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# High-end Television in the UK

2024/25 workforce research

March 2025

# Acknowledgements

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This research was prepared by Gideon Barker, Insight Director, Customer IQ.

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## Summary

- This report covers key findings and new opportunities derived from the HETV Skills Fund research for 2024/25. The research method of a pre-screening online survey and follow-up in-depth interviews was consistent with the method from previous years. The fieldwork period was from October 2024 to January 2025. The sample was largely made up of line producers, heads of production, production managers and producers from the HETV industry.
- The landscape of HETV in the UK appeared to be quite different to that of previous years. Interviewees suggested a downturn in activity, with lower levels of commissioning and lower sizes of commissioning budget.
- This was referenced by some as a “crisis”; something which may be more acute among the independent production companies who were represented by interviewees in this research. Other interviewees suggested very solid levels of HETV work in certain nations and regions.
- Fewer participants were working in HETV in 2024/25 compared to previous years, although the majority (63%) were either in work or about to start work on a HETV project. A sense of more uncertainty in the industry was very clear from conversations with interviewees.
- Concerns from interviewees has been largely for the plight of newer entrants and junior crew as to whether they would be able to sustain their career path in HETV. There was a strong sense from interviewees that the focus of support in the current climate should be on mid-level crew and not on new entrants. It was felt that new entrants were being encouraged to enter an industry when there is little work for them.
- Concerns have also been aired over the risk to further improvements in diversity in the workforce during times of lower demand. As before, rates of pay were a key concern, exacerbated due to the perceived tighter budgets for HETV productions.
- Despite the more negative context around the HETV industry, there has been a positive shift in how skills-related issues are perceived. This is both in terms of the skills shortage and the skills gap. Many interviewees noted the relative ease of finding high quality crew in this period of lower demand.
- The decline in the perceived severity of the skills shortage, skills gaps and other associated skills issues may be welcome but may also be temporary until such time that the level of demand for HETV production increases.
- There appears to be more adoption of virtual production methods in 2024/25 than in previous years. The perceived barriers to adoption still exist, however, mainly around cost and authenticity. It has emerged from the 2024/25 research that there may be a need to help editorial and creative leaders to understand how virtual production can be applied to a script or story.
- Feedback for the various HETV Skills Fund programmes is very positive, as is the feedback for the team who manage the fund.
- Some constructive feedback for the Skills Fund might be considered in order to develop and improve the offering further.

## Background and objectives

ScreenSkills is the UK's industry-led skills body for the screen industries. Within its remit is the administration of the High-end TV (HETV) Skills Fund; a voluntary fund paid into by HETV productions who are benefiting from the High-end Television Tax Relief scheme in order to grow and develop freelance workforce skills.

The HETV Skills Fund delivers strategic initiatives to tackle the skills shortages and skills gaps within the freelance workforce.

Regular consultation with industry on the current skills-related challenges specific to HETV and their needs is vital in order to deliver impact.

Feedback in the form of annual research has been used to inform the HETV Council and its Working Groups since 2017. Research findings from 2024/25 will inform spending in 2025/26.

This report summarises findings from the eighth wave of research.

The objectives, method and scope of the research has remained consistent over time. Key objectives for the 2024/25 research were:

- To identify the key skills and grade shortages and associated issues from the HETV industry as well as any areas of oversupply in the workforce
- To enable the HETV Skills Fund to be more strategic in its investment plans for 2025 and beyond

## Research method

As with previous years, a mixed method of research was adopted.

Quantitative data was collected from a pre-interview online survey which included key metrics, sample profile and open-ended, opinion-based responses.

Qualitative interviews were carried out among a sample of those working in the HETV industry. A large sample of qualitative interviews aimed to provide a higher level of detail and also ensure a large number of individuals were given the opportunity to have their say on current issues. The self-selecting sample was drawn from the HETV Skills Fund team's UK-wide industry contacts.

Quantitative: 71 pre-interview surveys completed online.

Qualitative: 50 remote video/telephone depth (semi-structured) interviews averaging 30 minutes in length.

Fieldwork took place between October 2024 and January 2025, a similar period compared to previous years.

The sample consisted largely of those who were directly involved in crewing up productions (e.g. line producers, heads of production, producers), with additional interviews with those in senior roles within production and those in broadcasting and support agency positions. The

2024/25 research also included an additional number of production managers compared to previous years.

As with previous years' research, emphasis was placed on participation outside of London. In 2024/25, 51% of interviews were among those based in London, 18% were based in the nations and 31% were based in an English region (outside of London).

The interviews followed a very similar topic guide to previous years, consisting of: top-of-mind issues, focus on skills gaps and skills shortages, drivers of skills gaps and shortages, dealing with issues and support received, and perceptions of future skills issues.

### Interpretation of findings

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

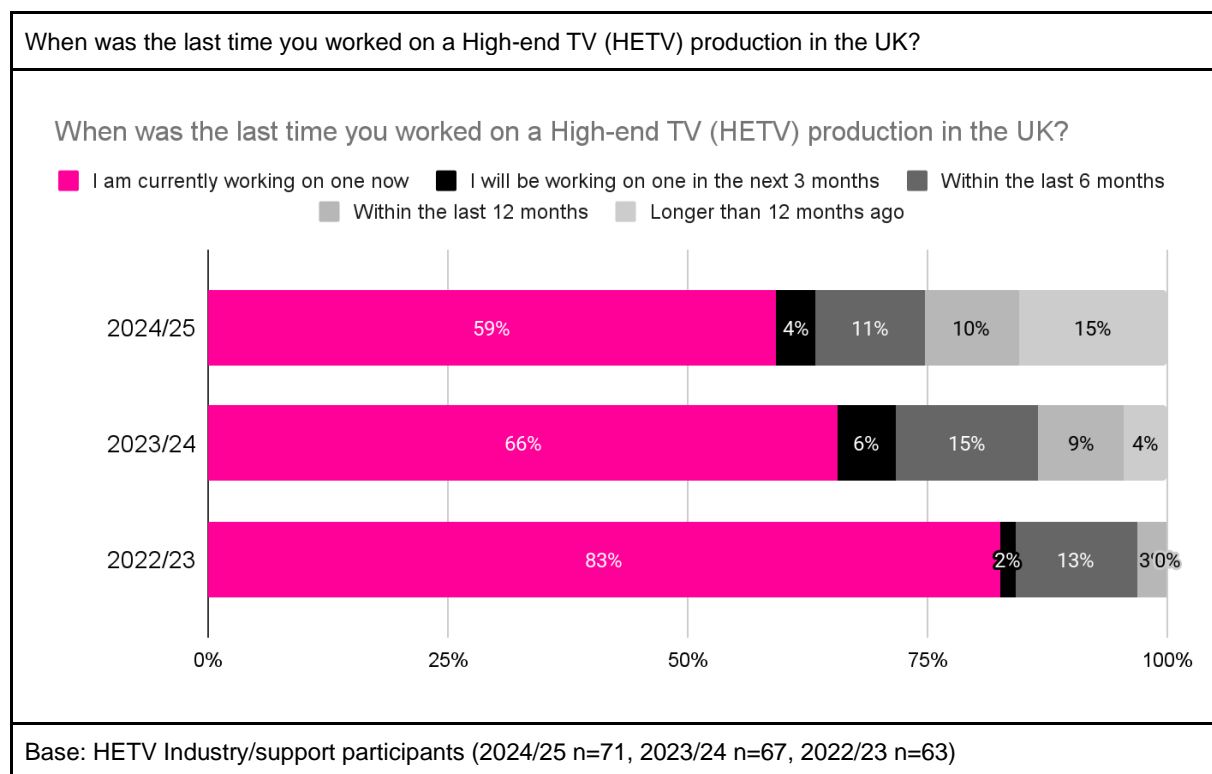
Where direct verbatim quotes are provided within the report, specific mention of "ScreenSkills" should generally be seen as a reference to the "HETV Skills Fund".

