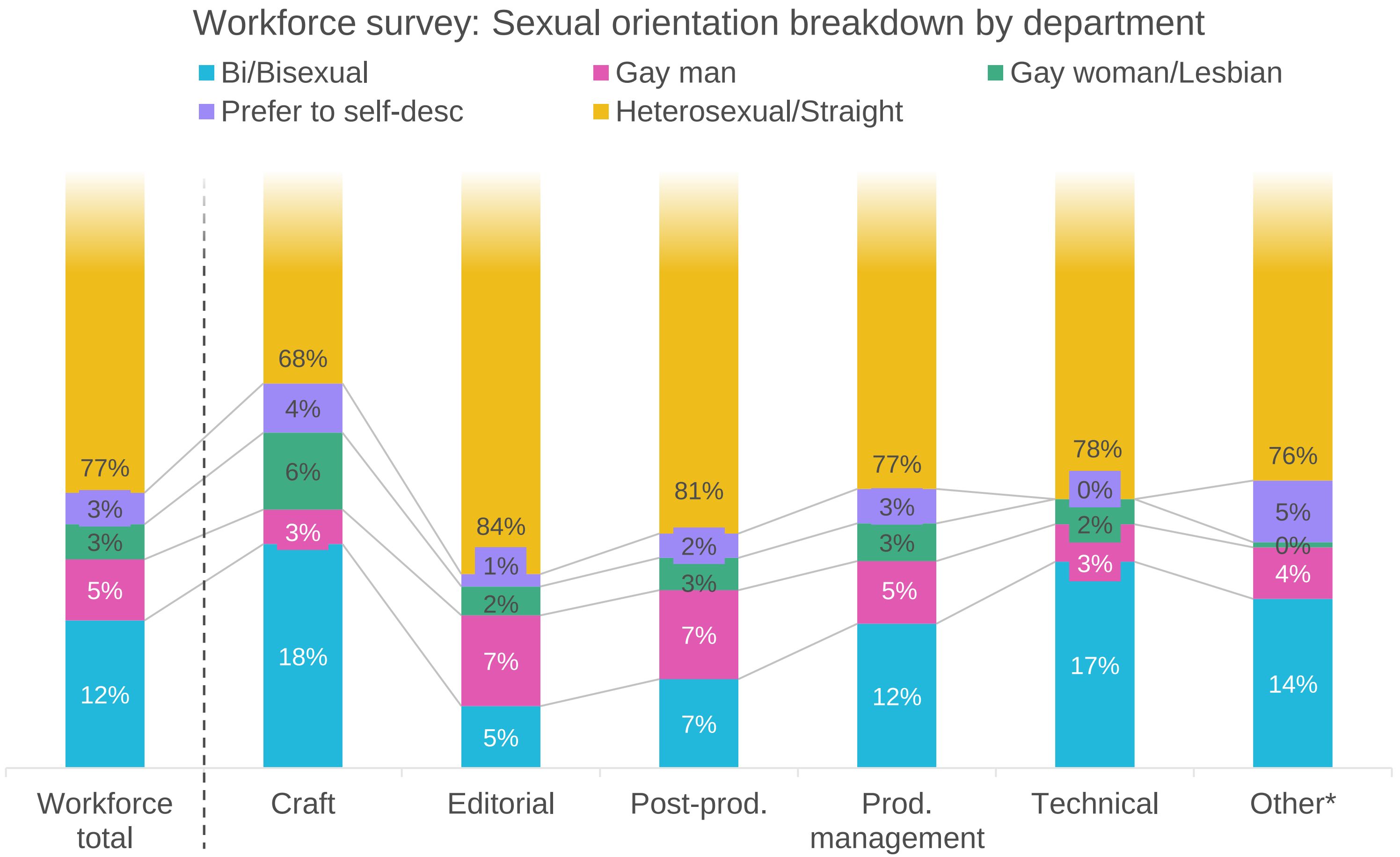
Workforce survey: Seniority breakdown by gender

N = 1083

** Other included respondents that selected Intersex, Non-binary, Prefer not to say or self-described as another gender*

The craft department shows the greatest diversity in sexual identities among departments

- Across all departments, 23% of the workforce identified as bi/bisexual, gay man, gay woman/lesbian or preferring to self-describe (and in a separate question, 1% identified as trans or preferring to self-describe). This exceeds the ScreenSkills targeted participation rate of 10% for the initiatives it supports, as well as UK population averages of 4.5%^
- The craft department – which skews towards a younger, London-based workforce – has the greatest level of diversity, while editorial and post-production skewed more towards heterosexual workers
- 59% of heterosexual/straight respondents reported being at senior-level and above, compared to 35% of non-heterosexuals; however, the latter groups is heavily skewed to 18-39-year-olds, who being younger, correlate to less-senior profiles. Within the 18-39 age group, non-heterosexual/straight respondents also skew more towards early roles (40% compared to 27% of non-heterosexual/straight respondents)



Note: full height of the Heterosexual/Straight category not shown; N = 1083. Data rebased to exclude 'Prefer not to say', Workforce total rate = 12%

**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

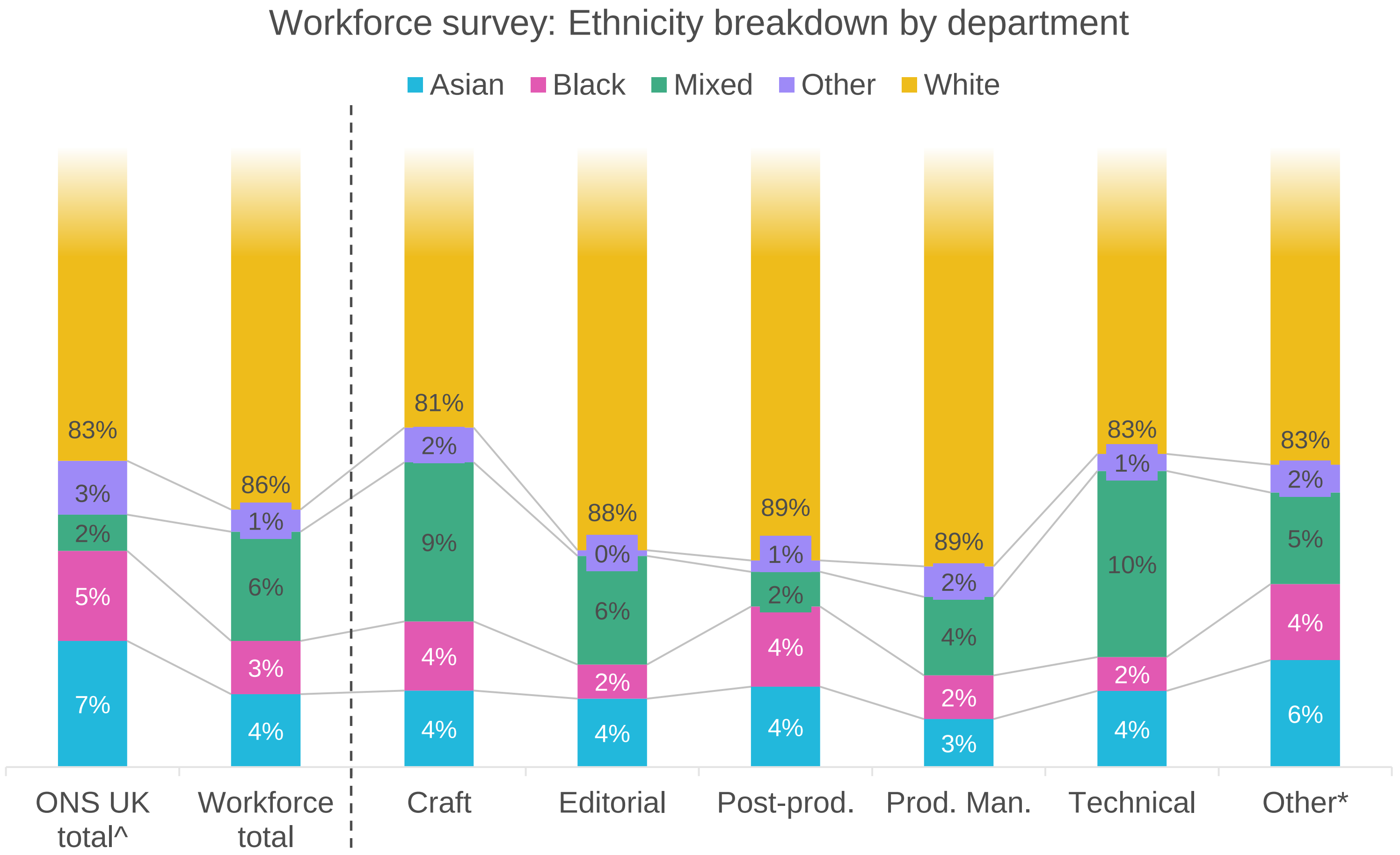
^Source: ONS Annual Population Survey (APS) estimates for the Sexual orientation of the UK household population aged 16 years and over, 2021

Craft & technical also present the more ethnically-diverse departments, driven by junior workers

- Respondents from Asian, Black, Mixed or other ethnic groups represented 14% of workforce survey respondents, compared to 13.4% of off-screen contributions to the 2022/23 CDN Diamond report and 17% of the UK employment base (per the ONS LFS). This suggests current ethnic minority representation in the sector is behind the total UK workforce and ScreenSkills' target participation rate of 20%

- The craft and technical departments are the most ethnically diverse, with 19% and 17% of workers, respectively, of Asian, Black, Mixed or Other ethnicities, whereas editorial, post-production and production management skew more strongly towards a White workforce

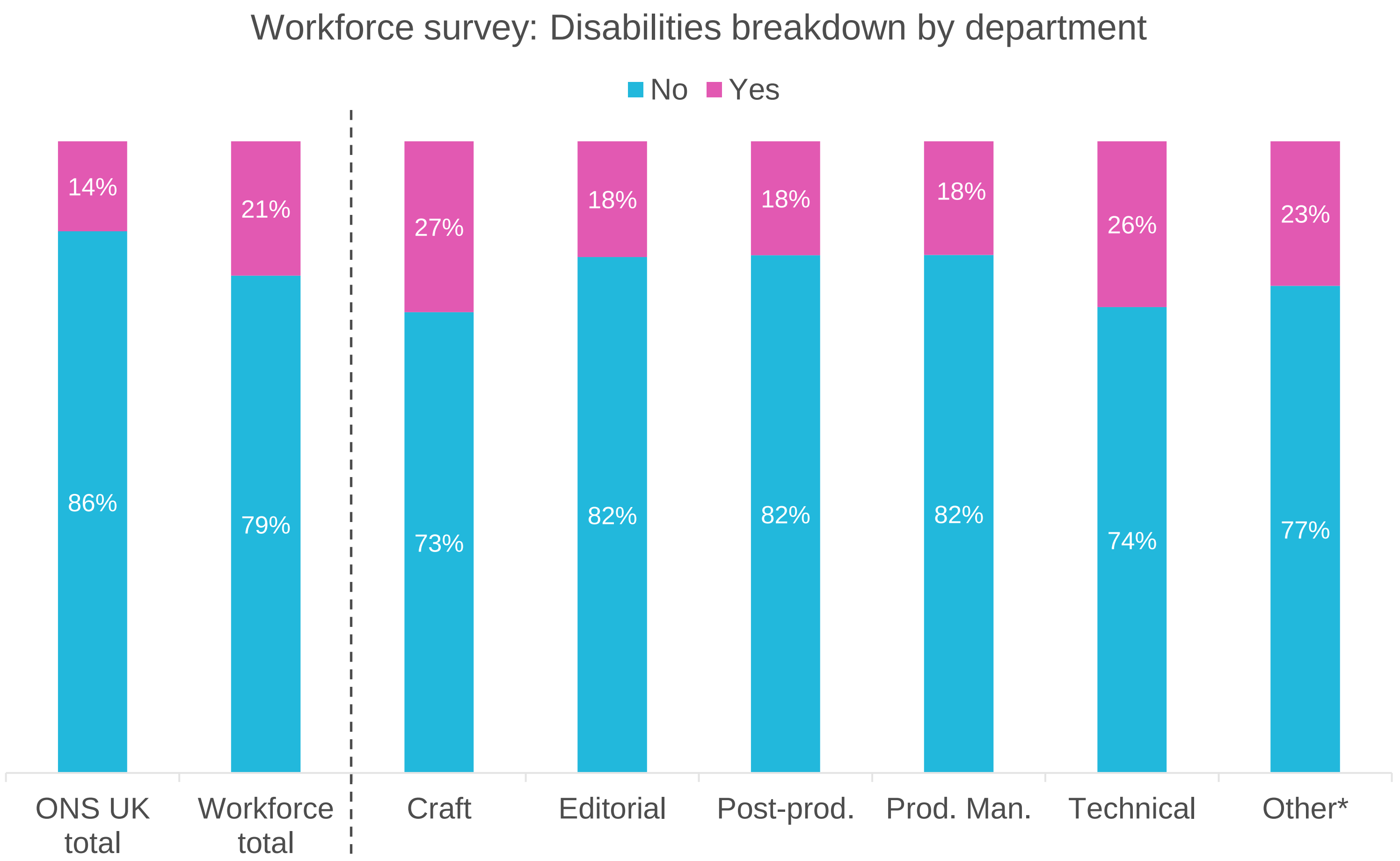
- The skew in the craft and technical departments appears driven by the large proportion of younger, or junior and mid-level workers, who are typically more diverse. At a senior-level or above, these departments appear less diverse than others



Note: full height of the White category not shown; N = 1083. Data rebased to exclude 'Prefer not to say', Workforce total rate = 5%
**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*
^Source: ONS Labour Force Survey (LFS) estimates for Oct-Dec 2024

Craft & technical also have a greater proportion of workers who have a disability…

- 21% of the workforce reported having a disability, impairment, learning difference or long-term condition. This compares to 8% of off-screen contributions to the 2022/23 CDN Diamond report and 14% of the general UK employment base (per ONS), and ScreenSkills' initiative participation-rate target of 10%
- Specific learning differences such as dyslexia, dyspraxia or AD(H)D were the most commonly-reported conditions, representing half of respondents with a disability. Mental health conditions were second-most common (31%), followed by long-standing illnesses or health conditions (21%) and social/communication impairments such as ASD (20%)
- Across the seniority ladder, workers with a disability skew more towards early-mid level roles (53%, vs. 44% of those without a disability). This poses a risk to efforts to improve representation of people with disabilities, given the greater employment challenges faced in the industry by individuals at these levels.



