



James Murray O'Brien (Leaders of Tomorrow cohort #4) on the set of Ellis s.2 in Northern Ireland. Photography: Stefan Hill

High-end Television in the UK
2025/26 workforce research
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Summary	4
Background and objectives	5
Research method	5
Interpretation of findings	6
Use of Artificial Intelligence (AI) in this research	6
Context: the current situation within the HETV industry	7
The percentage of participants in or out of HETV work	7
The experience of finding work over the last 12 months	7
The difficulty in getting an HETV project ‘across the line’	10
The challenge of working with ‘squeezed budgets’	10
A cyclical return to band 2 HETV productions	11
Looking ahead to 2026	12
Changes in the perception of skills-related issues	12
Specific skills-related issues	14
Skills shortages	15
Specific skills shortages	16
Skills gaps	19
Specific skill gaps	21
A renewed emphasis on band 2 productions	22
The ‘COVID cohort’	24
HoDs management skills and budgeting skills	25
Managing Gen-Z	26
Skills in new tech	26
Use of and attitudes toward generative AI	26
Adoption of virtual production	27
Feedback on the HETV Skills Fund	29
Positive feedback from interviewees	29
Priorities for the Industry	30

Summary

- This report contains key findings and data points from the 2025/26 round of UK Skills Fund research within the HETV industry. Data was collected from 74 survey participants and 50 industry representatives took part in a follow-up interview.
- Contextual findings for 2025/26 included continued difficulties in getting HETV projects 'across the line' in terms of funding and a strong feeling that budgets have been squeezed, whilst increases in rates of pay have yet to subside.
- A number of interviewees also highlighted a higher proportion of band 2 productions, relative to bands 3 and 4, and how working on band 2 shows required a certain mindset and set of experiences to make them work.
- Tracking data for 2025/26 - and conversations from many of the follow-up interviews - continued to demonstrate that the severity of the skills-related issues was much reduced compared to the extremely difficult period of 2021/22 and 2022/23.
- That said, there were a number of small 'signals' in the data for 2025/26 of an increased level of negativity. Examples being:
 - A small increase in the percentage of those suggesting the skills issues had "Got a little worse" or "Got a lot worse" - up from 11% in 2024/25 to 18% in 2025/26, more inline with the 22% from 2023/24.
 - The perception of the skills **shortage** issue being "Very serious" or "Serious" increased from 13% to 18%, although this remained significantly below 52% in 2023/24.
 - A slight increase in the level of shortage of specific HETV grades such as production accountants, editors, script editors, 1st ADs and post production supervisors.
- The perception of the skills **gap** issue continued to decrease in 2025/26 - the percentage of those citing it as "Very serious" or "Serious" decreased to 27%, from 34% in 2024/25.
 - Within this, a number of specific skills were less likely to be perceived as lacking in the industry - notably leadership, management and team-working.
- Within the interviews, participants commonly highlighted the need for skills within the HETV workforce to adapt to a higher proportion of band 2 productions.
- A particular cohort within the workforce was identified as having a general lack of skills and experience due to the issues relating to COVID-19 and the subsequent boom period in HETV in the UK.
- A lack of good leadership/management skills and finance/budgeting skills among HoDs were also highlighted as an ongoing issue.
- Generative AI was one area of skills in which the UK HETV industry appears not to have engaged in particularly well. A mix of reluctance and disinterest was common, with relatively few interviewees seeming to engage with AI tools, aside from those in post and VFX.

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 benefit from the UK's High-end Television Tax Relief scheme.

The aim of the HETV Skills Fund is to develop the UK's HETV freelance workforce in terms of its skills shortages and gaps. Regular consultation with industry on the current skills-related challenges specific to HETV and to better understand their current needs is vital in order to deliver impact for the HETV Skills Fund.

Feedback in the form of annual research has been used to inform the HETV Council and its Working Groups since 2017. Research findings from 2025/26 will inform spending in 2026/27.

This report summarises findings from the ninth wave of research.

The objectives, method and scope of the research has remained consistent over time. Key objectives for the 2025/26 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 2026/27 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. Participants were screened to include those who had experience of working on a HETV production in the UK across the previous 12 months.

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

Quantitative: 74 pre-interview surveys completed online.

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

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

The sample consisted largely of those who were directly involved in crewing up productions (eg. line producers, heads of production, producers, production managers), with additional interviews with those in senior roles within production companies.

The 2025/26 sample breaks down as:

- 37% based in London, 16% in the UK Nations and 48% in the English regions (not including London)
- 82% stated “I am currently working on one now” in reference to their recent experience of working on a HETV production
- 74% claimed the main form of production they had worked on in the previous two years was ‘HETV scripted’, with 15% citing ‘HETV unscripted’ and 11% other genres
- 59% were freelance

The interviews followed a very similar set of topics to previous years, consisting of: top-of-mind issues, focus on skills gaps and skills shortages, drivers of skills gaps and shortages, use of new technology, experience of working with the HETV Skills fund, and potential areas of improvement and development for the HETV Skills Fund.

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”.

Use of Artificial Intelligence (AI) in this research

The research setup (including question writing and creating key documents), interviewing, quantitative and qualitative data analysis/interpretation, and the production of reports was all carried out by a human researcher.

An AI tool was used to turn audio recordings of the qualitative interviews into text transcripts, subsequently used by a human researcher in the analysis process.

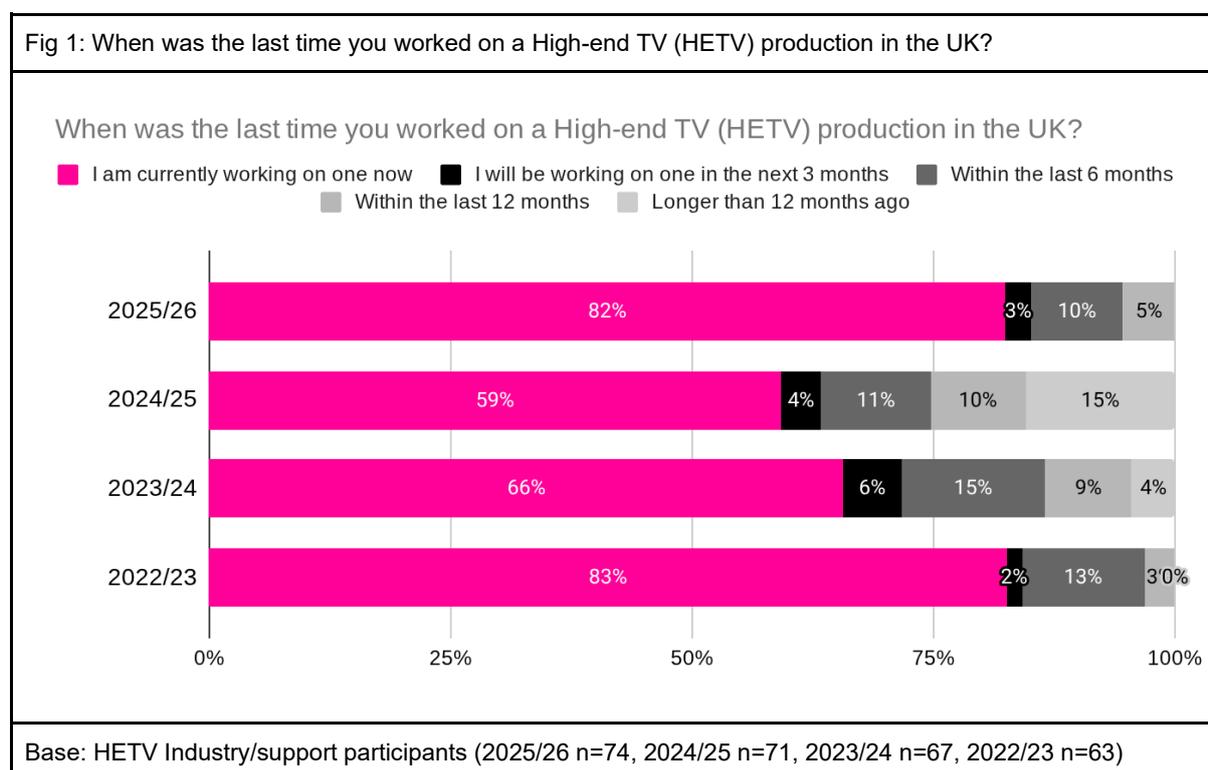
Context: the current situation within the HETV industry

The percentage of participants in or out of HETV work

It is important to note that this research study was not designed nor intended to measure the number of people in the UK HETV workforce currently in or out of work.