## Context: the current situation within the HETV industry

### The impact of a downturn on the independent production sector

The UK HETV industry has experienced a period of real turbulence in recent times. From the rapid growth of the late 2010s, the halting of production during the covid pandemic, through to the boom period post-covid and then a subsequent downturn in commissioning and production activity which started with the 2023 strike action.

In terms of engagement with HETV work, the sample from the 2024/25 research was split. 63% claimed to be either working on an HETV production now or were to be starting work on one in the next 3 months. This was a further decline from the corresponding figure in 2023/24 (72%) and 2022/23 (84%). In 2024/25, the remaining 37% had not worked on a HETV production for at least 6 months. From conversations with interviewees, those who were in work often referred to themselves as being 'lucky' to be so.



Interviewees in 2024/25 frequently highlighted a 'downturn' and even a 'crisis' in the industry in terms of the number of commissions and the size of commissioning budgets.

“I fully understand that the industry is in a real crisis and it's been a terrible year and it's very difficult to do business as it was done before and people are really hurting and I know a lot of crew who aren't working and a lot of production companies that are really feeling the pain” (exec producer)

“But it's dire, dire. The biggest challenge is the lack of commissions” (director of / head of production)

This appears to be slightly at odds with the fact that the level of investment going into the HETV Skills Fund has significantly increased between financial years 2023/24 and 2024/25.

Other sources of evidence might support the idea of a crisis, albeit perhaps relating more generally across genres of production and not specifically relating to HETV. It might also be that such a crisis is more acute within the independent production sector. For example, a survey of 67 independent production companies carried out by Indielab (May 2024), suggested that 72% of indies felt they were at risk of closure<sup>1</sup>. It should be noted that a significant proportion of interviewees in senior production roles were representing the independent production company sector.

Any downturn in activity does not appear to be uniform, however. From conversations, there were clearly pockets of high levels of activity in Wales, Scotland and the South West of England.

### The higher availability of crew

Across the interviews in 2024/25, those working in hiring positions recounted receiving more CVs and contact from those who were out of work. One interviewee even highlighted people physically turning up at production offices looking for work. Emails were said to show more signs of desperation this year. It was also suggested that more senior crew have been asking for work, not just junior or mid-level crew. One participant described themselves as ‘quietly busy’, quiet so as not to attract too much attention from those who were unable to find work.

“I can tell how quiet it is from the lack of calls I'm getting, but also from how many people are looking for work because they're emailing me” (producer)

### The financing of productions

Financing productions was also said to be becoming more and more difficult. A greenlight from a commissioner was said to only give a certain amount of the finance required to make a show. There also appears to have been a change in budgets for the commissions which are being made - interviewees often cited fewer band 4 productions and more in band 2. The production budget banding in HETV breaks down as:

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<sup>1</sup> Reported in <https://www.televisual.com/news/survey-72-of-true-indies-at-risk-of-closure/>



HETV Band Categorisation	
Band	Budget (per hour of produced TV)
Band 1	> £1.25m
Band 2	£1.25m-£3m
Band 3	£3m-£8m
Band 4	above £8m

Some mentioned the HETV financial model moving more towards that of feature films; interviewees highlighted an increased level of deficit funded shows and the impact that has on production companies who have to shoulder much of the cost of a production.

That coincided with issues of rates of pay (discussed in more detail later in this report) which were seen to remain very high and yet to catch up with the smaller budgets on offer. Conversations in 2024/25 included the potential movement of productions to Budapest due to the cost benefits compared to producing HETV shows in the UK. The loss of BBC daytime continuing drama, Doctors, was also mentioned frequently as yet another example of how drama ‘nursery slopes’ were disappearing.

### The increased level of uncertainty

The level of uncertainty which appears to have entered the HETV industry at the present time is difficult for the workforce to manage. Reading and hearing about redundancies and production companies closing down made it obvious to interviewees that the industry was enduring an amount of pain. With production and post-production companies closing, there was an understanding that the freelance pool would become more competitive at a senior level as more people were moved out of paid employment.

In this climate, it is said to be harder to maintain a career path, that it is challenging to keep up with all the rapid changes in the industry.

“It's hard to plan, it's hard to see a future, it's hard to understand where things are going” (producer)

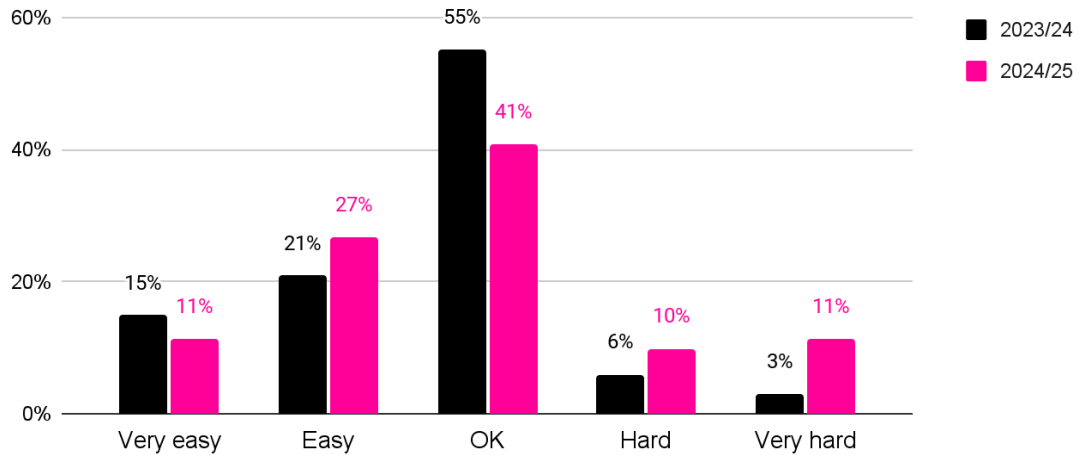
Amongst those interviewed (which generally included line producers, heads of production, production managers, etc.), work has been harder to find in their preferred genres in 2024/25 compared to the previous years. Those who claimed to have found finding work ‘hard’ or ‘very hard’ doubled year-on-year from 9% to 21%.

“From my personal experience, the last 12 months have been the worst in my career ... even worse than the previous year, which I thought was bad enough with American strikes” (production manager / supervisor)

That said, the vast majority (79%) found finding work ‘ok’, ‘easy’ or ‘very easy’.

Over the last 12 months, how has your experience been of finding work in your preferred genre(s)?

Over the last 12 months, how has your experience been of finding work in your preferred genre(s)?



Base: HETV Industry/support participants (2024/25 n=71, 2023/24 n=67)

Those who have had none or little work in 2024 could be using their savings to hold out until demand returned. In one example, an interviewee was forced to use money they had allocated as a deposit for a house purchase. Many interviewees talked about crew members they knew or had heard of leaving the industry to find work elsewhere. This loss was felt to be indiscriminate; that ‘good people’ would be gone. Interviewees lamented the lack of financial support available for freelance crew. Although financial support is outside of the remit of the HETV Skills Fund, this context feels important to note within this report.

“It would have been useful to have financial support to help some people through”  
(senior business leader)

A lack of work for senior crew and not just junior crew was also highlighted as being a very different environment compared to previous years.

“But now we're at a point where really experienced people who have had their own companies or whatever aren't working. And that's quite terrifying I think” (director of / head of production)

It was clear from conversations that connections and relationships have become ever more important when there is less work available. Accepting the industry is still reliant on informal recruitment - that jobs are often awarded without a proper interview process - there is seemingly a reluctance for crew in general to admit their real struggle for fear of making themselves appear less employable in a more highly competitive market.

It was noted also by interviewees that higher availability levels of crew would invariably mean those with most experience would be considered above those with less experience.