N = 1083

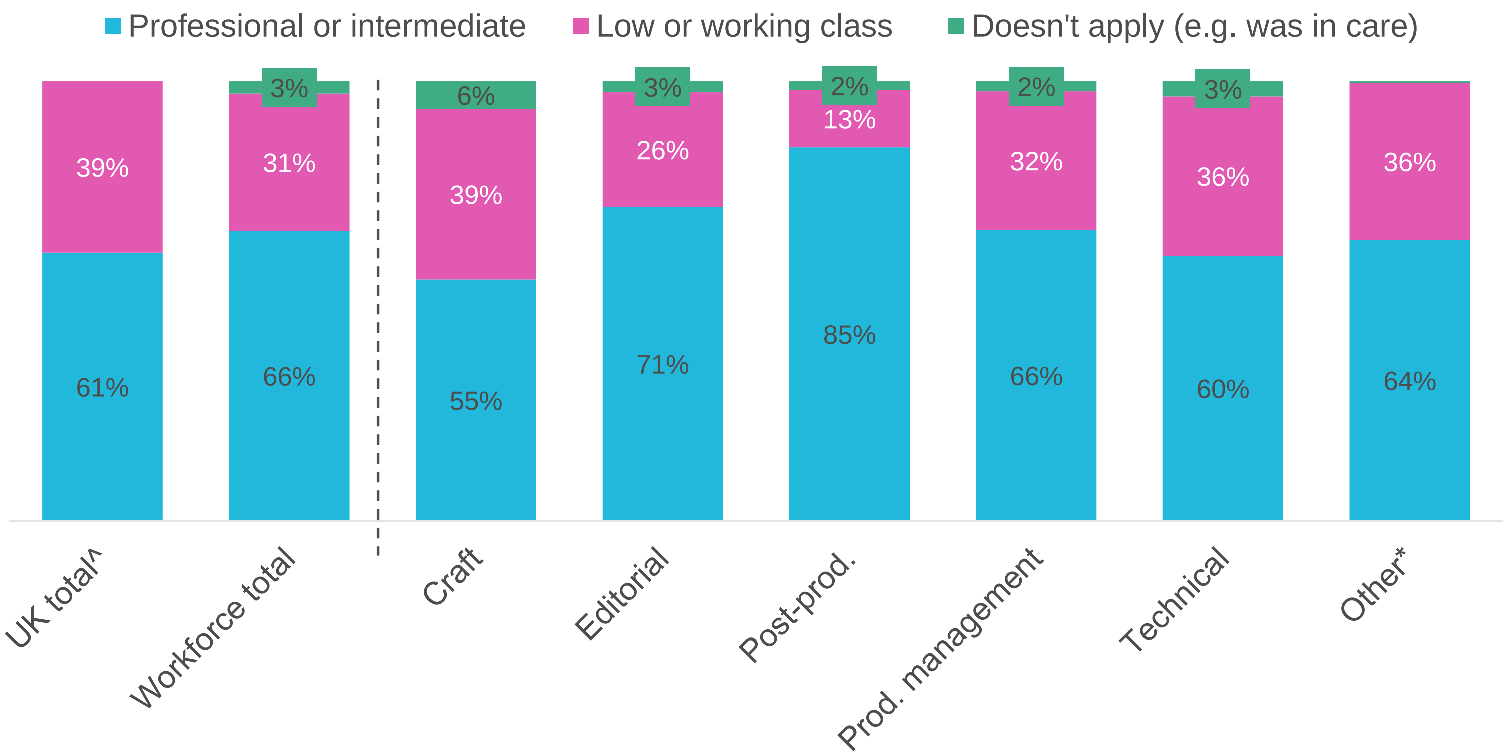
**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

Data rebased to exclude 'Prefer not to say', Workforce total rate = 9%

Craft & technical departments also have greater representation from diverse social backgrounds

- 66% of the total workforce reported being from a Professional or Intermediate household (i.e. modern and traditional professional occupations, senior manages and administrators, and middle or junior managers), skewed further to 73% within London. Overall, only 31% come from low- or working-class households
- Editorial and post-production skew more towards Professional & Managerial backgrounds, suggesting there is scope to improve opportunities for social mobility in these areas
- Craft (45%), technical (40%) and production management (34%) are best represented by workers from diverse social backgrounds**
- Though post-production is among the least-representative in terms of the primary caregiver's occupation, it does have the greatest proportion of workers from non-paid school backgrounds (not shown, inc. international schools), at 91% (compared to 83% of the total workforce). Greater London under-indexes for respondents that went to state schools (56%, vs. 75% for Regions and Nations)

Workforce survey: Socioeconomic background (primary caregiver's occupation) breakdown by department

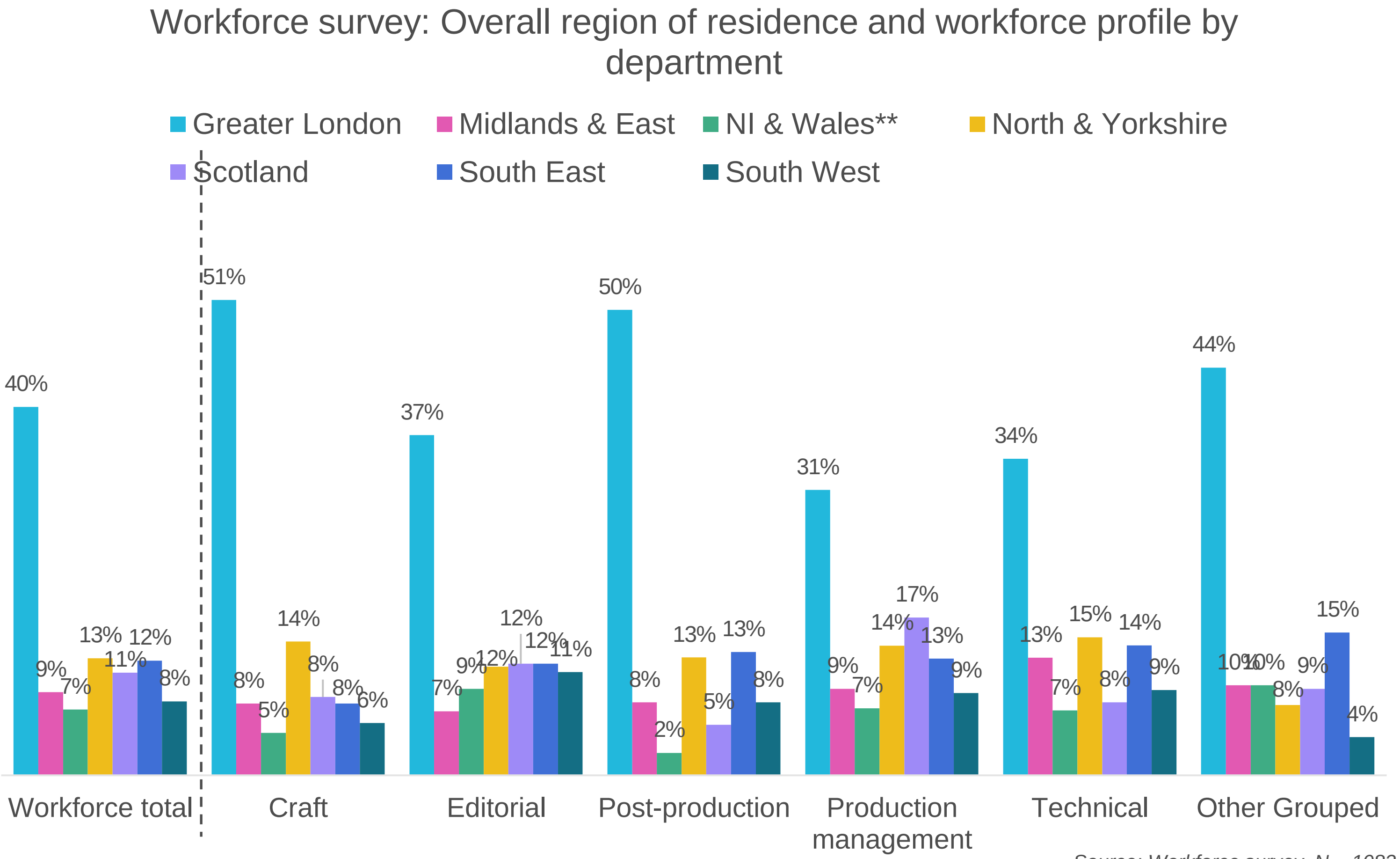


N = 1083, Data rebased to exclude 'Prefer not to say', Workforce total rate = 7%
^ Source: Social Mobility Commission, 2021
**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*
***'Diverse employment types' refers to Low or working class backgrounds and 'Doesn't apply (per ScreenSkills' diversity-monitoring classification)*

The production management, technical and editorial workforces skew outside of London

- Greater London accounted for the largest single portion of the workforce, representing 43% of those surveyed. The South East is the next largest regional workforce at 12%. These results align closely with the regional breakdown by SIC code which has 42% of the workforce based in London

- The profiles of the workforce vary significantly cross the UK, over 50% of the Post-Production and Craft workforce reside in Greater London whereas only 33% of Production Management workers reside there. Most areas see a similar proportion to the total across departments, Scotland shows the biggest variance with a high of 18% of the Production Management workforce but only 6% and 8% of the Post-Production and Technical workforce, respectively.



Source: Workforce survey, N = 1083

**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

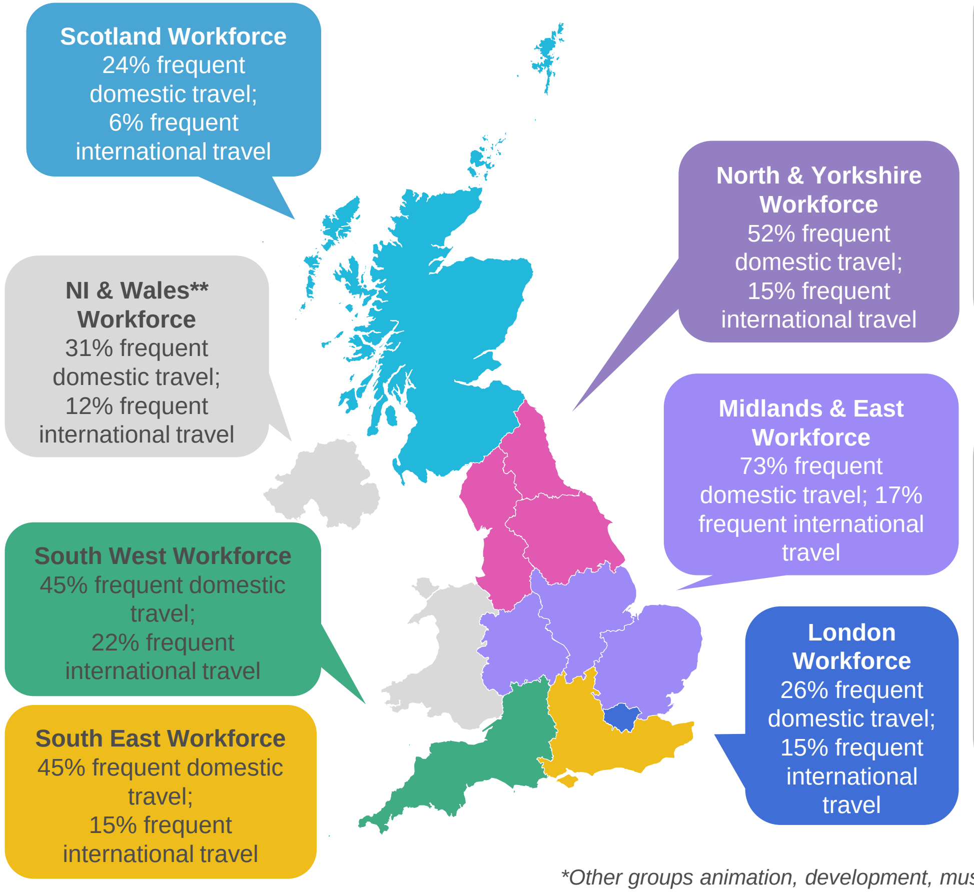
***Use with caution – low sub-sample sizes result in high margins of error (as a pilot study, sub-samples of less than 100 were achieved among some nations & regions)*

The Regions workforce, led by those in the Midlands & East, are twice as likely to travel for work

- When asked about travelling for production roles, the Greater London and Scotland workforce reported the least amount of domestic travel at 26% and 24% respectively, however they differed on international travel with workers from Greater London over twice as likely to travel outside the UK at 15% compared to Scotland's 6% - which is the lowest throughout the UK. The Midlands and East Workforce were the most likely to frequently travel with 73% reporting, elsewhere the figure ranged from 45%-52% Internationally travel was most frequent in the South West Workforce at 22% and elsewhere was consistent with the Great London workforce ranging from 15%-17%.