However, a consistent question on the survey asked participants when they last worked on a HETV production in the UK. Figure 1 below shows that in 2025/26, the percentage claiming *'I am currently working on one now'* increased significantly to 82%, up from 59% for the previous year, more in line with the data from 2022/23.

Rather than view this statistic as a sign that the industry is returning to a period of higher demand - after a level of real uncertainty more recently - it would be more advisable to use this data to understand and interpret the rest of the findings of this year's study; that those responding were highly likely to be working on a HETV production.



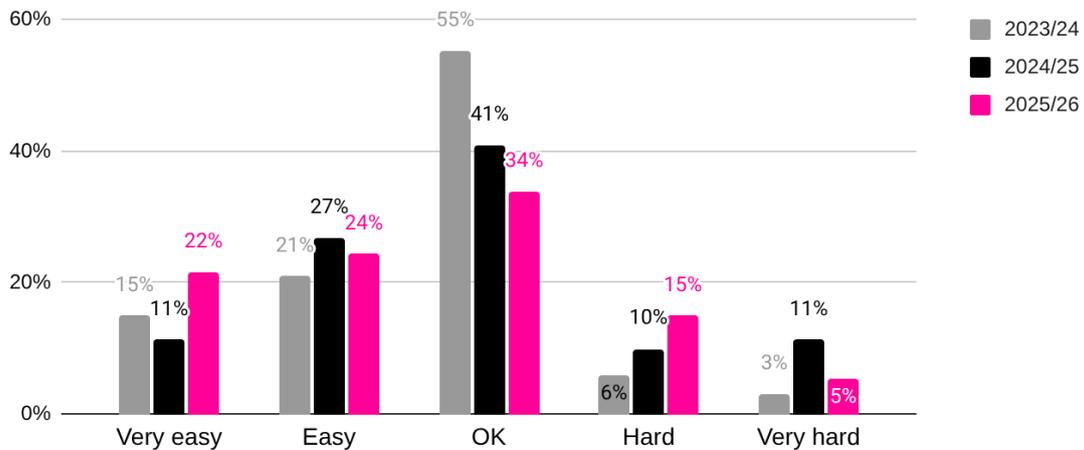
The experience of finding work over the last 12 months

In spite of this high level of employment among the sample, the ease of finding HETV work improved by only a relatively small margin compared to previous years. Figure 2 below shows that the sample was split between those who claimed work had been 'very easy' or 'easy' to find, and those who had found it 'hard' or 'very hard'. Certainly the percentage who claimed work had been 'very easy' to find increased year-on-year - doubling to 22%.

However, the proportion claiming it had been 'hard' also increased somewhat - whilst those claiming it had been 'very hard' reduced by half.

Fig 2: 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)?



"Very easy" + "easy"

- 2025/26 = 46%
- 2024/25 = 38%
- 2023/24 = 36%

"Very hard" + "hard"

- 2025/26 = 20%
- 2024/25 = 21%
- 2023/24 = 9%

Base: HETV Industry/support participants (2025/26 n=74, 2024/25 n=71, 2023/24 n=67)

Expanding on their experience of finding work over the past 12 months, survey participants were asked to provide more detail in an open-ended response. Some of the comments from the range of experiences are outlined below:

Those claiming finding work had been 'easy' or 'very easy':

"As I have many years experience as a Line Producer, I have been lucky in being able to choose the work I do. Many Line Producers are now working as Heads of Production, so my 20+ years of experience in Drama means I know a lot of people and my experience is valued" (line producer)

"Having waited for two delayed projects from 2023-2024, this year has been exceptionally busy" (post production supervisor)

“I am fortunate to have a full time position but have seen a vast increase in high level crew members looking for work who would otherwise be snapped up” (head of production)

“I think there's a lot of scaremongering as the industry hasn't collapsed but there are definitely fewer positions and I'm feeling the worry and frustration from friends and peers finding work” (director of production)

“I've been very fortunate, thankfully. I was working on a project from Nov '24 to July '25 and am due to start my next project in Nov '25 after choosing to take some time off. However, I know a lot of other freelancers haven't been as fortunate finding work in recent years” (production manager)

Those claiming finding work had been ‘hard’ or ‘very hard’:

“I have worked in TV drama for 31 years - in this past year I have been unemployed for 6 months. This is the first time in 31 years that this has happened” (post production supervisor)

“We have many projects that have been greenlit but we cannot fully fund them because of the upward pressures on budgets” (creative director)

“Very hard 12 months in my position as I have had to make over 20 people redundant. We have had 8 HETV productions finishing all this year and only 2 starting so no where for staff to go” (director of production)

“Last job was Nov 24-Apr 25 and it was reduced from a 6 x 60 to 1 x 90. Since then a few calls, requests for CVs and interviews but nothing long term only budgeting HETV and Independent Features for UK and non UK companies” (line producer)

“It's been a very difficult time. I'm currently working on an ad hoc basis for two small production companies and it doesn't bring enough money in. Many of us are experiencing difficulty with the regularity of work which affects confidence” (producer)

Some had also experienced a more positive 2025 vs 2024:

“I have worked the whole year. In contrast, last year I worked four months. I have worked for companies or Producers I have worked with before who have asked me to come back and work with them” (line producer)

Among interviewees, conversations around top of mind challenges in the industry were highlighted by phrases such as ‘feast or famine’, with one production manager remarking that the enduring background feeling of instability was in everyone’s minds, even when busy working on a production. Other observations to come out of the interviews included:

- A regional aspect to the level of demand, some nations/regions felt busier than others

- That long-running or returning series felt like a 'safer' place to be working at the moment
- A need to continue to protect the freelance workforce, the 'lifeblood of the industry' by continuing to support initiatives like the Freelance Charter and Action for Freelancers

There was some sympathy among older, more experienced interviewees for those who were relatively new to the HETV industry; who had joined in the 'boom period' of the previous 8-10 years. It was felt that this newer wave of crew would not have experienced anything like the level of uncertainty that exists currently. As a result, it was felt that this group would not necessarily have managed their finances to cope with an extended period of downtime as they were much more used to moving from job to job.

"So I remember when it was like this, this is how it was when I first started. I think it's come as quite a shock to a lot of people who have been in the industry for maybe like 10 years or even a bit longer. Like who have never known it to be quite this quiet. So I think people have struggled" (line producer)

The difficulty in getting an HETV project 'across the line'

As well as a very common sense of a lack of commissioning - from terrestrial broadcasters and the US streamers across scripted and unscripted genres - it was pointed out by interviewees that the process of getting finance for a greenlit project to the point of starting production has been a lot more difficult and stressful more recently.

"It feels like a battle to get the shows actually to the point where you start prep and then you start the battle of actually making the show. We're all absolutely exhausted by the time we've actually got to that point" (head of production)

The challenge of working with 'squeezed budgets'

A common challenge, highlighted by many interviewees - both freelancers working on productions or employees in production companies - was the size of budgets, relative to rising costs and high and rising rates of crew pay.

Budgets were often seen to be reducing in size, due to rising costs and crew rates. In some instances, it was suggested that returning series could be awarded a smaller budget than the previous run.

However, interviewees perceived that, despite a lower budget, the ambition and scale of the vision for HETV productions had not abated. In turn, this was felt to make the whole nature of the work far more challenging.

This pressure on budgets was manifested most obviously in conversations around rates of pay and budget management by Heads of Department (HoDs). Perhaps what has always been a potentially inflammatory situation - to discuss and negotiate pay and budgets - appears to have worsened with the recent squeeze on budgets.