This point was also brought up in conversation around how it could negatively impact the opportunities for more diverse crew to be considered. More generally, there was concern over the welfare of crew in moving from a period where crew are in high demand to one where they are in lower demand.

As an example, one interviewee highlighted being 'ghosted' by a production company after discussions to come back to work on a returning series.

"They [production company] just completely ghosted me - and I'm massively shocked" (line producer)

### Positive signs for 2025?

There were some positive signs from interviewees as to the prospects for 2025 - some greenlit shows, positive conversations and new work enquiries. However, others suggested the demand for HETV would not pick up until 2026. The phrase "survive to '25" was now seemingly being surpassed with "stay in the mix 'til '26". An interesting point was also made about the impact being more severe among technical crew as production and craft departments would be the first ones back in to prep when production demand did increase.

"But even if they're starting to move in development, that's still like probably a year on before actual production starts again" (director of / head of production)

For others, the downturn was seen more positively. They described the industry feeling like it was returning to a period similar to the mid to late 2010s - with smaller budgets which would require more creative thinking to make things 'work' and be ultimately more rewarding. Tighter budgets were also said to help people really think about what they were asking for from a resource point of view. Anecdotally, less work has also allowed productions to negotiate down prices with studios.

It was also obvious that crewing up has been easier in a period of slow activity. There was also suggestion from some interviewees that the downturn would create more meritocracy - that it would weed out those who are less good at their jobs.

"So on a positive note, honestly, we had the pick of the bunch" (production manager / supervisor)

There was a counter view to this, that 'good people' might leave the HETV industry permanently. Others suggested there are now potentially opportunities for independent British TV and film in the wake of fewer big US commissions. This in turn could open up career paths which include more of a portfolio of formats and genres, thus making crew more rounded and experienced.

### The impact on junior crew and new entrants

Junior members of the workforce have not been included in the HETV Skills Fund research but the plight of junior crew was uppermost in the minds of some interviewees. Concerns were raised around crew who had recently joined the industry - in a boom time - and would

now be suffering from the downturn having never experienced this before. It was frequently mentioned that once crew could 'get to 5 years' of experience they would be 'ok'.

Furthermore, concerns were raised a number of times over how the impact on junior crew might disproportionately impact more diverse crew who had been encouraged into the industry in the last few years. The ability to stay in the industry was felt to very much depend on the level of support and savings accrued.

New entrants, those who were highlighted as coming from 'Generation Z' - were also brought up in conversation as being harder to understand by those in more senior positions. There appears to be a lack of verbal communication, an over-reliance on WhatsApp, and a general lack of basic work skills and a lack of willingness to take responsibility. It was suggested that new entrants with some previous work experience would have a much better time working in HETV production.

"I would have to train people to be able to answer a phone or to go to the post office. Just really basic work skills that they could have learned if they'd temped in an office for a year ... or even if you've worked in a shop. If you get someone who's worked in retail, they make really good ADs, it's a really good transferable skill" (production manager / supervisor)

There was a strong sense from interviewees that the focus of support in the current climate should be on mid-level crew and not on new entrants. It was felt that new entrants were being encouraged to enter an industry when there is little work for them.

"There are a lot of trainee programmes but then lack of help keeping these trainees in the industry to move on to further roles" (production executive)

"Bootcamps and introductory schemes are generating a large number of new entrants but there are not enough roles or mentors to support their early years training. Their hopes are being raised and dashed" (senior business leader)

"Entry level training schemes are useful but in the current climate more focus needs to be placed on retaining and supporting existing staff in the industry rather than encouraging new joiners" (senior business leader)

## High rates of pay vs the decline in demand for crew

Market forces might suggest that moving from more of a sellers' market (where crew are in high demand) to a buyers' market (where crew are in lower demand) would have an impact on rates of pay. However, many interviewees commented on the continuing high levels of pay expected by crew, in spite of a slowdown and reduced budgets. It should be remembered that most of the sample for this research were in senior and/or hiring positions and any comparative view from more junior crew is not represented within this report.

Some interviewees even suggested that there was a wide disparity in the expectations of pay by department and by grade. Bectu ratecards were seen to bring some challenges when crew treated them like a "legal document" as one interviewee suggested. These ratecards can sometimes be perceived as inflexible - for example a band 2 rate applying to a

production from £850k to £3m per hour when there is a very wide range of budget within that band.

“I think the biggest issue for me is having crew that understand homegrown productions can't compete at the same level” (line producer)

Some departments and teams were also said to be more unionised than others which could lead to difficulties and disparity in rates of pay across departments. Departments which were cited as being more unionised included: lighting, grips, electricians, camera and sound. Other departments - such as costume and production - were said to be less bullish about rates of pay which exacerbated the disparity between departments.

“2nd assistant camera are ruthless” (producer)

“Sound have been incredibly pushy about their rates as far as I'm concerned. Ridiculously. Especially boom ops ... electricians are pushing for a massive increase of their rate from next year and the best boy asking an incredible 30% on top” (director of / head of production)

Generally, it was claimed that crew did not appreciate that budgets were now smaller than they had been. Situations where crew were coming from a higher band show to work on a lower band show were said to bring the higher band pay expectations with them.

“I don't think the crew have necessarily clocked ... they don't realise that or they're not reading enough to understand that budgets are shrinking” (producer)

Rather than reduce pay, hirers claimed to be trying to keep rates on par with last year, avoiding further increases. Anecdotes of productions being 'outed' by certain branches for not paying the expected rate have resulted in problems between productions and crew. In another anecdote, a production decided to move ahead without a best boy due to unrealistic pay expectations where the best boy was asking for more pay than a gaffer. For a small number of interviewees, the high cost of production in the UK has led them to thoroughly investigate shooting in places like Budapest and elsewhere in eastern Europe.

Overtime was another contentious pay issue and being able to find dailies was claimed to have been an issue due to e.g. electricians having to take full-time employment outside of the industry. Expectations over the size of teams required have also been cited as issues between hirers and crew.

## Changes in the perception of skills-related issues

When asked about the overall picture of **skills-related issues** in HETV production in the UK, the research participants in 2024/25 suggested a very different picture compared to recent years.

Specifically, participants are asked to consider:

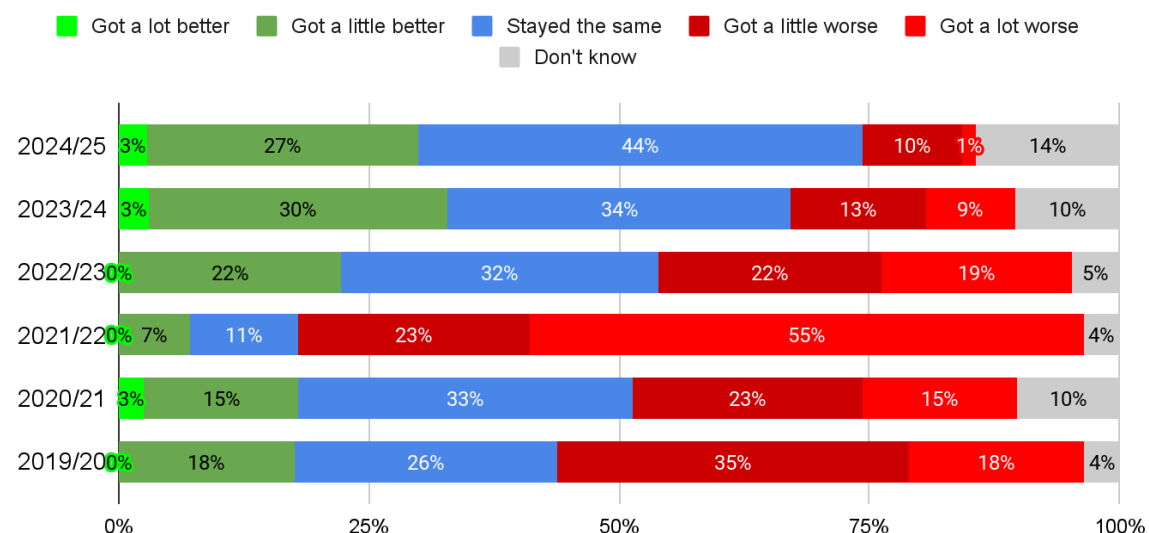
- Skills shortages - a physical lack of crew available for work
- Skills gaps - a lack of skill and experience in the crew who are available

In the 2024/25 research, 11% of participants claimed the skills issues had 'got a little worse' or 'got a lot worse'. This continues the significant downward trend of this statistic - roughly halving each year from 22% (2023/24), 41% (2022/23) and 79% (2021/22). Conversely, 30% of participants suggested the skills issues had 'got a little better' or 'got a lot better' in 2024/25, which was on par with the previous year (33% in 2023/24). A significant proportion (44%) suggested the skills issues had 'stayed the same', an increase of 10 percentage points compared to the previous year.