- Across departments – workers in the editorial and technical departments are also most likely to travel frequently for work, both within the UK and abroad. Respondents across the craft and post-production workforces reported the least amount of travel

Workforce survey: Travel frequency, by region of residence



% UK workforce that frequently travel domestically, by department

Technical	52%
Editorial	49%
Production management	37%
Craft	32%
Other*	32%
Post-production	18%

% UK workforce that frequently travel internationally, by department

Editorial	24%
Technical	21%
Other*	15%
Craft	10%
Production management	10%
Post-production	5%

Source: Workforce survey, N = 1083

**Other groups animation, development, music, stunts & special effects, VFX/VP, writing, Other/Misc.*

***Use with caution – low sub-sample sizes result in high margins of error (as a pilot study, sub-samples of less than 100 were achieved among some nations & regions)*

Consistent DEI requirements and industry-wide support may support on certain challenges

Industry perspective: Producers struggle to manage variable DEI considerations and requirements across productions. Many interviews highlighted the significant variation in DEI requirements of different commissioning partners – for instance UK, US or European partners – in relation to comprehensive diversity statements, regional/local employment and DEI targets, as well as the extent to which such requirements may apply to both the on- and off-screen workforce. Interviewees felt that the onus was on producers to navigate these complex and variable requirements across productions, with varying degrees of support from the commissioning partner – impacting hiring strategy and investment.

Industry perspective: Interviewees expressed further difficulties balancing DEI targets across ethnicity, gender, locality, and disabilities, among other areas. Hiring from local talent pools may conflict with broader DEI efforts across ethnic, socioeconomic, class, or disability representation. In these instances, producers often find they have to choose between distinct DEI targets on a production, for example recruiting talent from outside the region to meet diversity quotas, potentially at the expense of local talent.

Industry perspective: Several interviews praised the role of Access Coordinators, sometimes provided by the broadcaster/commissioner or industry bodies like ScreenSkills. These roles make it easier for production companies to cater for people with disabilities, manage accessibility and neurodiversity requirements, and support other related requests from cast and crew

The industry can support producers' DEI efforts by providing **clearer, centralized guidance** tailored to regions and production types, helping balance local hiring with broader diversity goals.

While valuable resources from BAFTA, PACT, and BECTU exist, producers still face challenges in areas with limited talent pools.

Expanding initiatives like access coordinators and on-the-job training programmes—widely praised by industry professionals—would further aid productions in achieving meaningful inclusion.

Source: Industry interviews

Findings & recommendations

A variety of initiatives aimed at supporting workforce mobility, ensuring junior workers have opportunity to progress, and focusing on specific departments, are key to supporting workforce retention and DEI progress

Closing skills gaps & maintaining DEI support are key amid industry downturn and workforce pressures

Volatility in the UK television industry has driven a series of workforce-related challenges. The growth in the volume of projects in 2021 and 2022 drove high demand for screen workers, resulting in a rapid expansion in the number of people employed in the industry. This expansion drove fast promotion of junior talent, and an influx of new entrants, resulting in skills gaps. Since 2022, economic challenges, the effects of the Hollywood strikes, and a cut-back in streamer commissioning, have reversed much of this growth. The 200,000-strong workforce is now under-employed, with many struggling to find roles. This downturn is being felt particularly keenly at junior to mid levels, with particular implications for DEI. Skills and training initiatives focusing on retention of junior workers will be key to ensuring that DEI gains from the last few years are not reversed by junior workers leaving the sector.

While an underutilized workforce might theoretically offer producers their choice of candidates for roles, in reality skills gaps persist. This is a result of two factors. The first is that the rapid promotions and workforce expansion in 2022 has led to a broadened workforce with on-paper experience, but gaps in their practical knowledge. The second is that a high degree of specialization from the workforce means certain genres and content types may still be encountering high workforce demand – for instance high budget scripted TV. Closing role-specific technical skills gaps (i.e. those skills core for each individual role) would help to meet industry desires for a more capable workforce, and support workers in their desire for career advancement. Transferable skills training would also support a greater degree of workforce mobility, which may help to alleviate workforce pressures in high demand areas, as well as offering those struggling to find work a greater range of potential roles.

Many of the pressures and challenges faced by the industry were reflected in the workforce survey to a comparable degree across London and the Regions & Nations. Workforces in each geographical area expressed similar sentiments around access to employment and desires for training and upskilling. However, the Regions & Nations face different DEI challenges to London – potentially requiring producers to trade-off hiring locally or widening their geographic recruiting pool to support the recruitment of diverse talent. Workers in the Regions & Nations already travel to a greater degree than those in London. Clear, centralized DEI guidance, tailored to each geographic area, would marry with the desires of producers across the UK to manage the balancing of DEI goals with local hiring initiatives.

Further research is needed to anticipate future workforce challenges and improve regional visibility

Further work needs to be done to improve data collection and reporting across the UK in order to analyse the local, regional and transitory workforces. While there are pockets of data and research held in some regions, a more comprehensive framework is required. This may include regional tracking of the relevant locations for each production and the associated cast and crew, in order to more comprehensively map the production workforce and its location. This would enable the industry to then distinctly analyse the workforce from a geographical standpoint, allowing for specific analysis of geographic-specific pressures on both the workforce, and on producers.

Future studies replicating the approach pioneered by this study will allow for ongoing tracking of the size and scale of the workforce, and support training and policy initiatives. A powerful extension would be the addition of demand forecasting for the workforce. By considering the relationship between the production landscape and the health of commissioners and other key funding pools, future demand estimates for categories of titles and the associated workforce can be generated. This would support producers, policy makers, industry bodies, and other screen sector stakeholders to better plan for the near-term future. This may allow stakeholders to then anticipate future pinch points for the workforce, and target or adjust training and support regimes appropriately.

Local screen bodies may wish to commission targeted research into local workforce demographics to better understand regional talent variations. This would provide valuable insights to inform more nuanced DEI target-setting for local productions, ensuring efforts are reflective of the local workforce and its diversity. ScreenSkills may be well placed to engage national and regional bodies to develop a consistent centralized mechanism for such research.

Annex: Crew workforce modelling methodology

This section provides additional detail on the process used to estimate the size of the workforce, illustrating sources and assumptions

Corresponding to each modelling step

Modelling: Ampere has extrapolated the crew workforce from credited roles on ~6000 UK productions

- Ampere has identified any film & TV titles that have been mainly produced or financed in the UK and had a first release during 2022 – 2024. For each UK production identified, crew information has been collected from third party databases. A variety of databases were reviewed during the project – including IMDb, The Knowledge, film & Television Industry Alliance, Mandy UK, filming in England and various similar national/regional crew directories
- IMDb was the most comprehensive and authoritative source for global film and television credits. Ampere's research found that most other sources suffered from the self-submission nature of these databases and no editorial process
- Ampere's Commissioning data has identified additional UK titles currently in production, and additional metadata, such as title announcement dates. This data is collected by the Ampere team directly from announcements by commissioners and producers
- Modelling and extrapolations have been made where no data is publicly available (e.g., for titles currently in production), to account for under-credited roles, and to further allocate production activities over time. All assumptions here draw from industry interviews and a UK workforce survey with over 1000 respondents
- The rest of this section details the methodology of, and outputs from, the modelling process

Overview of modelling methodology

1 Industry data collection for UK productions

- Identifying UK productions released by UK broadcasters, streamers, film studios, etc.
- Data collection for title information and detailed crew information

2 Title matching with Ampere's Commissioning data

- Ampere's Commissioning data tracks content commissioning and production activities, allowing for titles currently in production with no announced release date to be included, and provides proxy timelines for content production

3 Title segmentation by content type

- Content types have been used to identify UK productions with similar production timelines and activities, allowing for extrapolations to be made where no published data exists

4 Workforce and production activity estimates

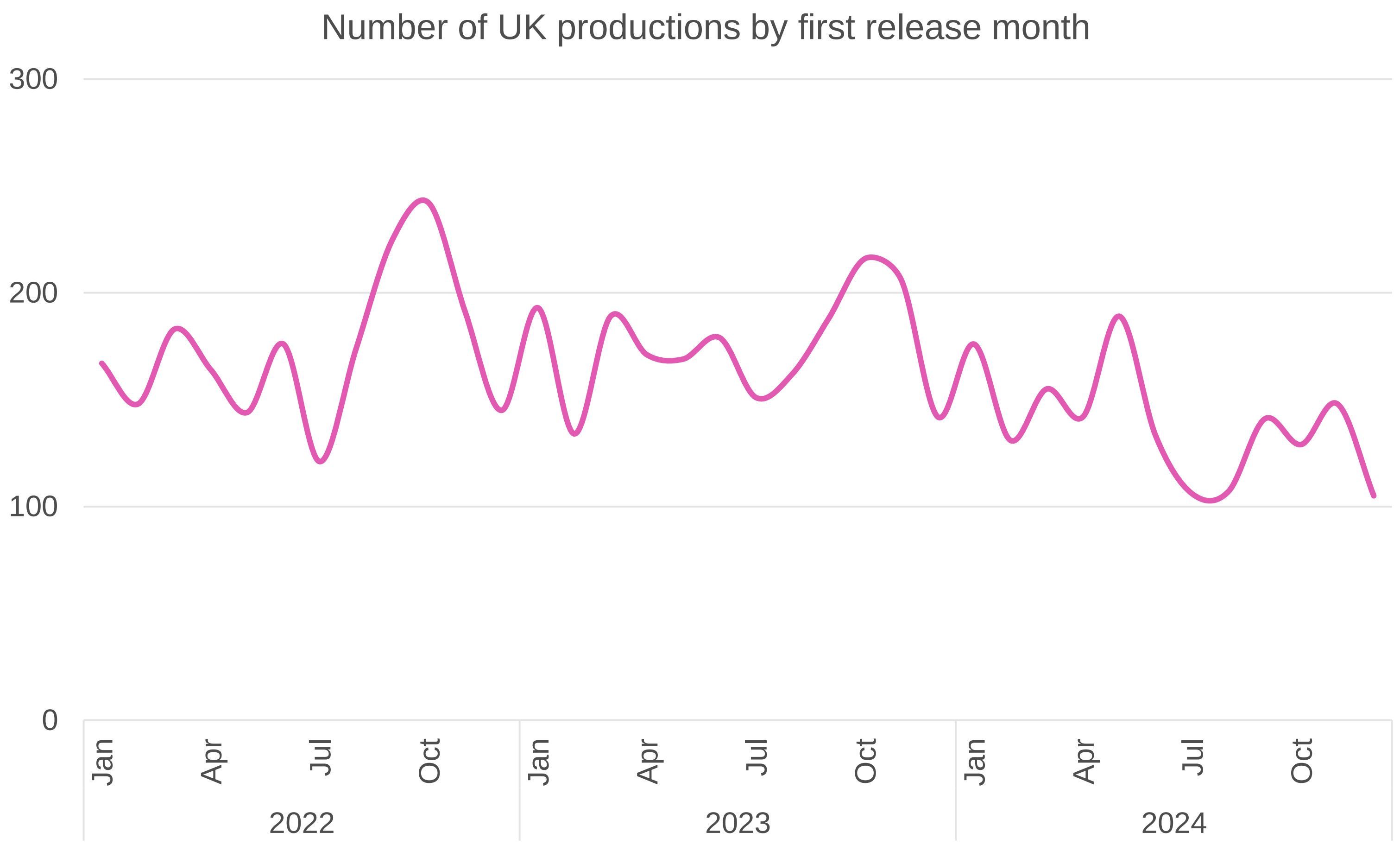
- Present day snapshot of the size and profile of the workforce
- Activity & capacity estimates of the workforce, based on the production output