“It's really stressful because they [HoDs] don't believe. The tech departments, cameras, lights, grips, sound, they genuinely think that they're being really hard done by and you're trying to pull the wool over their eyes and it's really difficult because they're [behaving] very entitled” (line producer)

“And then on the flip side, because you have to pay a certain level of rate, then there's less budget for that department as a whole for any equipment or additional needs. And then once you've negotiated the rates and got everyone locked in, then there's the complaints. Well, there isn't enough money to do X because they've got no money left in the budget” (line producer)

There was a repeated sense among interviewees that understanding of the business model and mechanics of HETV are not well understood or misunderstood by crew.

“I'll be honest, I wouldn't have got it [understood production company finances] when I was a freelancer. The world that I work in now is so far removed from a freelancer ... I didn't know half of what happens in the [production] company” (head of production)

And myths of how production budgets are managed appear to persist.

“I still get people saying to me... they genuinely believe that line producers still get money if you come in under budget. Years ago, say if you came in under budget by £100k, the production company would give you a bonus because that would be part of the production fee. But that just doesn't happen now. It doesn't happen. They [crew], there's a lot of them that genuinely believe that it still happens” (line producer)

“I think that the calibration between the kind of boom period of where you had the influx of Netflix and Amazon paying up above and beyond normal UK production rates. They've stopped doing that but the people haven't necessarily and the agents haven't quite cottoned on to that” (head of production)

A cyclical return to band 2 HETV productions

Linked very much to conversations around budgets, another common theme to come from conversations with interviewees was the relative proportion of band 2 shows in production. A number of interviewees saw the industry returning to the band 2 production, at the expense of band 3 and band 4 shows, which were even less likely to be commissioned.

For reference, the HETV banding is currently set as follows¹:

- Band 1: up to £1.25m per hour
- Band 2: £1.25m to £3m per hour
- Band 3: £3m to £8m per hour
- Band 4: Above £8m per hour

¹ Taken from the Pact/Bectu TV Drama Agreement 2023

Terrestrial broadcasters as well as US streamers were said to be putting more focus on band 2 shows, which potentially has real implications for workforce skills, highlighted later in this report (see 'A renewed emphasis on band 2 productions' p21).

Looking ahead to 2026

Looking ahead to next year and beyond, more interviewees were fairly buoyant about the prospects for production activity in 2026 than those who were less optimistic. Those working in production companies often highlighted the need to diversify their revenue streams or consider pivoting to different types of clients in order to maintain their commercial prosperity.

Changes in the perception of skills-related issues

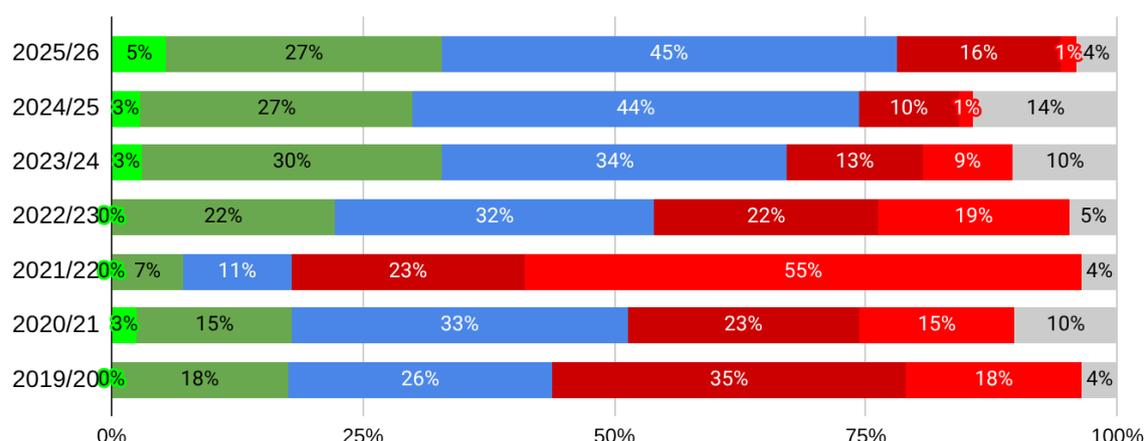
Before moving on to highlight the data and conversational themes around specific skills *shortages* and skills *gaps*, it is worth considering the overall perception of skills-related issues, relative to previous years' data.

Figure 3 below shows data for the perception of whether skills-related issues had improved or worsened over the last 13 months, tracked over the last seven years. Although the most common response remains that the skills issues have 'stayed the same' (45% in 2025/26) there has been an increase year-on-year in the proportion of participants suggesting things have 'got a little worse'.

Fig 3: 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

■ Got a lot better
 ■ Got a little better
 ■ Stayed the same
 ■ Got a little worse
 ■ Got a lot worse
 ■ Don't know



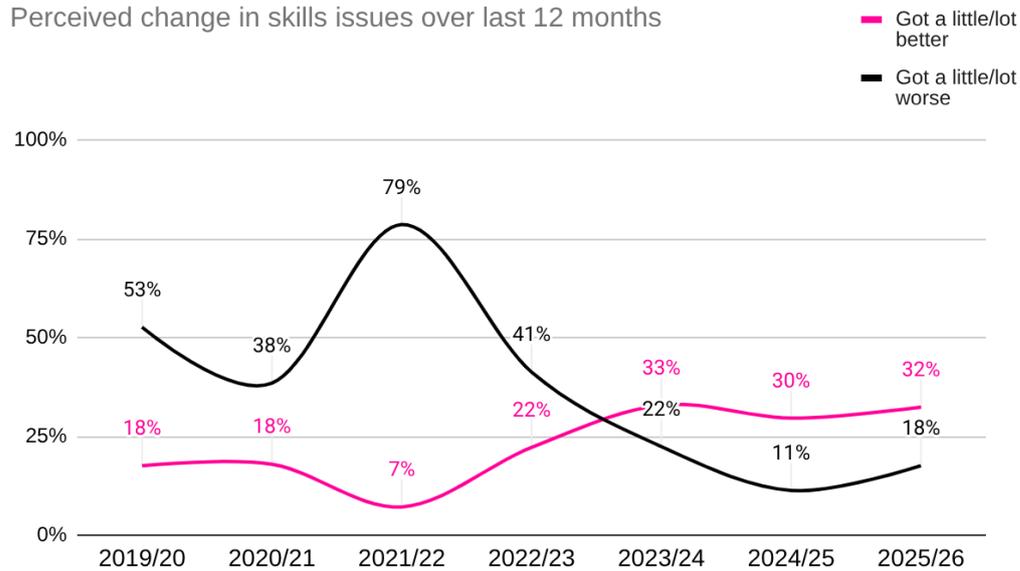
Base: HETV Industry/support participants (2025/26 n=74, 2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

Figure 4 below shows the percentage scores for 'got a little/lot better' versus 'got a little/lot worse' over the last 7 years. From a high point of 2021/22, where the skills issues were seen by 79% of research participants to have 'got a little/lot worse', there has been a steady halving of this score each year - down to just 11% in 2024/25.

In 2025/26, however, this score has begun to rise - albeit a small rise from 11% up to 18%. Although this is not a statistically significant increase, it may be an indicator of the direction of travel in the industry over the coming years.