Whilst this might appear to be at odds with the generally more negative outlook, this data is specifically related to skills shortages and skills gaps rather than the general sentiment around the health of the industry. As shall be seen later in this report, both these skills-related issues have been seen to be far less severe in 2024/25 compared to previous years.

Thinking of all the issues related to skills in HETV production in the UK (ie. shortages and gaps). Over the last 12 months, do you think these issues have generally:

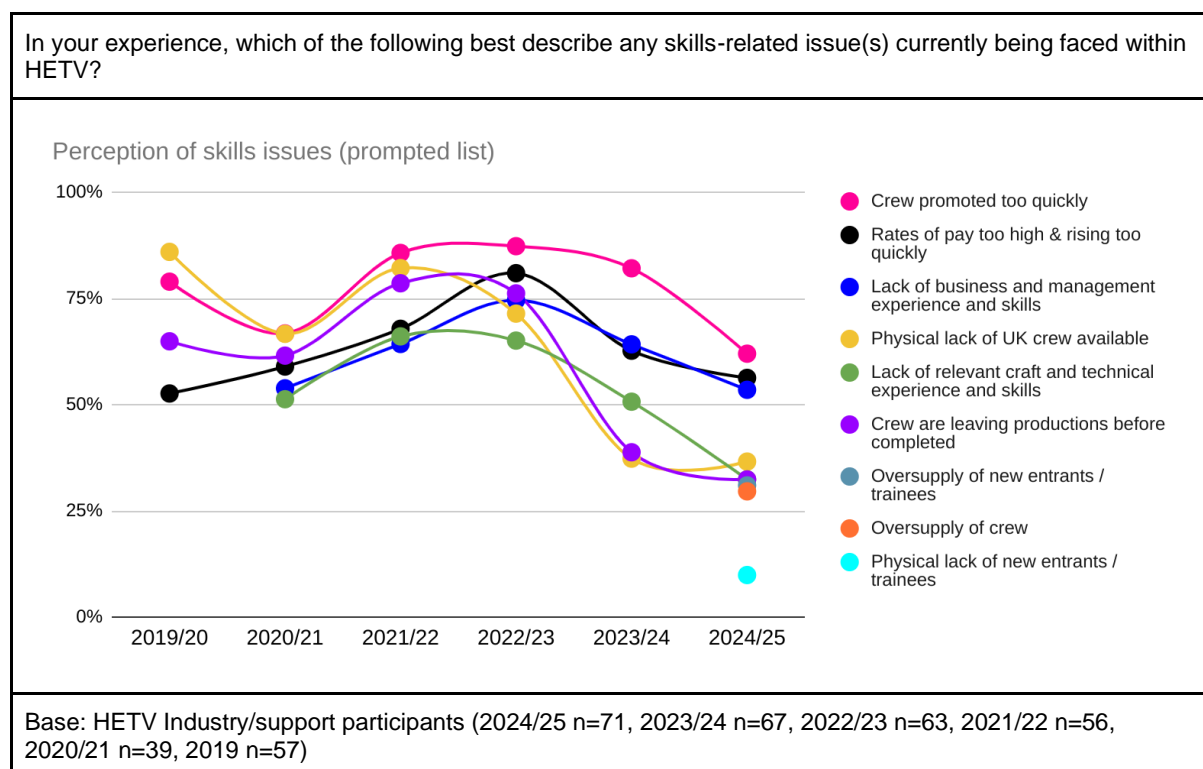
Perceived change in skills issues over last 12 months



Base: HETV Industry/support participants (2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

## Skills-related issues

Tracking the various key issues which relate to skills over time, it is clear that these more specific problems have continued to abate in 2024/25. However, whilst true, the main issues remain the same; that crew are promoted too quickly, rates of pay are too high and there is a lack of business and management skills and experience.



Two new options were added to the survey in 2024/25 in order to understand the level of oversupply of crew in the market as well as an option to understand the skills shortage specifically regarding new entrants and trainees. From this data it is clear:

- There has been very little issue with a lack of new entrants and trainees in the HETV industry, cited by just 10% of participants
- Oversupply of crew generally - and specifically oversupply of new entrants and trainees - each stand at around the 30% mark. In fact, combined 55% of the sample suggested some kind of oversupply issue.

When asked specifically about the oversupply of specific roles/grades, participants suggested:

- New entrants, trainees
- Production department
- Roles right across the board
- Producers, assistant producers

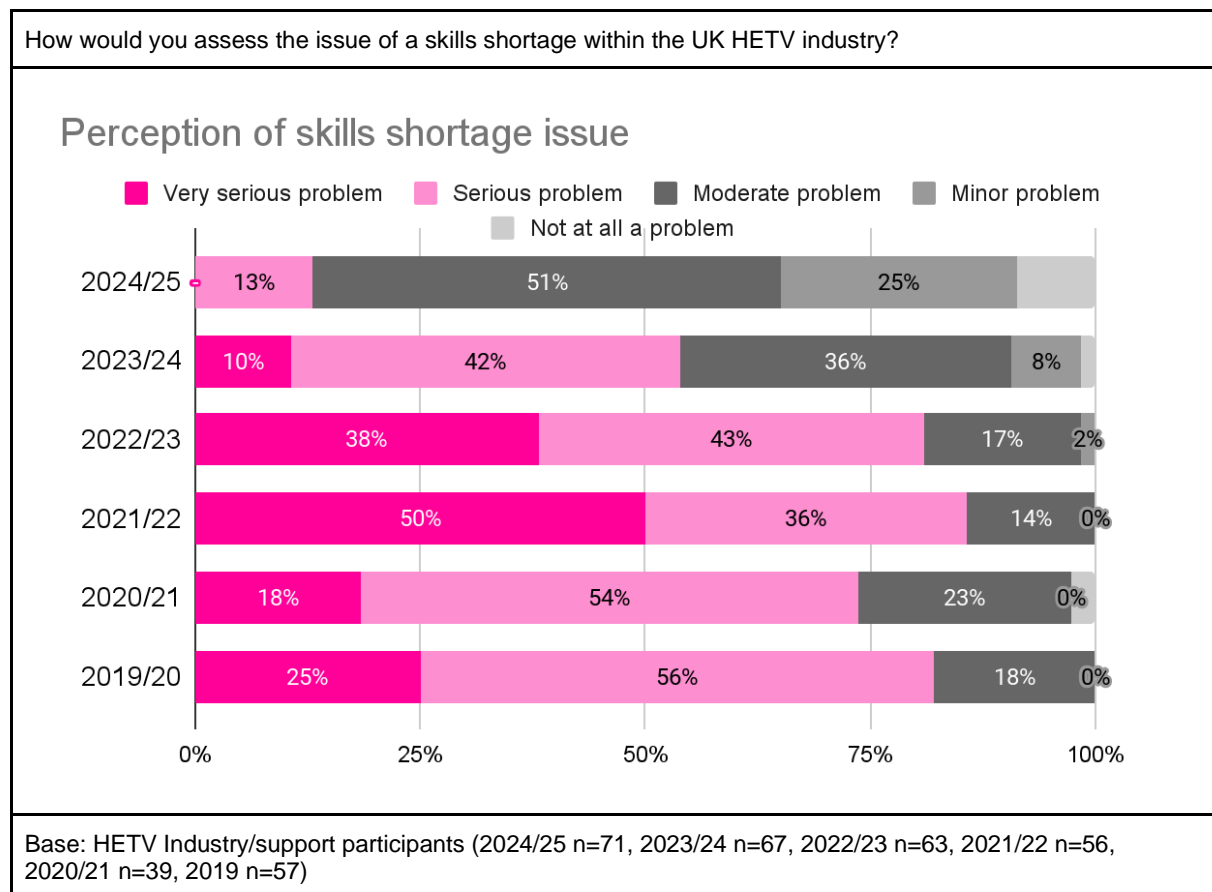
The issue to have seen the highest proportional decrease in 2024/25 is “Lack of relevant craft and technical experience and skills” which fell from 51% to 32%. This suggests that the HETV industry perceives specific job-related skills gaps as less of an issue than business