1

Modelling: Almost 6000 UK productions of film & TV titles were identified as releasing over 2022-24

- Almost 6000 titles have been identified as a UK production for this study. This includes any film & TV titles that have been mainly produced or financed in the UK and had a first release during 2022 – 2024. However, this excludes non-traditional film & TV content formats, such as short films, educational programming and promotional clips

- This catalogue presents a complete picture of the UK film & TV production output, including:
  - major broadcasters, independent production companies, and co-productions with international studios with UK operations
  - high-, medium- and low-budget productions
  - Productions made for traditional TV networks, streaming platforms, and for theatrical release
  - International co-productions with significant contributions made from the UK (e.g. financing, locations, production workforces)



N=5842 film & TV titles

Source: Ampere analysis of IMDB data

1

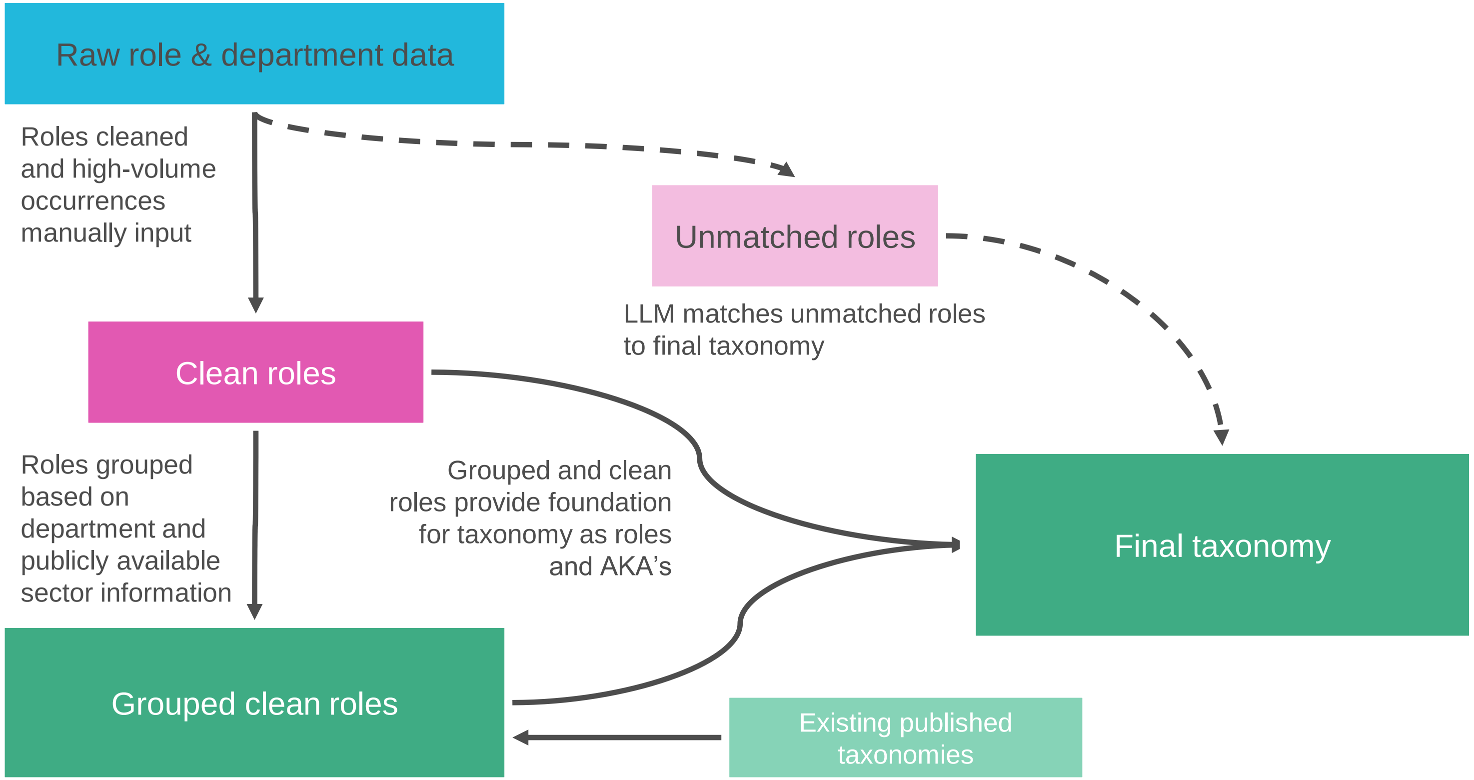
Modelling: Over 350,000 roles were classified into a unified taxonomy for analysing production activities

- For the collected crew information, text cleaning was applied to simplify the production role titles and commonly occurring roles (i.e. those credited 50 or more times over 2022-2024) were normalised into a 'Clean role' accounting for slight discrepancies in role titles (e.g. 1st Assistant Sound vs. First Assistant Sound)

- Clean roles were then manually grouped based on published alternative job titles and existing taxonomies. Existing taxonomies mapped into this work include as ScreenSkills' job profiles and the BFI's Crew Mapping framework developed by Olsberg SPI, among other screen sector industry bodies – which typically offer detailed role descriptions, alternate role titles and departmental information. This ensures that the final taxonomy is reflective of credited roles from published data sources, and the industry's perspective as mapped across existing role taxonomies

- Less common roles (i.e. those credited less than 50 times over 2022-2024) were assigned via the closes match identified through a Large Language Model (LLM) and/or assigned into a miscellaneous 'other' role, under the closest relevant department

Illustration of the methodology to produce the final taxonomy and matched role information



Source: Ampere analysis of IMDB data

2

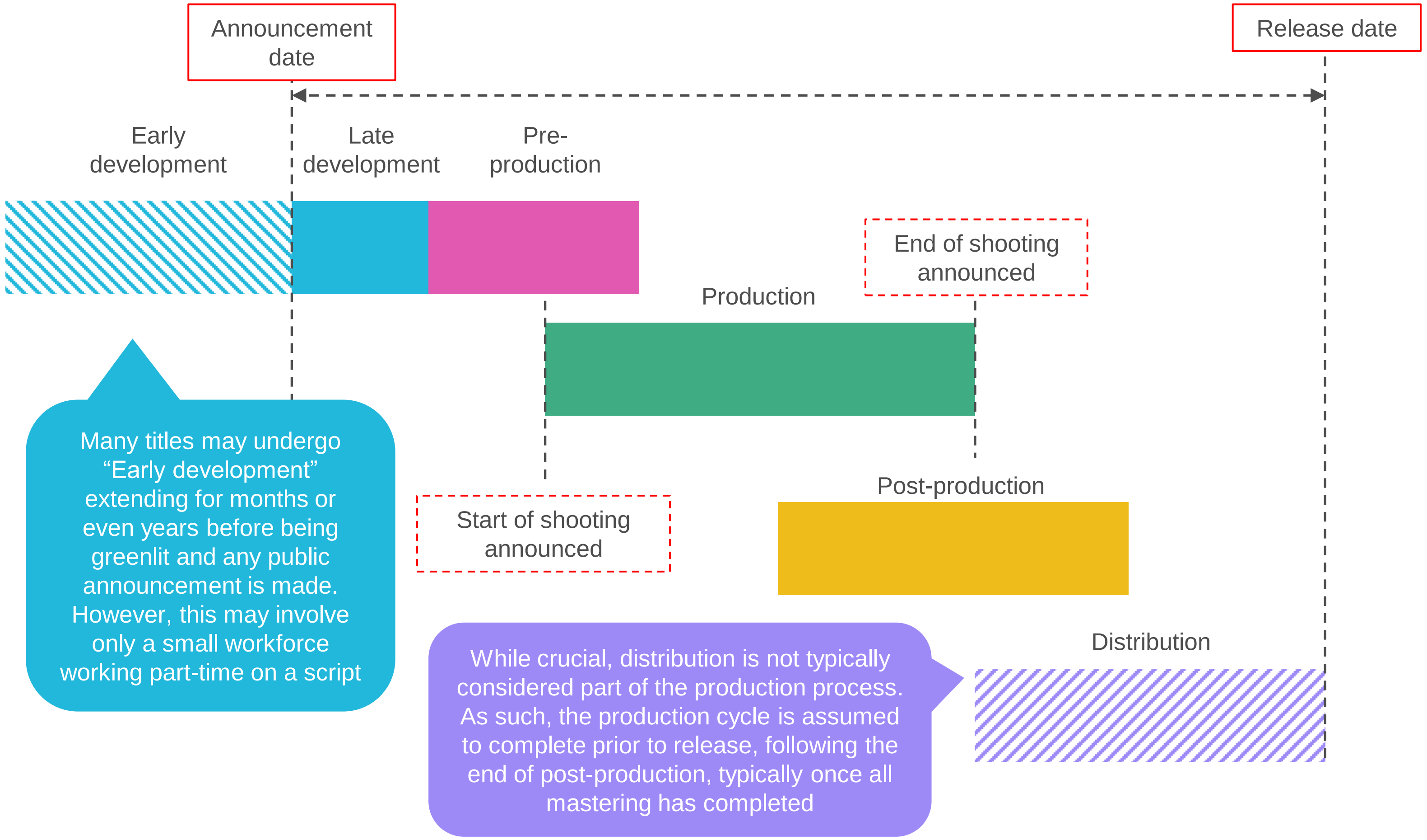
Modelling: Ampere's Commissioning data enables us to estimate the production timeline for each title

- Ampere's tracking of content announcement dates provides a proxy for start dates of the production cycle for over 1600 of the UK productions tracked through this industry data. Industry interviews have provided qualitative insights to verify assumptions around production timelines, and Ampere has made further provisions for titles with extended development time with minimal activity ("Early development"), as well as distribution periods once the production wraps and any post-production or VFX work concludes

- Additional information has been gathered around shooting dates for titles. These dates have been used to further align production timeline assumptions throughout the study

- Every title undergoes production differently, but the stages of development, pre-production, production, post-production and distribution are commonly referred to in the industry, indicating the production stage, the activity, and (with a little variation) the associated workforce

Illustrative production timeline for film & TV content

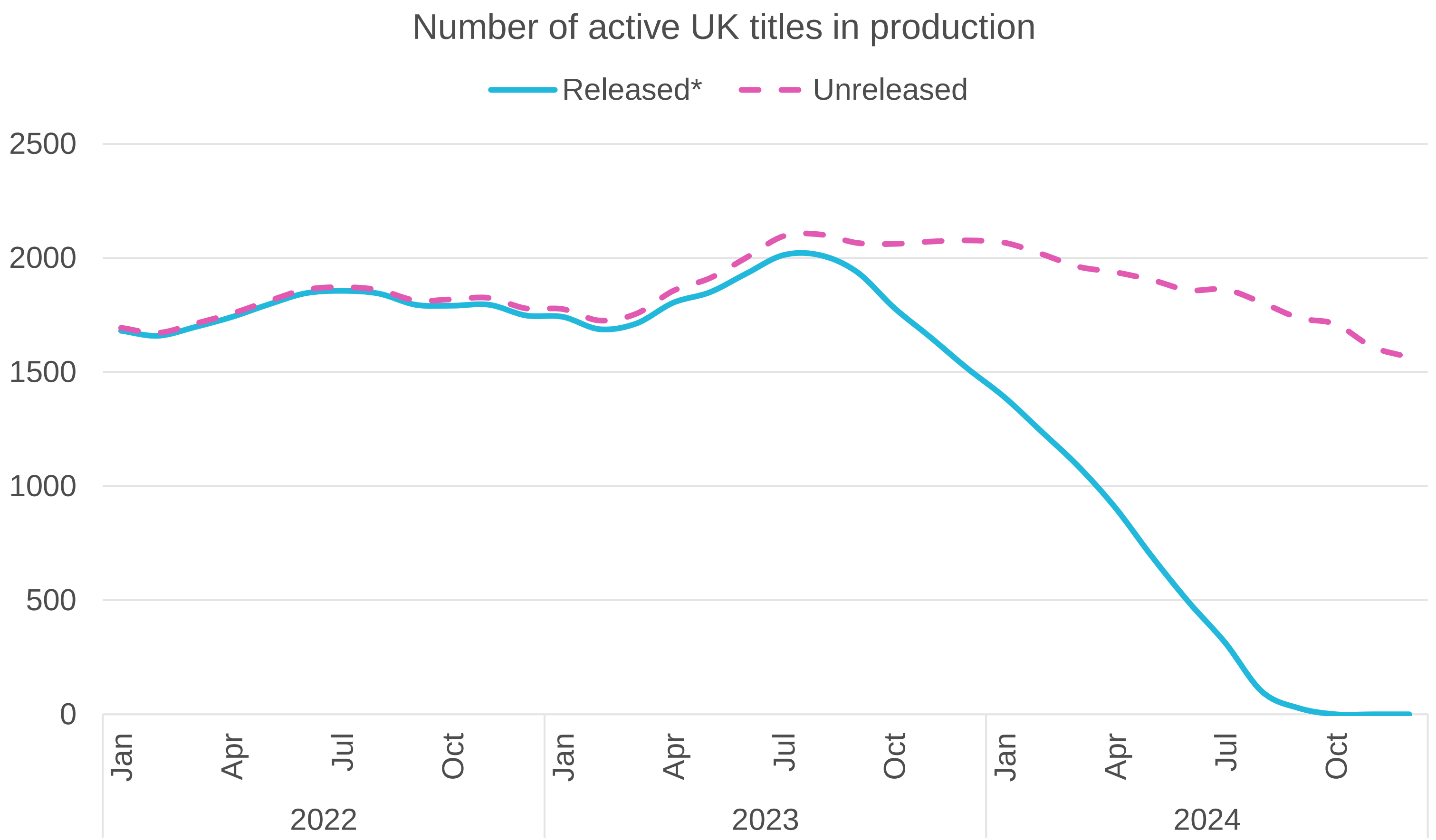


2

Modelling: … this allows for production activity to be mapped between announcement and release dates