Fig 4: 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 (2025/26 n=74, 2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

Specific skills-related issues

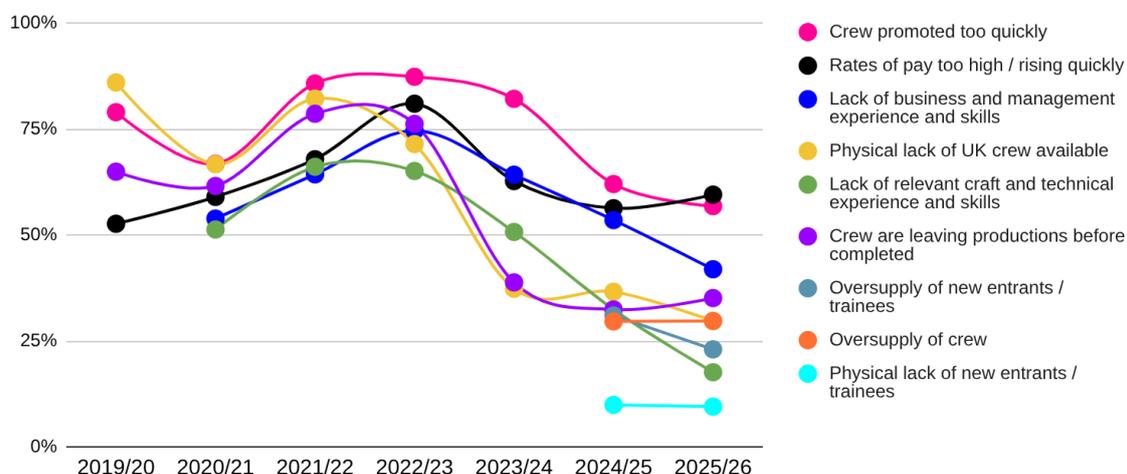
The HETV Skills Fund research has been tracking specific skills-related issues over time. As with the general trend above - an overall sense of improvement versus worsening of the perception of skills-related issues - the presence of these specific issues has been in decline since a high point around the time of the COVID-19 pandemic.

Figure 5 below shows the data by each specific skills issue over time. Adding data from 2025/26 shows a continued level of decline in a number of these issues. In particular:

- Lack of business and management experience and skills - down to 42%, from 54%
- Physical lack of UK crew available - down to 30%, from 37%
- Lack of relevant craft and technical experience and skills - down to 18%, from 32%
- Oversupply of new entrants / trainees - down to 23%, from 31%

Fig 5: In your experience, which of the following best describe any skills-related issue(s) currently being faced within HETV?

Perception of skills issues (prompted list)



Base: HETV Industry/support participants (2025/26 n=74, 2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

Skills shortages

Research participants in this study are asked to assess the severity of the skills *shortage* issue, defined as:

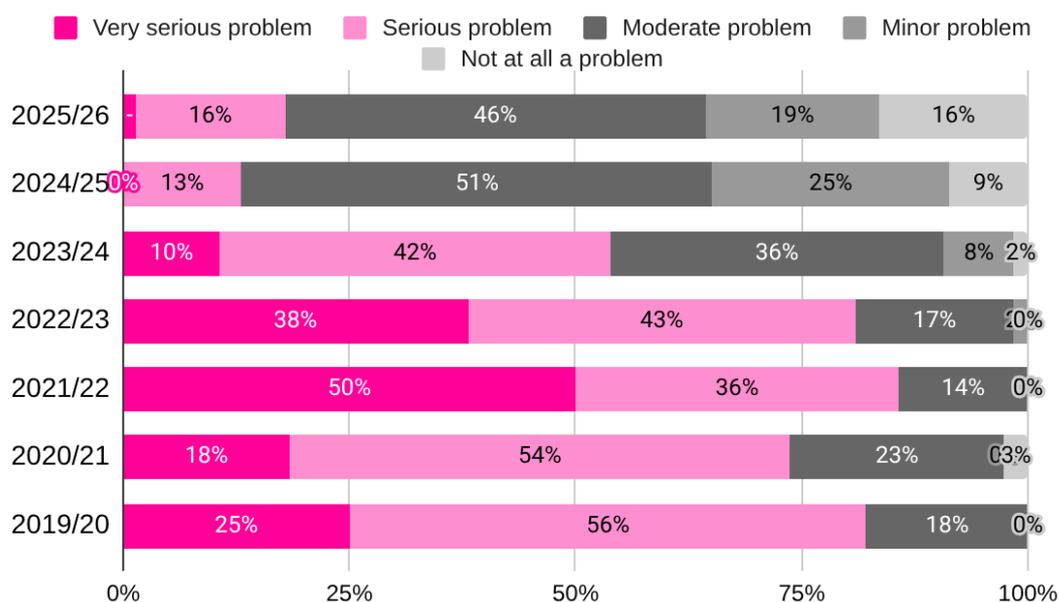
Skills shortage: a lack of people available to hire within certain grades.

In the previous year's research, the perceived severity of the skills shortage issue fell dramatically - from 52% of participants suggesting it was a 'serious problem' or a 'very serious problem' in 2023/24, to just 13% in 2024/25.

Figure 6 below shows that, whilst the perceived severity of the skills shortage issue remains low, it has increased marginally in 2025/26 up to 18% (serious/very serious score). This is, perhaps, another early indicator of a change coming to the HETV industry, albeit a very subtle one at present.

Fig 6: How would you assess the issue of a skills shortage within the UK HETV industry?

Perception of skills shortage issue



"Very serious" + "serious"

- 2025/26 = 18%
- 2024/25 = 13%
- 2023/24 = 52%
- 2022/23 = 81%
- 2021/22 = 86%
- 2020/21 = 72%
- 2019 = 81%

Base: HETV Industry/support participants (2025/26 n=74, 2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

Certainly this sustained reduction in the perceived severity of the skills shortage issue ties in well with conversations among interviewees. Many interviewees describe how they have not struggled in nearly the same way to find crew, compared to their experiences previously. .

"It feels like there's definitely a stronger breadth of crew out there currently to choose from" (head of production)

"There are more HoDs [who were previously] working band three who are now open and available for band two shows. And suddenly you can get better (more experienced, not better), HoDs for lower band levels that you would have done previously." (head of production)

Whilst crewing up is generally easier in the current climate, there are a number of subsequent issues that are uncovered through conversations with participants:

- An admission that being able to hire people you already know impacts negatively on a sense of fairness within the recruitment process. In turn, this means the recruitment process is less formal and less opportunity given to a wider pool of candidates
- That because a number of people have left the industry as a result of low demand, there are still shortages in some grades and departments

Specific skills shortages

In terms of the specific grades in short supply, table 1 below shows the shortage list for 2025/26 compared to other years.

% of survey participants who mention specific grade shortage	2025/26	2024/25	2023/24	2022/23	2021/22	2020/21	2019
Production accountant / payroll accountant	35%	27%	37%	60%	50%	67%	63%
Editor / 1st, 2nd assistant editor / assistant editor	22%	13%	31%	40%	18%	13%	24%
Production coordinator	22%	21%	22%	43%	36%	38%	42%
Script editor / supervisor / coordinator	16%	6%	6%	13%	12%	13%	12%
Line producer	14%	13%	34%	51%	39%	28%	40%
1st AD	12%	6%	16%	35%	30%	18%	30%
Location manager / supervising location manager	12%	20%	31%	44%	32%	51%	46%
Art director / supervising art director / standby art director / art dept	12%	11%	6%	25%	14%	9%	7%

Post production supervisor / producer	11%	6%	13%	24%	9%	-	-
Assistant production accountant	9%	3%	3%	14%	4%	5%	19%
Electrician / assistant electrician	9%	8%	4%	8%	5%	10%	11%
Production secretary / APOC	9%	13%	1%	10%	5%	8%	12%
VFX editor / supervisor / producer / animator	9%	11%	15%	17%	14%	-	-
Costume designer / supervisor / buyer / maker / non-specific	8%	10%	6%	21%	12%	3%	5%
Director / series director	8%	4%	7%	10%	2%	10%	7%
Grip / assistant grip	8%	8%	12%	27%	27%	10%	23%
Producer / exec producer	7%	6%	12%	29%	16%	18%	19%
Production manager / supervisor	7%	7%	24%	32%	23%	36%	18%
Financial controller	5%	7%	6%	13%	2%	10%	4%
Hair, make-up designer / artist / make-up team / dailies	5%	4%	3%	6%	7%	5%	-
Location coordinator / location scout / assistant LM	5%	3%	3%	6%	9%	3%	-
Best boy	4%	-	3%	-	2%	-	-
Carpenter / construction / construction manager / set decorator / painter	4%	7%	3%	6%	10%	6%	11%
DoP	4%	6%	4%	6%	2%	8%	4%
Gaffer	4%	4%	4%	8%	5%	3%	7%
Post production manager / coordinator / various	4%	7%	7%	-	9%	-	-
Props / model maker / buyer	4%	-	4%	5%	6%	3%	-
Rigger	4%	3%	1%	2%	4%	3%	5%
Access coordinator	4%	-	-	-	-	-	-
2nd AD / crowd 2nd AD / crowd supervisor	3%	10%	10%	13%	13%	3%	12%
3rd AD / non-specific AD	3%	4%	6%	3%	-	-	-
Archive researcher / producers	3%	6%	1%	-	-	-	-
Camera operator, assistant / focus puller / 1st assistant camera / DIT / non-specific	3%	7%	9%	12%	9%	5%	4%
Lighting various	3%	1%	4%	2%	4%	-	-
Production designer	3%	1%	7%	6%	7%	10%	-
Runner	3%	1%	1%	2%	-	-	-