and management related skills - the latter decreasing less significantly and remaining one of the most pressing issues across the board.

## Skills shortages

The severity of the skills shortage issue in 2024/25 has reduced dramatically compared to the previous year, which in turn, saw a significant decrease from 2022/23.

Participants are now far more likely to see the skills shortage issue as a 'moderate' or 'minor' problem than they are to see it as 'very serious' or 'serious'. This evidence shows that the downturn in demand for HETV production means that there is less supply of crew; that the lack of availability of crew is far less likely to be an issue for the industry, at least until demand for production starts to increase again.



Whilst the severity of the skills shortage issue has reduced over the last two years, there remain a significant minority of research participants who have experienced problems in finding crew.

In terms of the specific grades in short supply, the following list is ranked on the most frequently mentioned in 2024/25:



<b>% of survey participants who mention specific grade shortage</b>	<b>2024/25</b>	<b>2023/24</b>	<b>2022/23</b>	<b>2021/22</b>	<b>2020/21</b>	<b>2019</b>
Production accountant / payroll accountant	27%	37%	60%	50%	67%	63%
Production coordinator	21%	22%	43%	36%	38%	42%
Location manager / supervising location manager	20%	31%	44%	32%	51%	46%
Line producer	13%	34%	51%	39%	28%	40%
Editor / 1st, 2nd assistant editor / assistant editor	13%	31%	40%	18%	13%	24%
Production secretary / APOC	13%	1%	10%	5%	8%	12%
VFX editor / supervisor / producer / animator	11%	15%	17%	14%	-	-
Art director / supervising art director / standby art director / art dept	11%	6%	25%	14%	9%	7%
2nd AD / crowd 2nd AD / crowd supervisor	10%	10%	13%	13%	3%	12%
VFX production manager, coordinator, assistant, non-specific	10%	10%	-	-	-	-
Costume designer / supervisor / buyer / maker / non-specific	10%	6%	21%	12%	3%	5%
Production office (non-specific)	8%	15%	16%	16%	-	-
Grip / assistant grip	8%	12%	27%	27%	10%	23%
Electrician / assistant electrician	8%	4%	8%	5%	10%	11%
Production manager / supervisor	7%	24%	32%	23%	36%	18%
Camera operator, assistant / focus puller / 1st assistant camera / DIT / non-specific	7%	9%	12%	9%	5%	4%
Post-production (various)	7%	7%	-	9%	-	-
Financial controller	7%	6%	13%	2%	10%	4%
Carpenter / construction / construction manager / set decorator	7%	3%	6%	10%	6%	11%
1st AD	6%	16%	35%	30%	18%	30%
Accounts non-specific	6%	16%	13%	4%	-	-
Post production supervisor / producer	6%	13%	24%	9%	-	-
Producer	6%	12%	29%	16%	18%	19%

Script editor / supervisor / coordinator	6%	6%	13%	12%	13%	12%
DoP	6%	4%	6%	2%	8%	4%
Archive researcher / producers	6%	1%	-	-	-	-
Director	4%	7%	10%	2%	10%	7%
3rd AD / non-specific AD	4%	6%	3%	-	-	-
Gaffer	4%	4%	8%	5%	3%	7%
Hair, make-up designer / artist / make-up team / dailies	4%	3%	6%	7%	5%	-
Unit manager / transport captain	4%	1%	8%	5%	3%	9%
Sound designer, editor (including assistant) / effects / recordist / foley editor / dialogue editor / music editor / sound team	3%	12%	8%	12%	-	-
Location coordinator / location scout / assistant LM	3%	3%	6%	9%	3%	-
Assistant production accountant	3%	3%	14%	4%	5%	19%
Rigger	3%	1%	2%	4%	3%	5%
Data manager / data wrangler	3%	-	-	-	-	-
Associate producer	3%	-	-	-	-	-

This data highlights the further reduction in specific grade shortages in 2024/25 compared to previous years. A number of key shortages have reduced significantly in 2024/25, including:

- Production accountant
- Location manager
- Line producer
- Editor (including assistant editor)
- Grip
- Production manager
- 1st AD
- Post production supervisor
- Producer

However, in spite of an overall trend of reduction in shortages, there are particular grades which stand out as those which have increased:

- Production secretary / APOC
- Art director, standby art director
- Costume designer
- Electrician

There were also a number of grades for which the level of shortage appears to have remained static year-on-year:

- Production coordinator
- 2nd AD
- VFX production manager, coordinator, assistant
- Financial controller
- Script editor, script supervisor

New grades to appear on the list in 2024/25, albeit in very low numbers are: data manager, data wrangler and associate producer. Asked specifically about new roles emerging in the HETV industry, participants suggested the following:

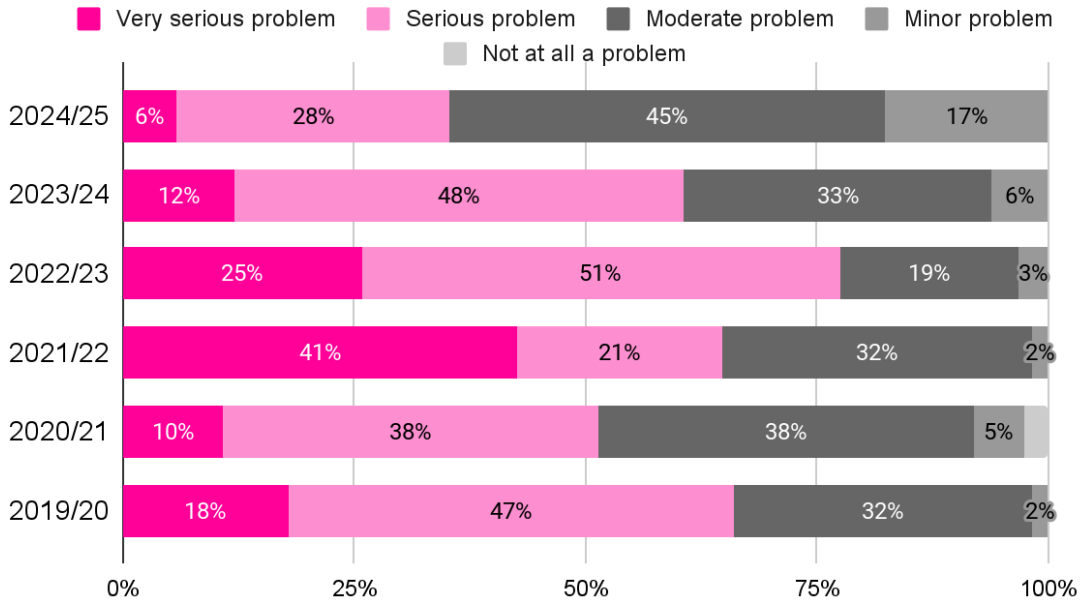
- Access coordinator
- Welfare coordinator, officer
- Action prop buyer
- Intimacy coordinator
- Sustainability coordinator
- Truck supervisor
- Training manager, coordinator
- DIT
- Various assistant grades such as:
  - Archive assistant
  - Edit assistant
  - Assistant costume designer
  - Assistant graphic designer
  - Assistant prop master
  - Assistant stunt coordinator
  - Cast assistant

## Skills gaps

The skills *gap* issue - related to the level of skills and experience in the available crew - has also seen a decline in its severity in 2024/25. Compared to 2023/24, the percentage of participants who see this issue as 'serious' or 'very serious' has reduced from a majority (60%) to a third (34%). Whilst this data looks to be a positive shift for the HETV industry, it does exist within the context of an overall gloomy outlook of relatively low demand and future uncertainty.