- These timelines allow for an estimate of the number of active UK titles in production at any time between any announced start dates and the end of production, assuming time for distribution and marketing efforts. For example, as of Sept. 2024, a total of 2597 titles had been publicly announced by commissioners and producers but not yet released, and as such assumed to be at some stage of production prior to release

- By applying these assumptions across different content types (e.g. feature films with significantly longer production timelines than many TV shows) and adjusting for anomalies (e.g. outliers with significantly extended development phases), the number of ongoing, unreleased productions with no published crew data can be estimated for any given time



N=9043 film & TV titles

**Released titles as of Sept. 2024*

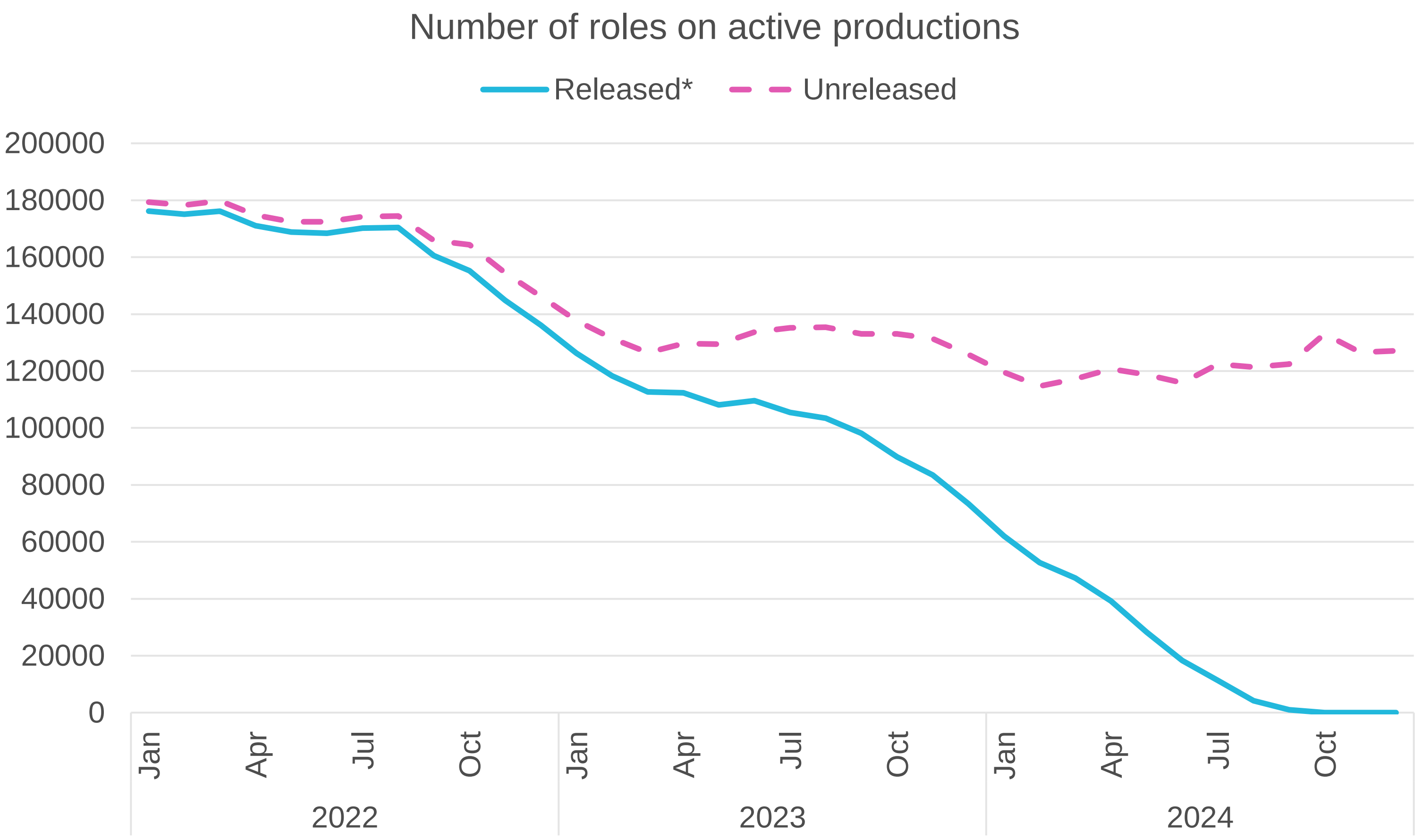
Source: Ampere analysis of IMDB data, Ampere Analysis Commissioning

2

Modelling: … and for the credited roles and workforce activity to be mapped over time

- The credited roles associated with each of these productions can then be assigned to each production, estimating the number active roles at any time since 2022. However, as this data enters late-2023 and 2024, the proportion of titles in-production, with no published credited roles, significantly increases. Emphasising the need for modelling to estimate the roles associated with titles in production. Similarly, many credited roles may be part-time, or feature the same individual credited on a title multiple times

- To simplify this data into a smaller number of roles and departments, a fixed taxonomy has been applied to recategorize and normalise these roles across productions. For example, the initial data included over 100,000 distinct credited roles. This has been simplified down to ~100. This taxonomy has been developed building on prior taxonomies from ScreenSkills and the 2023 Crew Mapping and Forecasting Methodology study commissioned by the BFI



N=9043 film & TV titles

**Released titles as of Sept. 2024*

Source: Ampere analysis of IMDB data, Ampere Analysis Commissioning

3

Modelling: Content types are used to interpret the workforce and activity for titles with no published data

- In the absence of published data (i.e. credited roles, release dates, commissioners' announcements), titles have been segmented so that the most-similar, well-documented titles with complete data are used to inform modelling estimates for the associated title's workforce and production timeline

- This approach assumes that roles with comparable responsibilities, skill levels, or departmental contexts share similar workforce proportions. The table to the right defines the main segments of content types used to provide a guide to the size of workforces for each in-production title. Many of these segments have been further sub-segmented to account for the variance in production activity between titles. These sub-segments include more detailed content types (i.e. unscripted TV splits into documentaries, reality TV, etc.), content genres, and the approximate production timeline

- This method provides a reasonable extrapolation by leveraging known data while accounting for industry dynamics, ensuring a more complete estimate of the total workforce in UK TV and film production

Content types used to segment UK productions

Content type	Ampere's definition
Animation	Film & TV titles identified under Ampere's 'Animation' genre*, capturing titles where most of the visuals are created through animation techniques, rather than being live-action. Titles with over 150 distinct credited crew are re-categorised under film and HETV. Examples include *A Bear Named Wojtek (2024), The Singalings (2022)*
Children's TV	Scripted film & TV titles suitable for younger audiences and often designed to be enjoyed by entire families are identified under Ampere's 'Children & Family' genre*. These titles typically aim to entertain or educate children and frequently feature narratives involving children, family settings, or themes. Examples include *The Makery (2024), The Beaker Girls (2022-2023).* Many children's TV titles may fall into the animation, scripted TV or unscripted content types, due to the ambiguous nature of this genre of content
Unscripted TV	Programming that does not rely on pre-written scripts or fictional narratives. This has been further sub-segmented into genres, like reality TV, documentary-style series, game shows, and talk shows, to accommodate the differences in productions. Examples include *Love Island, The Great British Bake Off, X Factor, The Graham Norton Show, Panorama*
Film (large-scale) Film (small-crew)	Any one-off feature or film, which can include films, standalone documentaries, comedy specials or various shorts. Any titles with over 150 distinct credited individuals have been categorized as large-scale film (e.g. *Barbie (2023), Paddington in Peru (2024)*), all others fall into small-crew films (e.g., *Rye Lane (2023), Bird (2024)*)
TV (large-scale) TV (small-crew)	TV includes one or more TV seasons that belong under the same TV Show title or brand. Any titles with over 150 distinct credited individuals have been categorized as large-scale TV (e.g. *Planet Earth (2016), Slow Horses (2022)*), all others fall into small-crew TV (e.g., *EastEnders, Such Brave Girls (2023)*)

**Ampere has its own genre groups; these genres are assigned by the most frequently occurring descriptions from sources of metadata and weighted to exclude the non-descriptive genres (e.g. entertainment). This allows Ampere to consistently classify genres across over 700,000 titles*

Source: Ampere Analysis

3

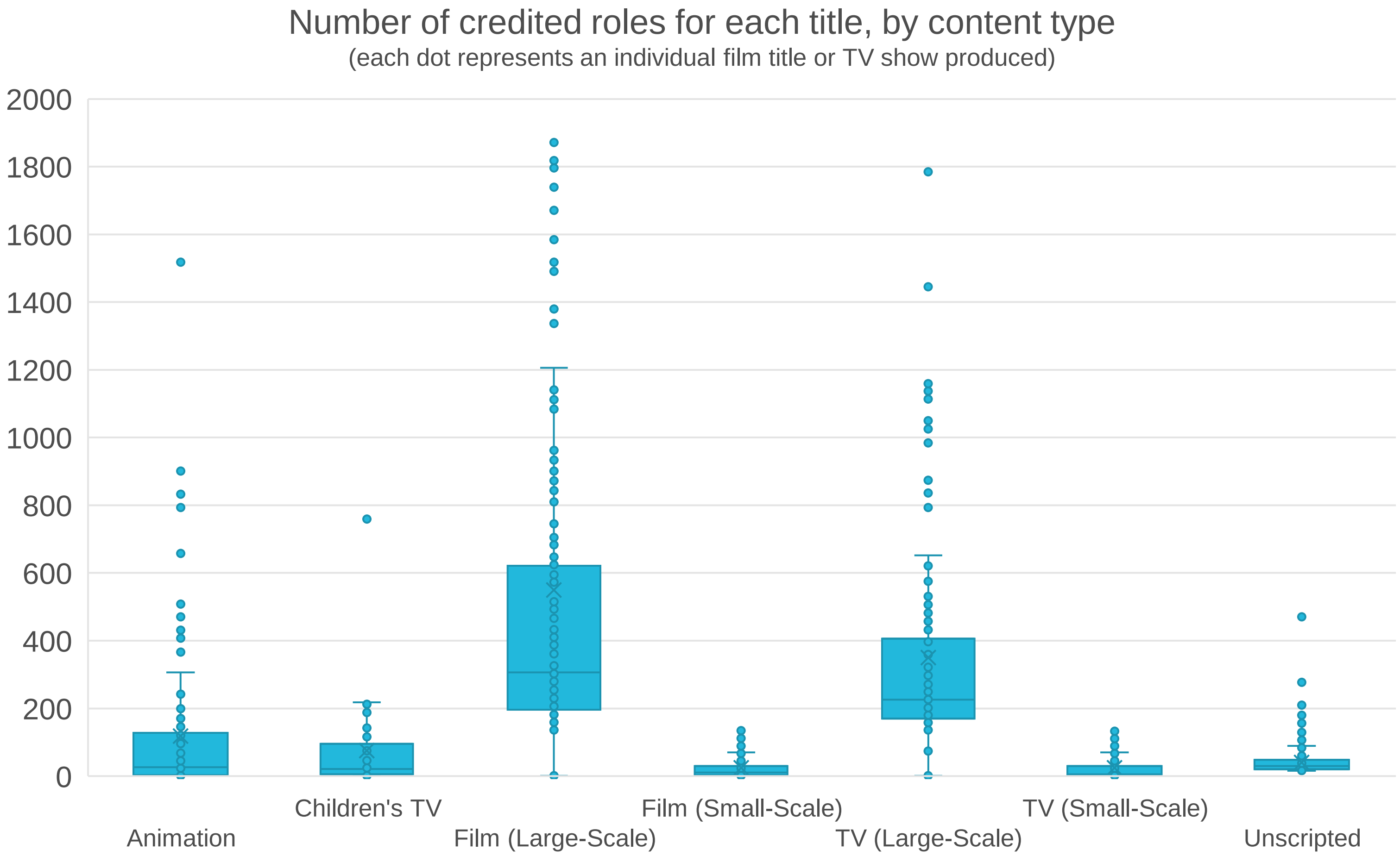
Modelling: For titles with no published credits, typical crew sizes have been applied