Sound designer, editor (including assistant) / effects / recordist / foley editor / dialogue editor / music editor / sound team	3%	3%	12%	8%	12%	-	-
VFX production manager, coordinator, assistant, non-specific	3%	10%	10%	-	-	-	-

Looking at the specific shortages, once again for data in 2025/26, there is evidence of a subtle indication of a forthcoming change within the HETV industry with regard to skills-related issues. Notable shortages to have increased year-on-year are:

- Production accountant / payroll accountant
- Editor / 1st, 2nd assistant editor / assistant editor
- Script editor / supervisor / coordinator
- 1st AD
- Post production supervisor / producer
- Assistant production accountant

While some grades have seen a decline in their shortage year-on-year, including:

- Location manager / supervising location manager
- Production secretary / APOC
- 2nd AD / crowd 2nd AD / crowd supervisor
- Camera operator, assistant / focus puller / 1st assistant camera / DIT / non-specific
- VFX production manager, coordinator, assistant, non-specific

New grades to appear on the list in 2025/26, albeit in low numbers, are:

- Access coordinator
- Sustainability coordinator
- Prosthetics
- Producer director
- Health & safety
- Composer
- Director's assistant
- Series director
- Cast coordinator

Asked specifically about new roles emerging in the HETV industry, participants suggested the following:

- Generative AI artist / AI skills, advisor
- Sustainability manager / coordinator / runner
- Training manager / coordinator
- Virtual production manager / supervisor
- Supervising location manager
- Production supervisor
- Location coordinator

- Floor 2nd AD
- Base 3rd AD
- Assistant script supervisor
- Assistant / trainee DIT
- Wellbeing (various), People & culture manager
- Video playback operator
- Transport coordinator
- Supervising producer
- Junior producer

From conversations with interviewees, while many make the point that there is more of an abundance of crew available, it is clear that some shortages are felt more acutely. Examples discussed include editors for unscripted, where the length of time in the edit can be greatly extended compared to years past:

"We used to have to wait six to eight weeks to cut shows and now one of the [removed] series that is running, their edits are nearly six months long for one programme. So that's a bit bonkers" (director or production)

Another interviewee made the point that although available, it is still hard to find a 'good' accountant.

"When I say there's a shortage, I think there's a shortage of good ones [accountants] ... I feel like there's a lack of people, but I don't know if it's because there's a lack of good people" (production manager)

This raises the issue of skills *gaps* that exist in the HETV workforce and shows how the issue of skills shortages and skills gaps are inextricably linked.

Skills gaps

For the purpose of this research study, the skills *gap* issue has been defined to participants as:

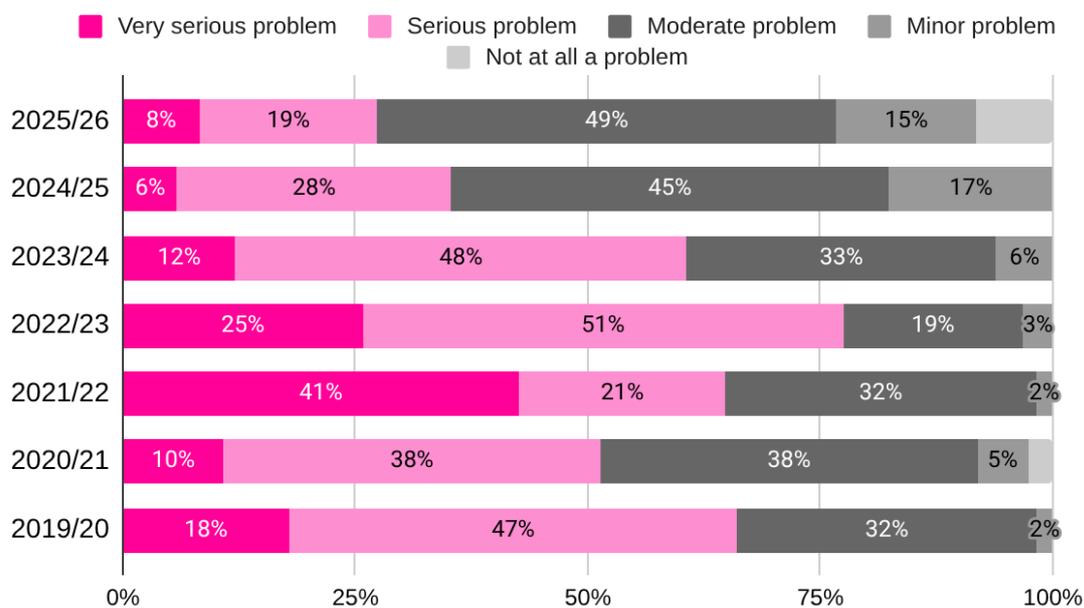
Skills gap: a lack of key skills within the crew who are available to hire.

As with skills shortages, perception of the severity of skills gaps as an issue has been tracked each year over time. Figure 7 below shows how the issue has been perceived on the same scale as the skills shortage issue; from a 'very serious problem' through to 'not at all a problem'.

2025/26 is a second year of a decline in the perceived severity of the skills gap issue - with 27% of participants having perceived it as a 'very serious' or 'serious' problem, compared to 34% for 2024/25 and 60% in 2023/24.

Fig 7: How would you assess the issue of a skills gap within the UK HETV industry?

Perception of skills gap issue



“Very serious” + “serious”

- 2025/26 = 27%
- 2024/25 = 34%
- 2023/24 = 60%
- 2022/23 = 76%
- 2021/22 = 63%
- 2020/21 = 49%
- 2019 = 65%

Base: HETV Industry/support participants (2025/26 n=74, 2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

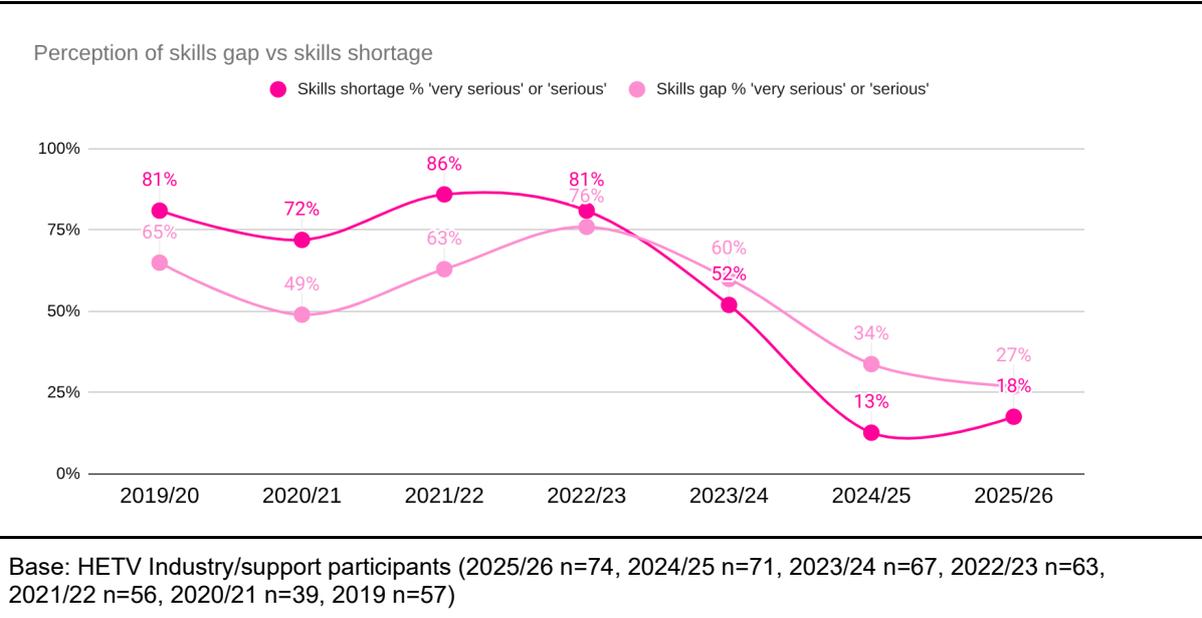
As the same scale is used to track the severity of the skills shortage and skills gap issue, a direct comparison can be made between them. Figure 8 below shows the percentage of participants who perceive each issue as ‘very serious’ or ‘serious’ over time.