How would you assess the issue of a skills gap within the UK HETV industry?

Perception of skills gap issue

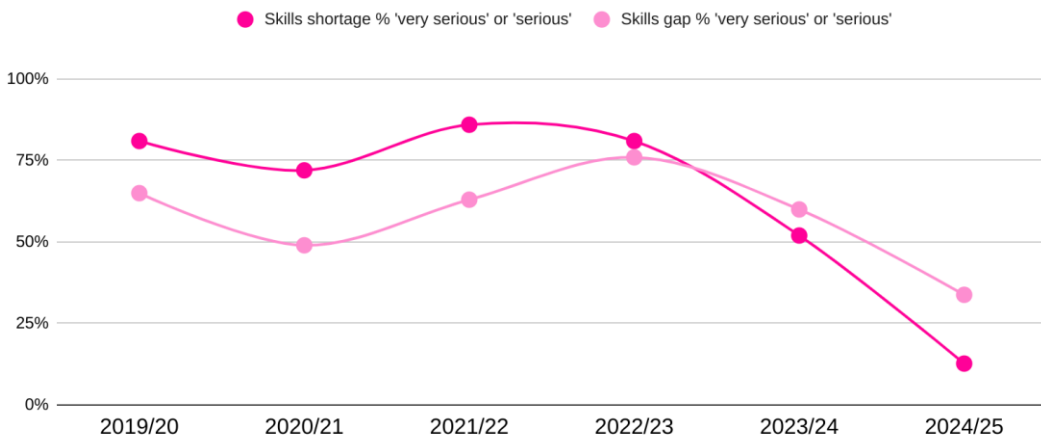


Base: HETV Industry/support participants (2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

The severity of the skills gap issue has reduced at a slightly slower rate than the skills shortage issue. Historically, the shortage issue was seen to be more severe, but for the second successive year, the skills gap issue has been perceived as a more serious issue, albeit at a much lower level compared to previous years.

Seriousness of skills shortage and skills gap issues over time

Perception of skills gap vs skills shortage



Base: HETV Industry/support participants (2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

Interviewees are able to provide more detail and context on both the skills shortage and skills gap issue, which are very much intertwined. To maintain the quality of the HETV product in the UK, productions need the crew, but crucially the right type of crew.

“It’s not that we can’t find anybody, we just can’t find the right people” (head of / director of production)

The quality of production accountants has been a common issue in the latest round of conversations, notably the impact that this role has on the whole production department. There is a call for accountants to gain a better understanding of production.

“I really struggled to find a really good production accountant and, when I did find one, she was struggling to find some decent assistants” (line producer)

Elsewhere, interviewees highlight that there might be a lack of experience for particular sub-genre, for example costume and make-up skills in period drama. Unfortunately, it has been suggested by interviewees that crew are potentially over-stretching their skills and experience for work.

“It’s taken us a lot longer to find the right level of people because what we’ve noticed is lots of people claim to be able to do the job, and may even have the experience to do the job, but once you put them in this environment, they’re not necessarily surviving ... when there was a boom, everybody got the right level of experience on paper, but it doesn’t necessarily translate” (line producer)

“Unfortunately, what we’ve got is a pool of people now with credits on their CV that really probably are quite misleading” (line producer)

“We had supposedly very experienced supervising location managers who were incapable of managing their budgets and actually finding it difficult to manage the size of the team that they had” (head of / director or production)

More generally, one of the biggest struggles with plugging skills gaps appears to be in encouraging those who really need more experience and training to recognise this in themselves and to seek out help. It would appear that in many cases, there is a lack of awareness - or potentially a lack of willingness - of an individual crew member to accept when their skills and experience are lacking. In a freelance industry which is becoming increasingly competitive, this particular issue appears to be highly relevant. An example given to help tackle this is the ‘advanced training’ offered by the HETV Skills fund which aimed to reposition training at a higher level of crew.

Another factor affecting the level of skills and experience in the workforce is the narrowing of job roles over the last few years as teams have increased in size. For example, it has been suggested by interviewees that those who have gained their skills and experiences from

working mainly on larger-scale band 4 shows can find it challenging to work effectively on a band 2 show where the team size is smaller and there are different expectations over job responsibilities and ways of working.

The early stepping up issue, which has been a key theme of the Skills Fund research over the last few years, was also raised frequently in 2024/25. One relevant point made was the difference in the size of the 'gaps' between roles. The implication here is that, for example, stepping up from production secretary to APOC, or from APOC to production coordinator is a smaller jump than from APOC to production manager. This is seen to create bottlenecks and shortages and may explain why production secretary and APOC have seen an increase in shortages in 2024/25 against an overall backdrop of a reduction in skills shortages.

There are also regional nuances within skills issues. North Wales was given as an example, where due to new studio space is said to have become a lot busier and so a number of skills shortages have emerged within the region.