- While the size and composition of the crew workforce can vary significantly depending on the format, genre, and complexity of the project, the chart on the right demonstrates the range of the number of credited roles by content type

- Large-scale film and TV often involve extensive large crews, with typically 200 – 600 credited roles working on a production for film e.g. *The Boys in the Boat* (*2023, filmed in South East*) , and 200 – 400 for TV e.g. *Mary & George (2024, partially filmed in South West).* A few outliers, typically Hollywood productions filmed in the UK, can range up to 4000 credited roles (e.g. *Mission Impossible: Dead Reckoning Part One (2023, filmed parts in East Midlands and West Midlands)*, *The Little Mermaid (2023), Andor (2022)*, *House of the Dragon (2022)*)

- Most animation titles have 20 – 130 credited crew (e.g., *A Bear Named Wojtek (2024), The Singalings (2022)*), with a few exceptions with crews comparable to large-scale film & TV *(e.g. Chicken Run: Dawn of the Nugget (2023), Nimona (2023)*)

- Most other productions (i.e., children's TV, scripted TV, short/Independent films and unscripted TV) have between 10 – 50 credited crew



N=5352 film & TV titles

Source: Ampere analysis of IMDB data

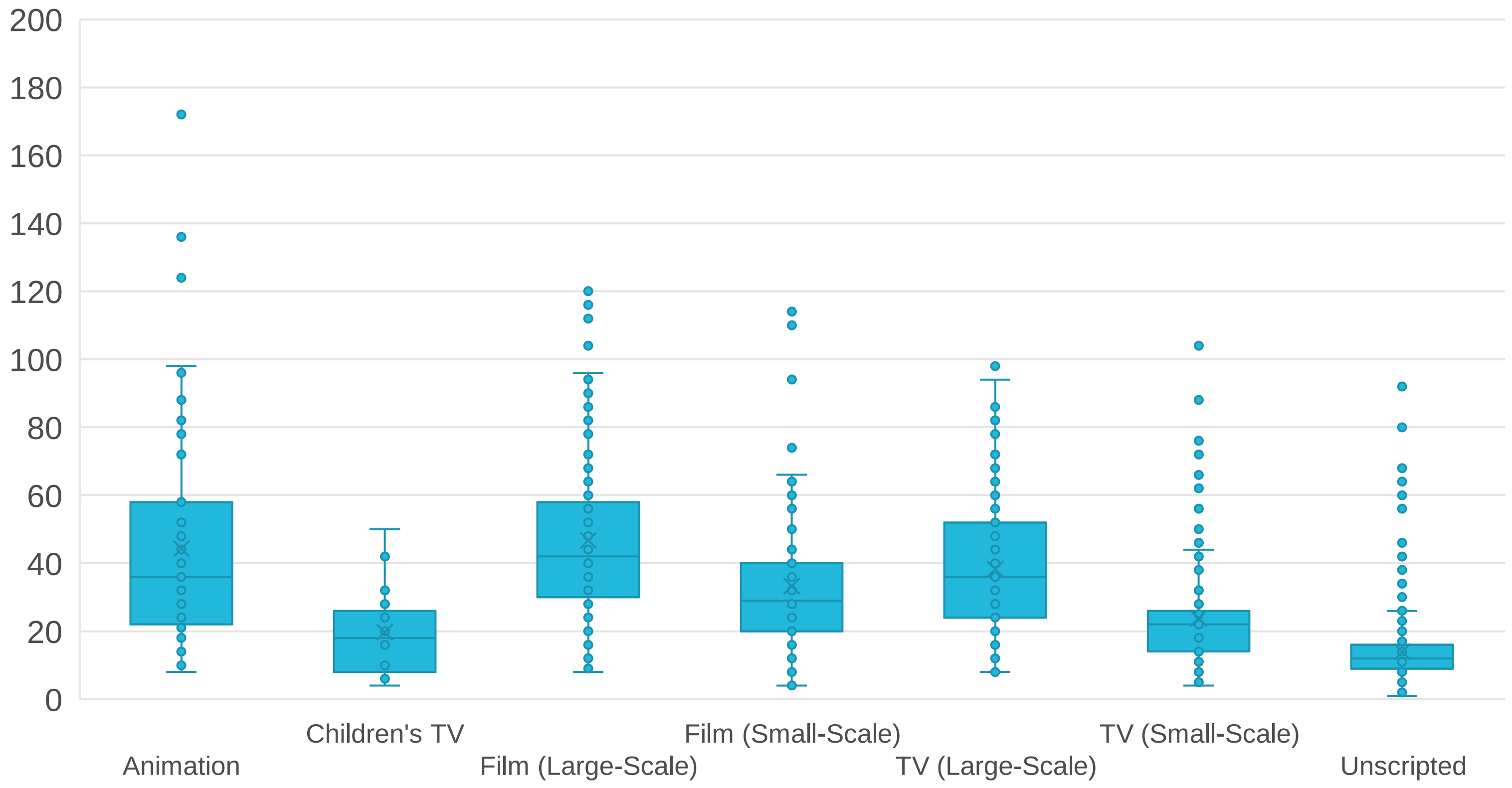
3

Modelling: Production timelines are similarly assumed – where no public data exists

- Similarly, the length of production can vary dramatically between projects, but the chart to the right demonstrates the commonality of production timelines among similar productions
- Children's TV, and film and unscripted TV are very commonly produced in less than two years (e.g. *The Makery (2024), The Beaker Girls (2022-2023), The Man Who Bought Cricket (2022)*), with few titles lasting longer (e.g. *Dodger (2022), A Kind of Spark (2023)*)
- Large-scale film and TV may often take significantly longer from the early development stage to the end of post-production
- These crew and production timeline assumptions, further segmented by genre and additional content metadata, have been used to estimate activity for UK productions without such published data

Length of production timeline (number of months)* for each title, by content type

(each dot represents an individual film title or TV show produced)



** Number of months estimated for the production timeline between the announced date and estimate end of post-production (see slide 72)*

N=1612 film & TV titles

Source: Ampere analysis of IMDB data, Ampere Analysis Commissioning

3

Modelling: Production activity over time has been further assigned by department, role and content type

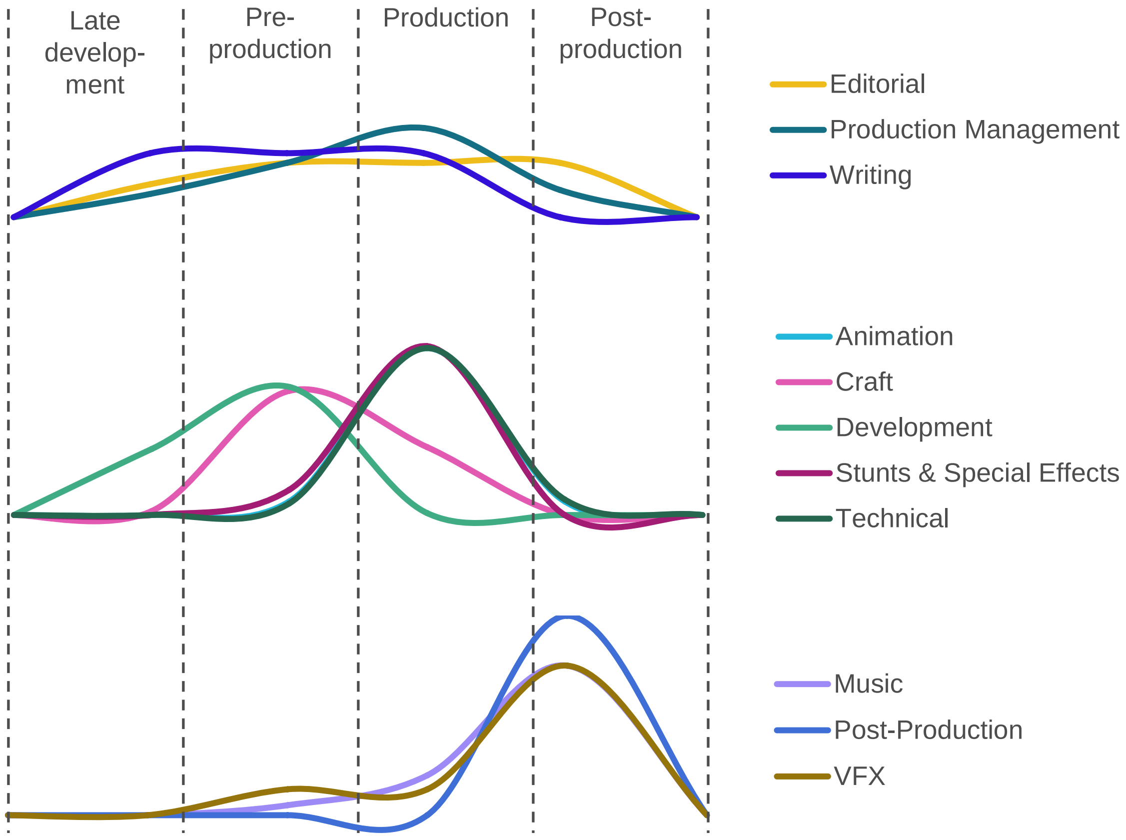
- The involvement of various departments in the production timeline for film and TV content depends on the type of project and the creative demand. Ampere has interviewed 30 production companies across the UK for an understanding of how the workforce and activity breaks down by department during the late development, pre-production, production, and post-production phases. While the phases are often referred to as distinct stages, there is considerable overlap. This illustration demonstrates when various departments may be active throughout the production timeline of film and TV content

- The editorial, production management and writing departments are commonly active throughout production to ensure the production is organised, polished and follows the intended creative direction

- Craft, technical, stunts & special effects and animation (where applicable), see their highest activity during the production phase, or in pre-production. Similarly, music, post-production and VFX activity predominantly active in the post-production phase, although with the emergence of new technologies (i.e. virtual production) VFX is increasingly involved earlier in the production cycle

- These utilisation curves allow for the crew workforce's activity during production to be further allocated at any point in time between the announcement date and release date, with further considerations included for the start and end of production (i.e. with all post-production work completing one or more months prior to the release date, allowing for distribution)

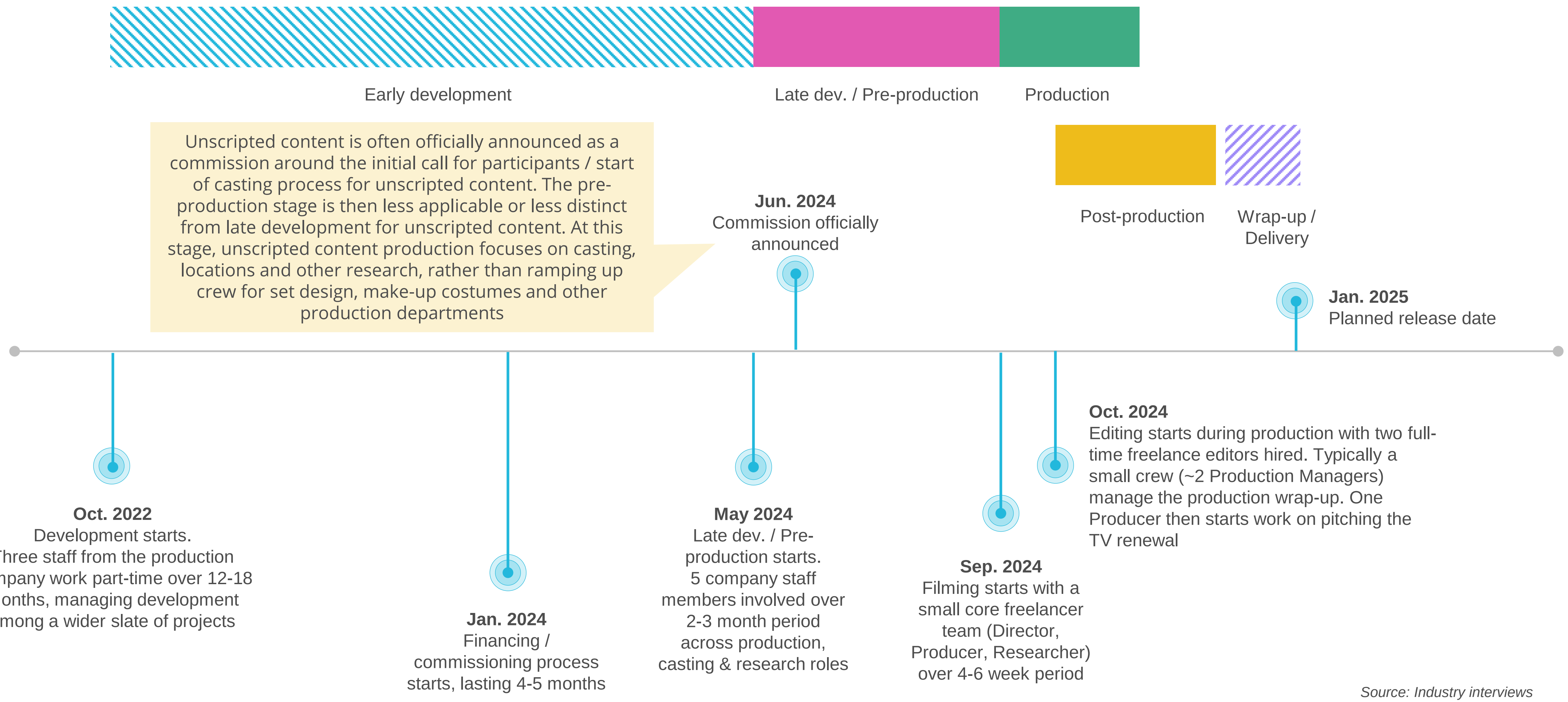
Illustrative utilisation curves during production for Film & TV content, by department