Whilst the skills shortage issue historically outweighed the skills gap issue, 2025/26 is the third year in succession where the skills gap issue has eclipsed the skills shortage issue.

In reality, these two issues are part of the same overall problem - that productions need to find people but that the people they hire need to have strong skills and experience to be able to produce high quality high-end television. The interrelatedness of the two issues is obvious from conversations with interviewees.

“On a big show we could do with some people with 10 years of experience because it does matter, experience. And you can't train for experience” (production executive)

Fig 8: Seriousness of skills shortage and skills gap issues over time



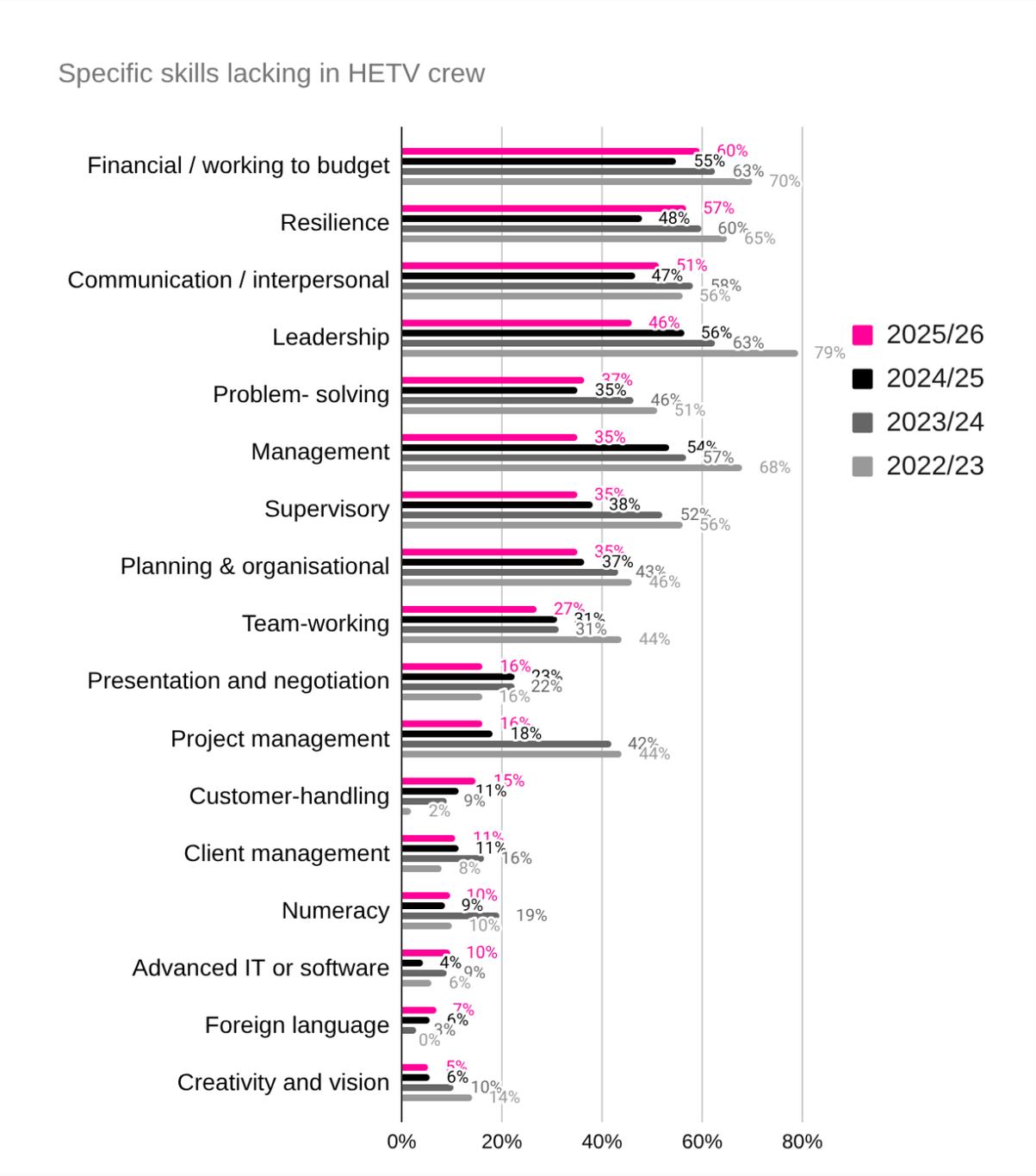
Specific skill gaps

The HETV Skills Fund research study also captures the perceived skills gaps at a very specific level. It has already been noted in this report that there has been a decline in the perceived lack of business and management experience and skills, and also a decline in the perceived lack of technical and craft experience and skills.

Figure 9 below shows how participants have viewed a lack of specific skills over time. Areas of skills which have seen an improvement (ie. are less 'lacking') in 2025/26 are:

- Leadership - down to 46%, from 56% a year ago
- Management - down to 35%, from 54%
- Team-working - down to 27%, from 31%
- Presentation and negotiation - down to 16%, from 23%

Fig 9: 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?



Base: HETV Industry/support participants (2025/26 n=74, 2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

A renewed emphasis on band 2 productions

As highlighted earlier in this report, there appears to be more of a focus on band 2 productions in 2025/26 - and potentially beyond - principally because band 3 and 4 productions appear to be those which are least likely to be commissioned and successfully financed in the current climate.

This has potential implications for the HETV Skills Fund because interviewees commonly talk about differences needed in the level of skills and experience to make a success of a band 2 production versus a band 3 or 4. Band 2 productions are said to require a more dynamic crew, who can problem solve quickly and work with a greater level of ingenuity to create a quality product from a smaller budget.

“Having more money and more resources comes with more pressure, but it does make a lot of things easier. You don't have to critically evaluate and problem solve quite in the same way as if you go, ‘We've got 50p, how are we going to make this 50p look like 500 quid?’

When I was starting out as a line producer, if we saw a scene that was set in Paris, we'd go ‘Right, where near here looks like Paris?’ And then during that post Covid boom, everyone would look at it and go, ‘Great, we're going to Paris for a day!’ ... It's just that mindset on how you do it has changed and now it's just trying to wind it back” (head of production)

This kind of experience can be contrasted with one interviewees description of working on a higher band 3 or 4 budget show.

“It was one of those jobs that, at the very beginning, I know I'm not going to please anyone here and I've just got to chart my course through it and get the job done ... Anyone can do it with a massive budget. And you do need to be able to be far more on your toes and dynamic when you're doing the lower bands” (line producer)

Some interviewees welcomed the return of this emphasis on band 2 - seen to be more inline with the way the UK HETV industry had founded its success as a more ingenious, ‘can-do’ type of workforce.