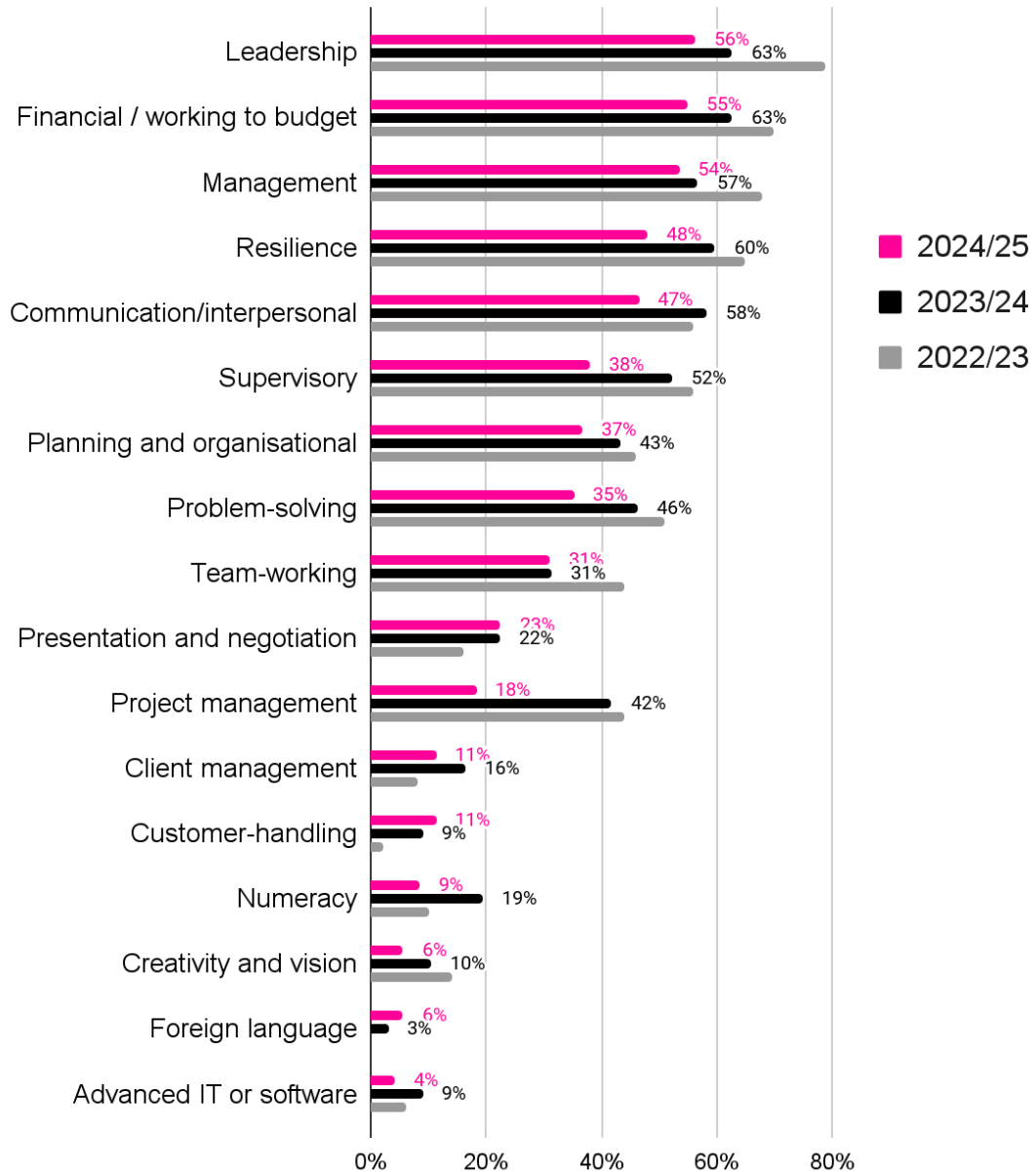
### Specific skill gaps

Investigating the impact of the skills gap issue further, the Skills Fund research allows for the examination of specific skills within the HETV industry. There has been a general decline in the level of specific skills gaps, although a number of them remain an issue for the majority of the research sample, specifically: leadership, financial / working to a budget and management. In particular, management skills have seen less decline in terms of perceived skills gap vs 2023/24 data. As with previous years' research, interviewees in 2024/25 have frequently noted the lack of good management and budgeting skills among certain HoDs.

Skills gaps to have declined more significantly include resilience, communication, supervisory and problem solving skills. The skills gap in project management has also reduced significantly, by more than half compared to the previous year.

Which of the following skills do you find are lacking in particular among crew you are hiring at the moment or in the recent past?

### Specific skills lacking in HETV crew



Base: HETV Industry/support participants (2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

### Virtual production

A specific area of interest for The HETV Skills Fund research over the last few years has been virtual production methods. In previous years, the general feedback from research participants has been that they are aware of such methods but have had limited experience

of using them. In the past, interviewees have also perceived such methods as being prohibitively expensive and useful for only certain types of project or subgenre; *The Mandalorian* has often been the go-to reference for virtual production (a series which was first produced 5 years ago).

In 2024/25, this lack of knowledge and understanding of virtual production certainly persists among some interviewees. There is frequent mention that virtual production methods are too expensive or that they might not be suitable for certain high-end TV productions, in particular, those on a relatively low budget. This would suggest that these new types of techniques are being overlooked by many.

“There's all sorts of ways that it [virtual production] could be used that people aren't yet experimenting in because they only think *Mandalorian*, they only think sci-fi, they only think driving plates, they only think airplane shots or clouds” (anon)

However, there is definitely more anecdotal evidence in 2024/25 of participants having had some experience in using virtual production methods. This might be attending a demonstration in a virtual production studio, participating in a course, but also real experience of using such methods on shoots. Among this group, there is generally more appetite and excitement around the prospect of using virtual production.

From conversations with interviewees, one of the most common ways of using these methods has been for shooting driving scenes. Another anecdote was given around the use of virtual production for a returning series where lessons from series 1 were learnt in order to make the experience much more positive for series 2. On the whole, the experience of using virtual production seems to have been positive, although one or two interviewees have clearly had disappointing results.

“We had a bit of a disaster the first time [using virtual production]” (head of / director of production)

“A client had a very bad experience and the material that came to us was unusable”

There was recognition amongst a number of interviewees that there appears to be a skills and experience gap in understanding how and when virtual production methods can be applied to a script. Potentially, this is an opportunity to educate and train more senior creative, editorial and production people.

“The main problem we found is in convincing creatives” (head of / director of production)

“There was a lot of resistance creatively about it” (head of / director of production)

“Honestly I think a lot of people are scared of it” (producer)

It was also recognised by some interviewees that using virtual production requires a very different way of working, For example, the need to make more decisions in advance - described as “reverse thinking” - and how this can be a challenge when scripts can arrive



with little time for contingency. There was also a call from this research for virtual production studios to gain a better understanding of how HETV works.

In more of a minority, there were more negative feelings towards virtual production, for example that it might be more of a passing phase. Others suggested it still lacks the quality or authenticity compared to shooting a real location, or in some way that it's cheating the audience.

“There's an ick about it that makes me feel ... it's a bit of a cheat and it should enhance your production rather than being a shortcut” (production manager / supervisor)

“It's [virtual production] not the be all and end all” (anon)

“People see it [virtual production] as a golden goose” (line producer)

## Overall support for the HETV industry

With the obvious overall downturn in demand for HETV production in 2024, research participants pointed to the need - and also the lack of - financial support for freelancers who are out of work. One interviewee mooted the idea of an insurance scheme for freelancers to pay into in order to access financial support when needed.

Aside from financial support, a number of participants noted, as has been the case in previous years' research, that the varying schemes and support on offer from a wide range of organisations can be difficult for them to navigate.

Evident from conversations with interviewees, there are more and more training schemes and support opportunities opening up, from government bodies, studios, streaming platforms as well as from organisations such as ScreenSkills, BECTU, screen agencies and alike. The 'support landscape' appears to be getting more complex, or more "muddy" as one interviewee suggested. It can be hard work to discover and understand exactly what is on offer to a production.

**"If you do the research, you know, you can find quite a lot of things ... but I think the problem is that it's still quite fragmented" (production executive)**

A central hub or point of contact to collate and communicate all the opportunities for support on offer to HETV would be welcome. This point is compounded by the increasing number of newly eligible productions for the High-end Television Tax Relief scheme who are using the Skills Fund and other support organisations for possibly the first time.

## Feedback on the HETV Skills Fund

The vast majority of interviewees were highly positive towards the HETV Skills Fund and the impact it has had on the industry. Superlatives included it being "critical" to the industry and "invaluable" as a source of training.

**"I love ScreenSkills, I think they're brilliant" (head of / director of production)**

**"Like anyone, they've received cuts and I think they're doing a brilliant job" (head of / director of production)**

Trainee Finder and Make-a-Move were, as with previous research, the most frequently highlighted schemes. It was noted positively that production office trainees were reinstated on the Trainee Finder scheme. Make-a-Move was also discussed as a scheme from which interviewees had personally benefited as well as a very important way to tackle skills shortages within the industry. Moving people up or from another genre to HETV in a structured and supported way clearly seemed to be fulfilling a key need for many interviewees.

Training such as leadership and management skills training was also given high praise; another scheme seen to be highly relevant to today's workforce. Other courses, such as mental health training and anti-harassment and anti-bullying were also mentioned positively. There was a sense from conversations that the Skills Fund was effective at responding to

the needs of the industry in terms of training provision. Bursary support was also highlighted as a very effective way for crew to be able to design a more personalised level of support specific to their needs.

The ScreenSkills website was highly regarded as a source of key information and a large number of interviewees claimed that they often pointed people to it as a way to better understand HETV.

The HETV Skills Fund team was also very highly regarded with a number of individuals mentioned. The sense that the team is 'always there if you need them' came through clearly.