Source: Industry interviews

3

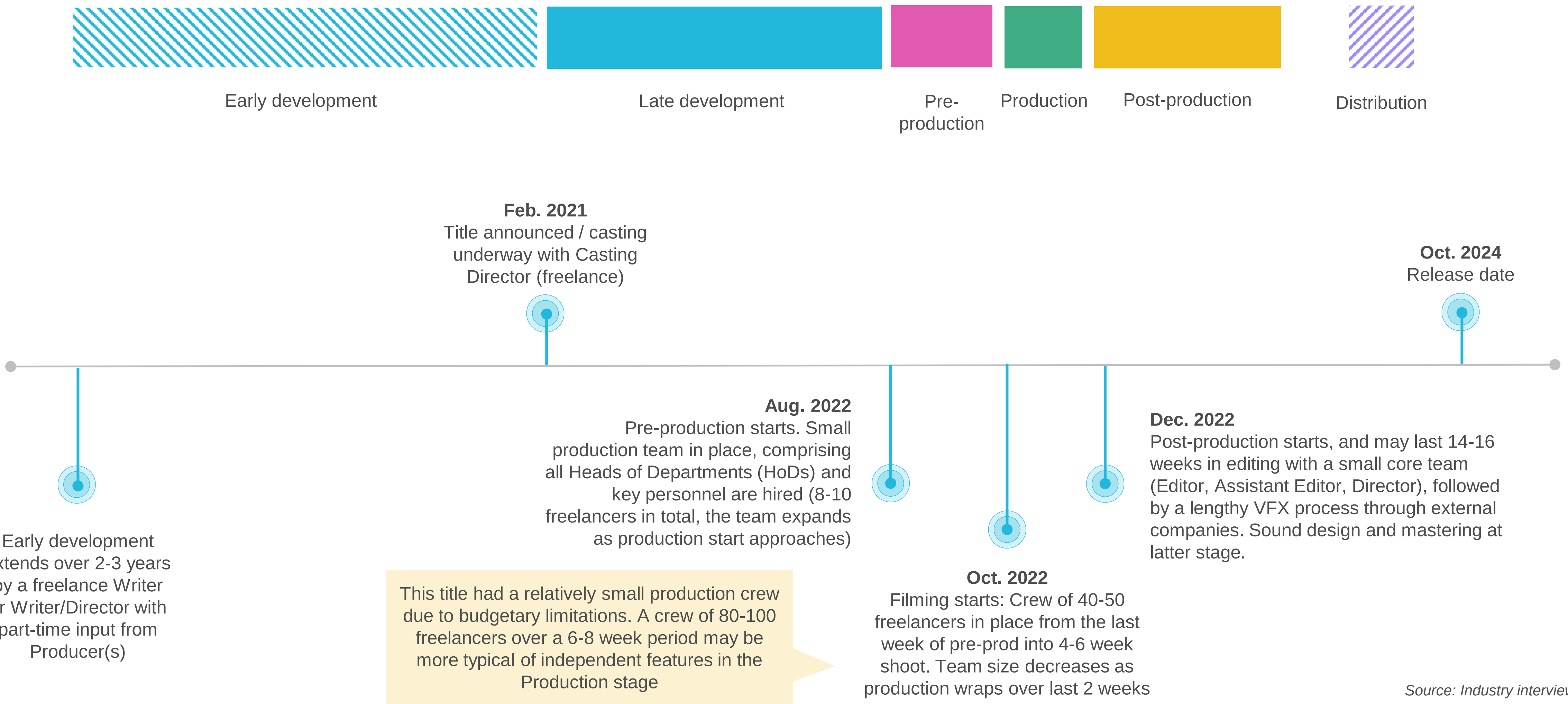
Modelling: Example production timeline for a reality health show (8x60’)



Source: Industry interviews

3

Modelling: Example production timeline of a sci-fi feature film (1x90’)

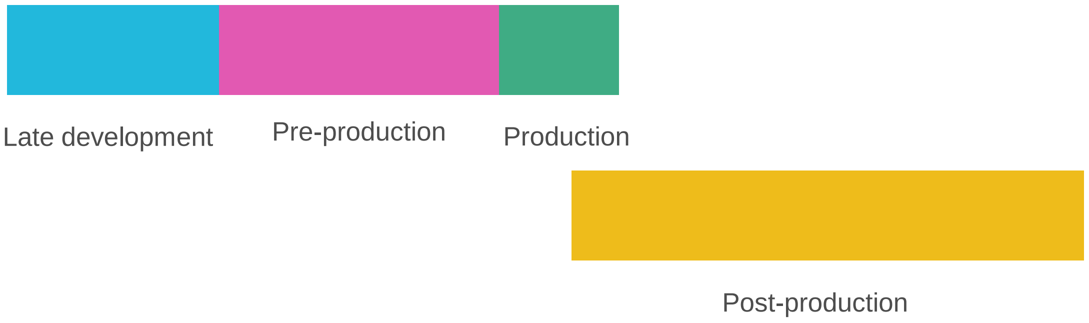


Source: Industry interviews

3

Modelling: Example of a returning high-budget reality survival show (6x60’)

No early development stage – due to being an established show



Late development.
10 freelancers are hired across production and production management roles. As this is a renewal of an existing show, the focus was on location development, lasting for ~2 months

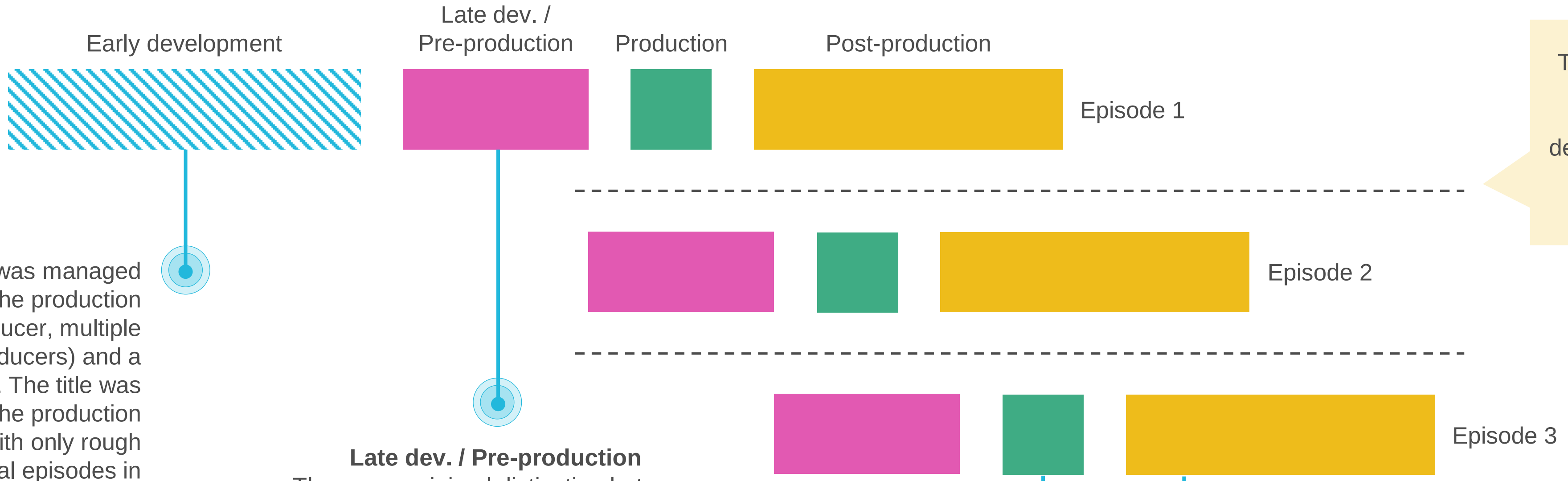
Pre-production.
Additional 30 freelancers hired for pre-production over 6-8 weeks across directing, producing and production management roles, ramping up in the final week before production

Production.
An additional 150 freelancers hired for ~4 weeks over the production stage, including many specialised skillsets (e.g. health & safety, drone operating). This format required a 24h filming schedule, and as such had two teams of 10 producers

Post-production.
Editing and post-production began immediately after episodes were shot. This involved 40 freelancers across a 6-months period, including specialist edit producers and edit directors. A small production management team remained in place throughout this stage.

Source: Industry interviews

Modelling: Example of a BBC docuseries shot internationally (3x60’)



This docuseries used a staggered production schedule, with each episode requiring a distinct late-development / pre-production stage focused on the location management of the shoot.

Early development was managed in-house by the production company (Exec Producer, multiple Development Producers) and a freelance producer. The title was greenlit based on the production plan for 1 episode, with only rough details of additional episodes in place

Late dev. / Pre-production
There was minimal distinction between late-development & pre-production for the Docuseries. This stage focused on location development with a core production team (Series Producer, Producer, two Researchers, Production Manager, Production Coordinator – all freelance)

Production
Each episode was shot over 3 weeks with 3 crew members from the UK and 9 hired internationally (covering location logistics, equipment, translation services)

Post-production
Each episode had 10 weeks of edit per episode, followed by 4 weeks of grading, colouring, sound, track laying, dub, and voice-over recording. Additional admin, clearances, budget reconciliation and delivery managed in coordination with the production management team (typically a freelance production manager, delivery coordinator)

Source: Industry interviews

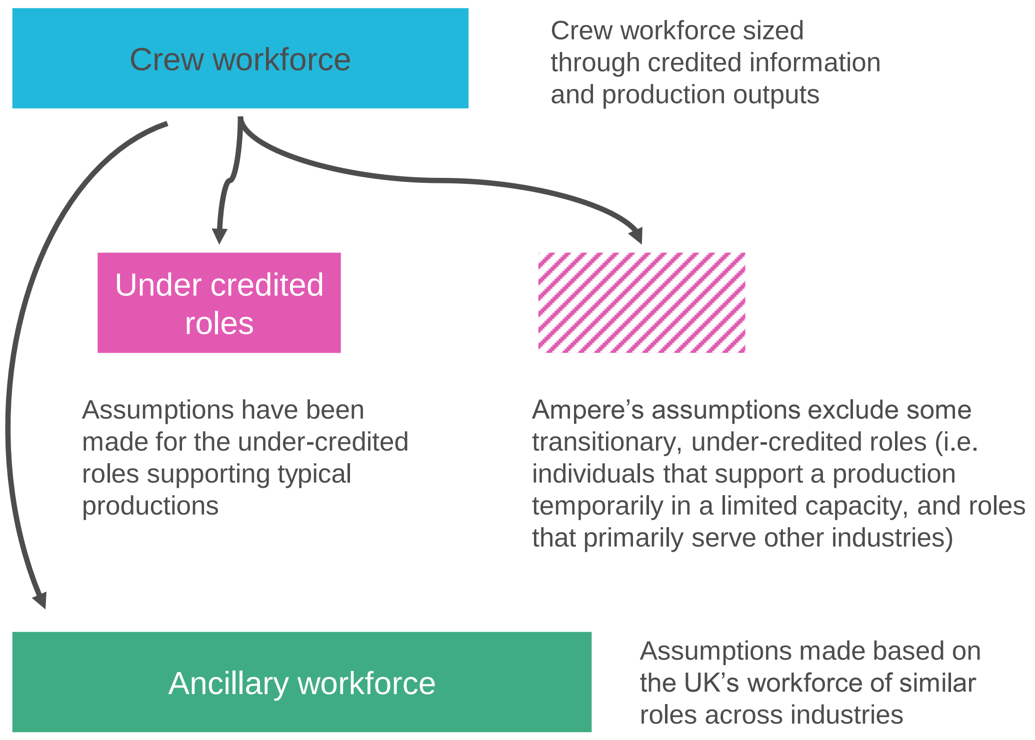
Modelling: Extrapolations have been made to account for under-credited roles and the ancillary workforce