“The joy of a lot of telly is doing things really on very little money and being quite dynamic with it. And there's excitement there when you've got that ‘How are we gonna make this work? For this?’ ... You can actually have too much money to make a TV show ... I think people have been a little bit spoiled on band 3 and band 4. And having to sort of contort themselves back into a band 2 is challenging for them” (head of production)

“In my opinion, band 2 is the trickiest band to work within because most of the time you don't have a lot of money to spend and it's a real art form being a line producer in a band 2 show. I would say it's easier to scale up, it's not so easy to scale down” (head of production)

There would appear to be an opportunity for the HETV Skills Fund to direct investment and training initiatives towards helping the HETV workforce to adapt to working on band 2 productions, assuming that this size of budget production continues to become the norm for the UK.

The 'COVID cohort'

Another common theme to emerge from interviewees is the sense that there is a group within the HETV workforce who are more likely to be missing skills and experiences than others. They are often described as a cohort who came into the industry around the time of the COVID-19 pandemic and the boom in demand for HETV production that came soon after it.

This period of time in the industry was very much marked by crew either being stepped up (or stepping themselves up) too soon, before the requisite level of skills and experience had been accrued and developed. Other factors play into the fact that this period of time was less conducive to crew being able to learn fully on the job, such as:

- The physical limitations on productions enforced by the pandemic, which impacted on the amount of on the job learning that could be achieved
- The very fast pace of production work that characterised this boom period, where there was less time available for training and development of crew members
- The migration of freelance line producers to permanent roles as heads of production in production companies, leaving behind a vacuum

Interviewees commonly remarked on this group and the issues that still remain, years after the pandemic has subsided. This cohort, some perhaps now 5+ years into their careers, are taking on more senior positions and their relative lack of skills and experience present ongoing issues. They are said to lack resilience, require more 'hand-holding' from seniors to get the job done and might also need to have their work checked and verified. There is also evidence of them not having the best attitude towards working in the HETV industry.

"I think we've got a real shortage of actually strong ones [line producers] that you can just leave and go and control a budget very much. It just seems to be that, you know, the company seems to need to step in and have the, you know, the discussions quite a bit" (head of production)

"There does seem to be a wave of people that have come into this industry, you know, when it was really busy and there is a real sense of entitlement ... I mean half of the crew, I don't mean to sound blunt but they were useless. Half of them I would never employ ... their work ethic, coming in late, just not, I think not caring" (producer)

"To find a really good assistant producer in Natural History TV is quite tricky ...because so many people were assistant producers and they just got made up to producers so quickly that they haven't been assistant producers for long enough and now we just have this kind of lack of assistant producers there" (director of production)

"We had an instance on one of our productions where the financial controller (a film financial controller), had done some TV before, but not much. And then suddenly we're like, 'Hang on, let me just check this'. And you're sort of investigating his work in a way that you would never expect to do for a financial controller. ... and the problem comes to me too late" (head of production)

"What ends up happening a lot is that you maybe engage somebody to do a job and they're probably 80% experienced in the job rather than 100% experienced in a job and you have to bring in other people to fill in that knowledge gap" (producer)

HoDs management skills and budgeting skills

Another key area of skills gap identified by interviewees were among some HoDs who lack the necessary skills to manage teams and to manage their department budgets effectively. From conversations with interviewees - who are mainly from the production office lineage - there is a sense that certain HoDs are seemingly less willing to take on the responsibility that their role as a department head necessitates. This appears to apply to creative departments as well as technical, such as camera, and to younger Directors.

"But you wouldn't allow these people [certain HoDs] in any other industry and they wouldn't keep getting employed. And we do seem to just re-employing people who are not capable of doing the job" (line producer)

Issues with budgeting were associated with HoDs from creative departments as well as post production supervisors. Specific budgeting courses for specific types of crew or HoDs were mooted as a positive step forward.

"I'd say across the board - costume, makeup, production designers - them sticking to a budget seems to be very hard" (head of production)

"So when the post supervisor comes on board and they take over the post production budget, which can be £300,000 or whatever ... and they don't know how to budget and this happens all the time" (head of production)

On the other hand, a point raised by one interviewee was how difficult it can be to move into a new role and an associated lack the confidence or awareness of how to do the job. In a freelance workforce reliant on strong skills and experience to gain work and to get ahead, admitting to a lack of confidence is potentially a very difficult thing to do.

"But it can be quite daunting that I think we just move into these positions without any sort of training or brief ... you've got no guideline" (producer)

There is also the pressure of working on high budget shows - often under the watch of a US studio - and the risk of being exposed and how that might impact on future work opportunities in the industry. Noted by one interviewee was the stringent requirements from US studios.

"But if one thing is slightly off, they'll never do a [US Studio] show again. And I've seen that happen. On another show, someone I know to be excellent, they didn't have a good time. They'll never work for them again" (head of production)

Managing Gen-Z

Interviewees for this study have always come from positions of seniority within the industry and it may be that their perceptions of younger people might be tainted by a sense of *'it wasn't like that in my day'*. However, interviewees frequently mentioned the nature of younger crew members in the context of how different they are said to be towards their work..

Young people - commonly referred to as Gen-Z - were in many ways respected for being more able to assert themselves with regard to what they are willing to do and not do. However, they were also felt to lack certain sensibilities and even some basic etiquette with regard to conducting themselves and communication. The concern interviewees had was on the signals that their behaviour sends out in terms of their professionalism and being able to deliver high quality work.

"Younger crew have much stronger expectations and feel more empowered to speak about those than I certainly was when I was a runner" (head of production)

"The etiquette of how to write an email has dived in the past, probably even two years. People who don't know how to just write an email ... and it expands into WhatsApp groups. I don't think that manners or how you address someone should be lost. It's a workplace ... I'm astounded. I would never, as a runner, write emails to my superior that I get. I think for people to have some training of how to manage if you're feeling overwhelmed, how to respond in a concise way that's not rushed or inaccurate" (head of production)

Perhaps initiatives managed by the HETV Skills Fund on leadership and management training should be continued to address issues of managing early-career crew.

Skills in new tech

Given the fast-paced, changing nature of technology over recent years, interviewees have been asked about their experience of using new technologies and their attitude towards adopting them further.

Use of and attitudes toward generative AI

Generally, the common response to questions around the use of generative AI is that it is rarely being used by interviewees and the productions they are working on. There remains a sense of scepticism towards the technology and its effectiveness or accuracy, a lack of confidence in how to use it, an outright refusal to try it (perhaps driven by fear) and a lack of awareness of it at all.

The overall feeling is summed up well by this comment:

“There are some people who are really allergic to it and don't want anything to do with it because they're either keenly aligned with protecting the industry and labour disruption. I see a lot of people - young age and old age - who have that kind of knee jerk reaction against it. And then there are the other people who are like, 'Look, you know, I get it, I need to upskill. I need to learn a bit about even what the pros and cons are of it, what it can do or what it can't do'” (post production producer)

Some who are more open to technology are concerned over the way it might change an industry that is all about people and collaboration:

“I do like technology and I do like things that make things easier. I'm a little bit skeptical of some of the claims around this [generative AI] at the moment. And also it's the people, it's the collaboration, it's the things that go into it. It's relying on prompts, it's relying on previous work. How does that innovate other than it just starts, you know, chewing on the same stuff?

I still like the people. I don't want to work just with the computer generating, spitting out content. I like the collaboration that comes, the creative collaboration that comes from this industry.” (head of production)

A minority are much more open to embracing it and can see the potential for increasing productivity and efficiency. Use cases range from exploring its effectiveness at creating b-roll, through to improving the experience of a rough cut for a commissioning team by augmenting voices and shots. There is also a sense of being left behind by not fully embracing the technology.

“We're not using AI to produce our call sheets or do our budgets ... I think we're a bit behind” (head of production)

Others see an issue with copyright and litigation and there is some mixed messaging from studios, broadcasters and production companies in their policies on what can and cannot be used which might also be hampering adoption.