**"A friendly face that people know they can talk to who's approachable is invaluable"  
(head of / director of production)**

In terms of communication, the newsletter was seen as a good way to keep on top of current opportunities. A small number of interviewees mentioned receiving a 'live document' from the HETV Skills Fund team which detailed all of the programmes and support on offer from the fund<sup>2</sup>.

**"This year there was a booklet<sup>2</sup>. So as soon as we registered the production, there's a booklet with all the different incentives and schemes ... before, it [Skills Fund] felt a bit like, I don't know, a sort of a secret thing you had work out" (production manager / supervisor)**

There was also a strong sense that those in industry wanted to help support those coming through from more junior positions and also, more specifically, a willingness to help the HETV Skills Fund because of benefiting from it personally in the past.

**"Another reason I'm helping [HETV Skills Fund team] is because they helped me"  
(producer)...**

Flexibility was also appreciated, for example in being able to nominate trainees for Trainee Finder or being able to access Make a Move for fixed-term contractors working on a single HETV production.

From a more strategic point of view, the HETV Skills Fund was praised for having more focus on supporting existing crew than on bringing new entrants into the industry. In times where work is more scarce, organisations which focus on driving new entrants into the industry were criticised because there was not necessarily the level of work available to support them.

Return on investment was also an important factor raised in light of less available work and perceived tighter budgets. A number of interviewees mentioned the need to ensure they felt they were getting back from the fund what they were putting in.

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<sup>2</sup> This 'live link' documentation has been available for all productions paying into the HETV Skills Fund for the last 6 years.

“What you're getting back for the money you're putting in is important” (line producer)

“The money we've put in, we've had a great deal of it back and benefitted from some great people” (line producer)

The recent regional presence of the HETV Skills Fund was another initiative which was noticed by interviewees and given high praise.

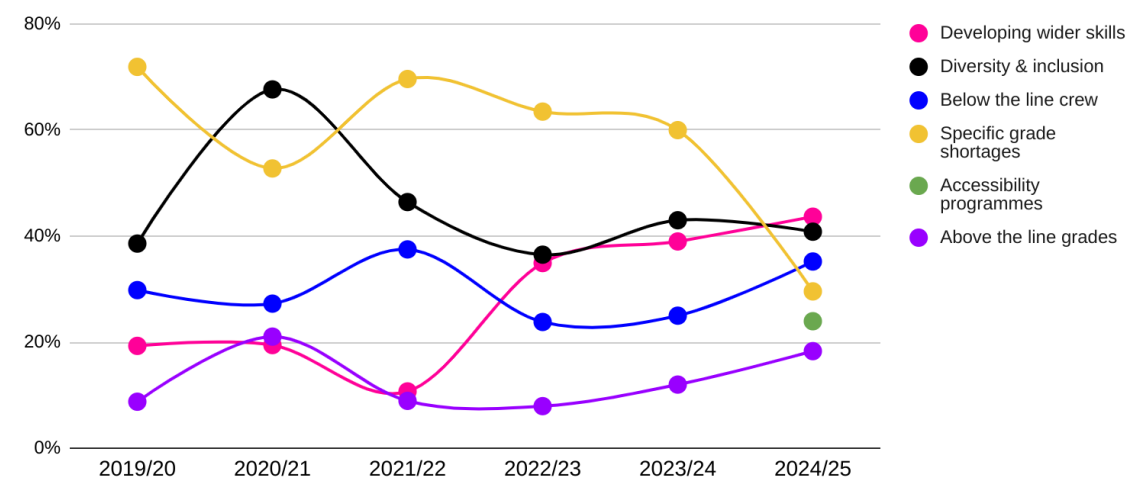
## Priorities for the Industry

A large reduction in the need to tackle specific grade shortages - from 60% in 2023/24 to 30% in 2024/25 - was a key shift in the way research participants perceived the priorities for the HETV Skills Fund. This is in line with the reduction in the perceived severity of the skills shortage and skills gaps issues and in how interviewees commented on the relative ease of finding good crew. It seems logical to suggest, however, that tackling specific grade shortages would return to nearer the top of the list of priorities if demand for HETV production increases in the future.

Developing wider skills, encouraging greater diversity and inclusion and supporting below the line crew are the main priorities suggested by research participants for 2024/25. From interviewees, the need to help junior crew get to their 5 years of experience appears to be of great importance.

Now thinking about where you would like to see the HETV Skills Fund be invested in the HETV industry, please rank the following areas from 1 (most important) to 6 (least important) in terms of where you would like to see investment being made in skills and training...

HETV Skills Fund investment: ranked #1 or #2



Base: HETV Industry/support participants (2023 n=67, 2022 n=63, 2021 n=56, 2020 n=39)

In terms of diversity, equality, inclusion and accessibility, there was a mixed response from interviewees as to the progress being made. Some were frustrated by the slow progress or

lack of progress, whilst others could see large steps being taken in the last few years, for example in the rise and impact of access coordinators.

Some key points raised about these topics during conversations were:

- The need for insight and more understanding of how to address imbalances in the industry
- That much of diversity is non-visible which makes it much harder to identify
- The need to overcome the fear of causing offence by saying the wrong thing or behaving the wrong way. That difficult conversations around these topics were too often avoided and more training is needed to tackle this
- The need for HoDs to be pushing for change and that DEI and accessibility depends on how engaged HoDs are
- The need to raise the issue of accessibility on sets
- A renewed emphasis on socio-economic diversity and diversity of thought (interviewees often citing James Graham's McTaggart lecture)
- The need to meet and connect with a wider range of people when hiring to “at least have the meeting”
- The risk to diversity and inclusion from the reduced workload due to fewer risks being taken when hiring
- The need for a lead organisation in this space to champion DEI and accessibility issues rather than disparate organisations working separately
- That these issues (alongside environmental sustainability) are seen as too much for individual productions to manage, therefore a production may be more inclined to focus on one particular issue
- The need for additional funding to help, e.g. the BBC in-house fund for additional access costs and the risk to tackling these issues from tighter production budgets
- The need for centralised and up to date resources on these issues, an example of which was referenced as being supported by PACT and ScreenSkills

Participants were also invited to give their top three priorities for the HETV Skills Fund as open text comments in the survey. This data has been visualised as a word cloud below:

As the HETV Skills Fund activity is entirely reliant on industry contribution, the funding may decrease in the future if fewer HETV productions are made in the UK. What are the three things the HETV Skills Fund should make sure it prioritises and ensures it can still deliver, even with a smaller budget?

accessibility accountants already areas around available backgrounds best bringing  
 budget bullying bursaries career companies continue courses **crew** date  
 department **development** disability **diversity** eg encourage ensure entrant  
 established **etc** existing film financial focus freelancers **funding** gaps grades groups harassment  
 health help hetv hods improving incentives including **inclusion** individuals  
**industry** initiatives issue job junior keep lack **leadership** level line  
**make a move** management mental mid modules moving needs  
 new entrants offer online opportunities **people** placements plus post practical  
 producer **production programmes** programs progress provide regions  
 relevant respect **roles** schemes share **skills** specific start **step support**  
 sustainability team trainee trainee finder **training** tv understanding upskilling  
 wellbeing **working**

Base: HETV Industry/support participants (2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

In regard to 'training', a word frequently mentioned as a priority for the HETV Skills Fund, specific mentions largely included support for existing programmes:

- Diversity, inclusion and accessibility training to promote change
- Leadership and management training
- Mental health training
- Continued provision of online training modules
- Training for established crew to ensure their skillset is up to date
- Skills shortage training - eg. make-a-move
- Budget and management training for HoDs
- Career progression support for those given training
- Training for specific roles/skills - eg. producer training
- Training for entry level crew
- Training for other forms of content eg. feature film
- More signposting of training opportunities
- Anti-bullying and harassment training
- Sustainability training
- Technical training in new technology