- Under-credited roles form an invisible workforce for TV & film production and pose challenges for any workforce study. These roles are not acknowledged in published credits or databases, making it difficult to track their contributions. Similarly, these roles may operate informally or as freelancers, often unrecorded in official employment statistics. As the production industry is project-based, these under-credited roles often move between short-term contracts or freelance roles, and may include a transitory workforce (i.e. runners or other junior staff who temporarily support a production, then return to employment in other industries, such as hospitality or retail) or a part-time workforce that may predominately serve other industries (e.g. caterers who supply events outside of the production industry)

- Industry interviews suggested runners and production accountants, among other roles, were among the most commonly under credited roles. Based on Ampere's industry interviews, and qualitative reviews of published crew job requirements on databases such as Mandy UK, assumptions have been made regarding the typical numbers of such under credited roles supporting the crew workforce

- Ancillary Roles are equally vital, ensuring organizational sustainability, these include roles like HR, Logistics, and Finance, not directly tied to productions but necessary for sector-wide operations. This ancillary workforce has been extrapolated from the crew workforce, including underpredicted roles, assuming this workforce is consistent proportionally with other industries in the UK. UK ONS data suggests this is approximately 9%*

Illustration of the estimated additional workforce, including under credited roles and the ancillary workforce



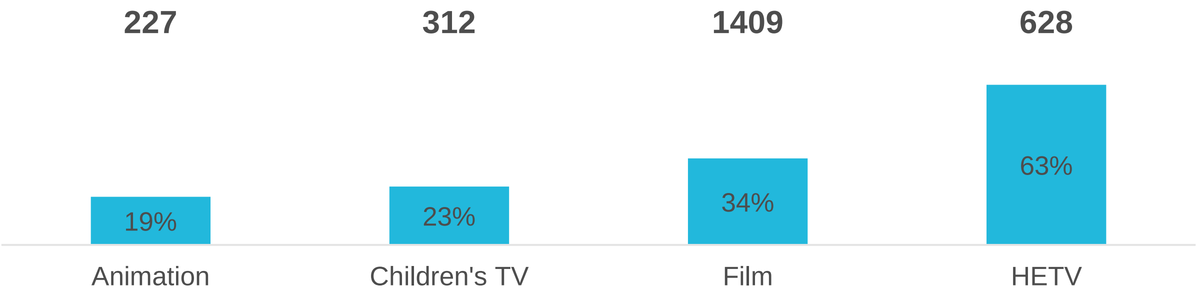
** The UK ONS's Broad Industry Groups includes 'Business Administration and Support Services', comprising a range of activities that support the overall functioning of businesses, that has accounted for ~9% of total UK employment in the last two datasets (2023 provisional, and 2022 revised)*

Modelling: Finally, titles are re-allocated to match industry-recognised categories of AVEC-certified titles

- All UK productions in this study have been matched against the BFI's list of certified titles that passed the cultural test and qualified for UK creative industry expenditure credits. This includes certifications across four categories: animation, children's TV, film, and High-End TV (HETV)

- The table on the right shows the total number of certified titles and the proportion identified within this study's UK production sample. For example, 62% of certified HETV titles (628 in total) appear in Ampere's dataset, compared to lower representation in film (34%), animation (19%), and children's TV (23%). Most missing certified titles were either released before 2022 (and thus outside the study's production scope) or covered content not directly tracked, such as standalone TV episodes, short films, infotainment, or content with limited published crew data

Total number of titles certified for UK tax reliefs and proportion captured among UK productions in this study, by AVEC category



** Including all BFI certified film titles under the cultural tests up to Dec. 2024*

Examples of AVEC-certified titles recategorized using metadata for modelling

Title: Luther: The Fallen Sun (2023)
AVEC certification: HETV (2023)
Format: 1x129'
Ampere content type: Film (large-scale)

Title: A Kind of Spark – season 1 (2022)
AVEC certification: Animation & children's TV (2024)
Format: 10x25'
Ampere content type: Children's TV

Title: Skint (2022)
AVEC certification: Film (2022)
Format: 7x15'
Ampere content type: TV (small-crew)

Annex: Glossary of terms

The study required the development of a comprehensive taxonomy of individual roles and departments, and use of two separate taxonomies of titles for modelling and reporting purposes

UK production and associated workforce definitions

Term	Definition
UK productions	This study identifies UK productions as any film & TV titles that have been mainly produced or financed in the UK during the years 2022 – 2024. This timeframe was selected to reflect the post-COVID recovery period in the industry, avoiding any mid-pandemic effects on production staffing and timelines. Notably, this timeframe also includes a period of heightened production activity driven by streaming services investment in Original content. This definition differs from other research, such as the BFI industry data, which tracks certified British productions that qualify for tax reliefs. As of January 2025 – 2,081 films and HETV shows were certified over 2022 – 2024, along with a further 540 items of children's TV and animation content, totalling 2,621 titles certified as British through the cultural tests. This compares to Ampere's broader definition for UK productions totalling 9966 film / TV titles, including titles produced or financed in the UK that have not, or are yet to qualify as British by the BFI. Further differences exist between the BFI titles and those tracked in this report, as the BFI data includes various formats such as clips and educational content from the tax relief awarded date, while this report focuses solely on full-length films and TV shows from date of announcement through to date of release.
Crew workforce	For this study, the crew workforce encapsulates a wide range of roles working directly on film & TV productions. This workforce, often referred to as 'the crew', excludes on-camera talent and actors. The category includes credited roles and under-credited or uncredited roles. Credited roles are positions formally acknowledged in the production credits and include key creative, technical, and administrative roles (e.g. directors, writers, cinematographers), while under- or uncredited roles include those that work directly in the production process but may not have been formally credited due to being junior, freelancers, or temporary staff, or due to space limitations or contractual reasons. This study does not directly rely on the published SIC and SOC codes covering the screen industries, as these are broadly defined and include businesses not directly involved in the production process. Review also reveals that some businesses may have been misallocated under these codes.
Ancillary workforce	The ancillary workforce in film and TV production refers to all individuals and services indirectly supporting a production. These roles, while not directly involved in the creative or technical aspects of filmmaking, are essential for facilitating and sustaining the production process. The ancillary workforce includes administrative and facility support, logistics and transport, catering and hospitality, local and external vendors. This part of the workforce is not specific to the entertainment sector and may often serve other industries.
Roles vs Individuals	A "role" refers to a specific job function, while an "individual" is the person performing that job. The number of roles involved in a production will account for multiple individuals performing the same role or a single individual performing multiple roles, while the number of individuals will account for the number of distinct persons working on a production.

Sub-sectors or content type definitions in the UK film & TV production landscape

- Ampere has categorised and reported on UK productions across two distinct classification systems throughout this report:
  - ‘AVEC categories’ matches titles and their associated workforces against the BFI’s published list of titles certified as British via its cultural tests. This includes the categories HETV, film, children’s TV and animation, as well as ‘Other’ (all other UK productions that have not yet qualified under one of the UK’s tax reliefs, AVEC-certified as of Jan 2025)
  - ‘Content type’ is an Ampere definition which classifies all titles based on the format, genre and crew-size associated with the title and was used to support the modelling process. The table to the right defines these content type categories

Content types used to segment UK productions for modelling purposes

Content type	Ampere’s definition
Animation	Film & TV titles identified under Ampere’s ‘Animation’ genre*, capturing titles where most of the visuals are created through animation techniques, rather than being live-action. Titles with over 150 distinct credited crew are re-categorised under film and HETV. Examples include *A Bear Named Wojtek (2024), The Singalings (2022)*
Children’s TV	Scripted film & TV titles suitable for younger audiences and often designed to be enjoyed by entire families are identified under Ampere’s ‘Children & Family’ genre*. These titles typically aim to entertain or educate children and frequently feature narratives involving children, family settings, or themes. Examples include *The Makery (2024), The Beaker Girls (2022-2023).* For modelling purposes, many children’s TV titles may fall into the animation, scripted TV or unscripted content types, where these genres were felt to be better reflective of production timelines and crews
Unscripted TV	Programming that does not rely on pre-written scripts or fictional narratives. This has been further sub-segmented into genres, like reality TV, documentary-style series, game shows, and talk shows, to accommodate the differences in productions. Examples include *Love Island, The Great British Bake Off, X Factor, The Graham Norton Show, Panorama*
Film (large-scale)	Any one-off feature or film, which can include films, standalone documentaries, comedy specials or various shorts. Any titles with over 150 distinct credited individuals have been categorized as large-scale film (e.g. *Barbie (2023), Paddington in Peru (2024)*), all others fall into small-crew films (e.g., *Rye Lane (2023), Bird (2024)*)
Film (small-crew)	
TV (large-scale)	TV includes one or more TV seasons that belong under the same TV Show title or brand. Any titles with over 150 distinct credited individuals have been categorized as large-scale TV (e.g. *Planet Earth (2016), Slow Horses (2022)*), all others fall into small-crew TV (e.g., *EastEnders, Such Brave Girls (2023)*)
TV (small-crew)	

**Ampere has its own genre groups; these genres are assigned by the most frequently occurring descriptions from sources of metadata and weighted to exclude the non-descriptive genres (e.g. entertainment). This allows Ampere to consistently classify genres across over 700,000 titles*

Source: Ampere Analysis

Production department or workforce group definitions in the UK film & TV production landscape [1/2]

Production department	Definition
Animation	This department encompasses individuals who specialize in the creation and execution of animated content or graphics. This includes a wide range of creative and technical roles (e.g. animators; animation artists, directors or supervisors; character designers; modellers). This department focuses exclusively on the artistic and technical processes required to produce animated content and graphics, distinguishing it from broader production management roles or general departments not specific to animation
Craft	This department comprises a number of sub-departments responsible for the design, creation/construction, and maintenance of the visual and tactile elements in a production. This department would broadly cover the individuals or groups working on hair & makeup, costumes, set design & decoration, construction, as well as the art department leadership (i.e. departmental directors and assistants) and support roles (e.g. runners that work within or across such departments)
Development	This department is responsible for the conceptual and preparatory stages of a production, typically focusing on shaping the initial creative vision, assembling key talent, and securing necessary approvals or resources to transition the project into production. Key roles here include the showrunner / creator, casting director, researchers and commissioning editors, among others.
Editorial	This department is responsible for overseeing the creative direction, storytelling, and overall execution of a project throughout production. This department ensures that the narrative, tone, and artistic vision are consistently maintained throughout the production process. Key roles here include the director, co-director, executive producer, story producer, and other senior producers, among others
Music	This department creates and records original music, or curates music to be edited into the titles in post-production to enhance the emotional and narrative elements of a production. The department includes roles such as the composer, musicians, and music engineers and excludes roles associated with on-location sound recording or general post-production sound
Post-production	This department refines and completes the project once filming is finished, ensuring the title’s visuals and audio are polished, cohesive and meet the creative and technical requirements. Key roles include video editors, sound designers and sound editors

Production department or workforce group definitions in the UK film & TV production landscape [2/2]

Production department	Definition
Production management	This includes a range of roles responsible for the logistical, financial, and operational coordination of a project, ensuring that productions run smoothly, on schedule, and within budget, overseeing everything from planning and resource allocation to on-set coordination. Key roles here include producers and production executives, production managers and coordinators, assistant directors, location managers and production accountants, among others
Stunts & special effects	This department is responsible for designing and executing practical or on-camera effects, and stunt sequences on the production. Key roles here include the stunt coordinators or supervisors, stunt doubles and stunt performers and special effects technicians
Technical	This department is responsible for the operation and management of essential technical equipment used for the production. This department covers a range of highly skilled, less creatively-focused roles that support the filming process through camera operation, sound recording, lighting and rigging, including roles such as camera operators and assistants, lighting technicians and electricians, location sound recordists and boom operators, and grips & riggers
VFX	The VFX departments is a specialized team responsible for the creation, integration, and execution of visual effects within live-action or hybrid productions by digitally creating environments, objects, creatures, or effects that are not captured during the actual filming process. Key roles include VFX Editors and Producers, lighting directors, animation artists and compositors, among others. This department is distinct from the post-production department, which finalizes the product by editing, sound mixing, and colour grading, and from the animation department, which focuses on entirely animated productions, including both 2D and 3D animated content
Writing	This department primarily includes writers and script editors responsible for scripting the narratives, dialogue, and character development of the production, as well as refining and ensuring the quality and coherence of the story once the project has progressed beyond development and throughout the production process

Other roles involved in the film & TV production process may include uncommon roles specific to select titles with a specific need, or roles that are not dedicated to the core creative, technical or management processes on a production. These roles may include positions such as administrative roles, those which are ancillary to the immediate production process, or those which support later in a title's lifespan (for instance sales and distribution)

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