“And so it's just easier to go, 'We just won't use it' because then you know that you're not stuck in that kind of tussle between how long is it going to take these two parties to look over the terms and conditions and everything like that” (head of production)

Adoption of virtual production

From conversations with interviewees, there is little evidence of an increase in the adoption of virtual production methods in HETV, compared to conversations in 2024/25. This appears to be mainly a result of (perceived or real) high pricing, compounded by the context of a general squeezing of HETV budgets.

It is also suggested that to fully adopt the benefits of virtual production would require a substantial reconfiguring of the HETV production process - a need to put more time into prep and planning. A lack of band 3 and band 4 productions was also highlighted as hampering the use of this tech.

“So you have to think in a different way, and there's not a lot of people that really understand that ... I understand that it's all in the preparation. Telling your DoP and telling your cameras and your gaffer,

‘No - you all have to prepare for this all up front. Everything is preloaded’.

Your designer, even:

‘You're not building any of that. This is the world you're creating. You're only building this tiny bit of it in the foreground’

It's not necessarily everybody's cup of tea and I think people are sort of slightly reluctant in it” (head of production)

Feedback on the HETV Skills Fund

Positive feedback from interviewees

Praise for the HETV Skills Fund and the team which administers it is very forthcoming from the vast majority of interviewees.

“So I think ScreenSkills [HETV Skills Fund] are, and is, an amazing thing, an amazing thing that is available, that is there. It wasn't there when I started out. It's amazing the resources that are on there, the people that work there, the passion and dedication that people put into it to support people. I don't think all crew fully appreciate what's there and what's available to them and how good a resource that is” (head of production)

Overall, there is a sense from interviewees that there is appreciation for the flexibility and the willingness from the team to make things happen and to help ensure that productions get as much from the fund as they are able to.

“They are on the phone and explaining multiple times to warm up my line producers how they work and how we can utilise them” (head of production)

There is also recognition of the ‘journey’ that the HETV Skills Fund has been on over recent years and how its impact on the industry has increased and stands apart from other support organisations.

“It seems like they're just sort of exponential at the moment ... it feels like every year when I log in, ScreenSkills [HETV Skills Fund] are doing something else” (line producer)

“Sometimes organisations like that [screen organisations] could be seen as a bit annoying but they [HETV Skills Fund] don't give off that vibe. Everything with them is positive. It's really great that we've got them involved and we're doing this and I love them” (producer)

“I like seeing progression in our teams. So having screen skills there kind of facilitate some of those things is brilliant” (head of production)

“There are lots and lots of success stories with ScreenSkills [HETV Skills Fund], so I think they do amazing work” (producer)

For those who had personally experienced being part of a Skills Fund training programme, the impact it had on their confidence and career was clear - one example coming from a line producer who had recently stepped up:

“I did the ScreenSkills [HETV Skills Fund] line producing course, which was great because it gave me the confidence that when the call came in, I went ‘Yeah, I reckon I can do that’” (line producer).

There was mention and appreciation of the following:

- The E-learning resources available on the ScreenSkills website - seen to be good as a source of refresher for senior execs as well as a learning tool for more junior crew
- The HETV Skills Fund team were praised for ensuring productions could get the maximum they could out of the fund
- ScreenSkills generally was seen as a great online resource, often something participants would point people towards if they were interested in a career in TV. A suggestion that ScreenSkills was the ‘front door’ to the industry
- The transformative nature of the Make a Move scheme and how it engages and motivates by bringing clarity, goals and accountability to a freelance workforce more typically without this type of structure
- Praise for the ‘training passport’ scheme, allowing hirers and crew to avoid duplication of mandatory training at the start of each production. Some interviewees, unaware of this scheme, suggested something very similar for the HETV Skills Fund to potentially roll out
- Showing willingness and flexibility towards those on PAYE fixed-term contracts to be allowed to take part in the HETV Skills Fund initiatives
- Proactively reaching out and conducting research with industry:

“I would say these things [research interviews] are very useful every year because it doesn't often feel that we get the opportunity to feel our feedback is being heard ... they're asking the questions, listening. So that's good" (line producer)

Priorities for the Industry

Also as part of the online survey, participants are asked each year to rank their priorities for the HETV Skills Fund, from a range of different areas:

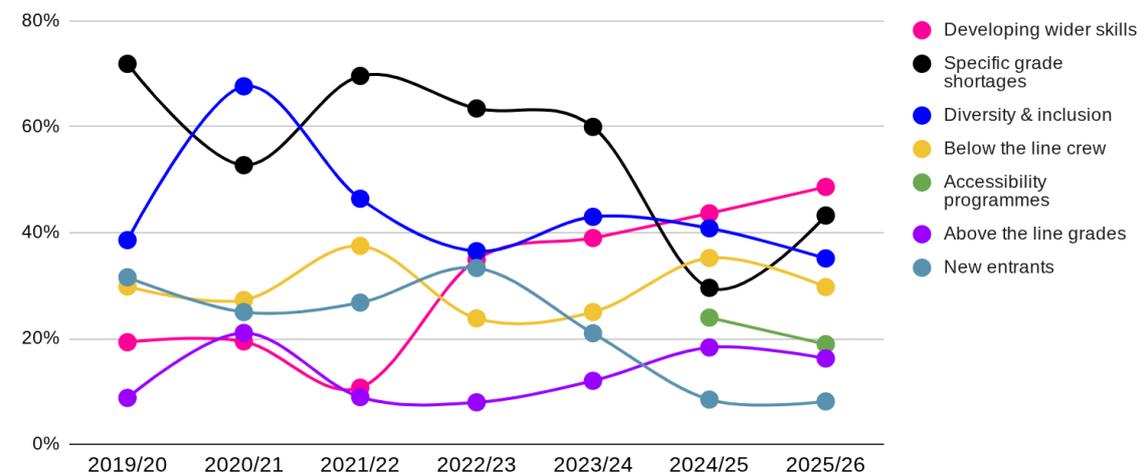
- New entrants - bringing more people into the industry at the bottom level
- Diversity and inclusion - programmes to bring more diverse crew into the industry at all levels
- Developing established below the line crew in helping them to move their careers forward
- Tackling specific grades shortages eg Production Accountants, Location Managers
- Developing wider skills - eg Leadership and Management training and budgeting for department leads
- Initiatives for those in above the line grades eg Producers and Directors
- Accessibility - programmes to help improve access for those with disability including hidden impairments

Figure 10 below presents this data over time as the percentage of participants who ranked each priority as first or second. Having been the stand-out priority across the post-covid boom period, *tackling specific grades shortages* increased sharply in priority in 2025/26, having dipped to 4th place a year earlier. This ties in with the perception of a slightly increased level of severity for the skills shortage issue in 2025/26. Also increasing year-on-year and maintaining the top priority spot for a second year in succession was *developing wider skills*.

All other potential priorities saw a decrease year-on-year - not unimportant but less of a priority versus wider skills and grade shortages. Diversity and inclusion was the third highest priority. Feelings around this subject in 2025/26 were that progress was still being made, but that it was slow and that reduced budgets might make it harder to invest in diversity.

Fig 10: 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 (2025/26 n=74, 2024/25 n=71, 2023/24 n=67, 2022/23 n=63, 2021/22 n=56, 2020/21 n=39, 2019 n=57)

Participants were also invited to give their top three priorities as open text comments in the survey. This data has been visualised as a word cloud below (figure 11).

A need to ensure core skills to do the work are embedded across the crew base. There was a suggestion here of a reliance on other crew members to cover the details, understand the process as well as foresee potential issues before they happen.

Mentoring

A suggestion to increase the number of mentors by encouraging more crew to volunteer as mentors as a way to develop crew and HoDs, supporting their learning journey.

Job share

More support for job-sharing schemes - especially to help working parents continue in the industry rather than leave never to return.

Support for mid level crew

Specific support for mid-level crew who may display skills gaps due to a lack of full experience across COVID and subsequent very busy periods in the industry.

Technical understanding of workflow and content production

A suggestion for crew and tech services to improve their understanding of workflows in content production in order to maintain the high quality and value for money of UK crew to global producers and buyers.

