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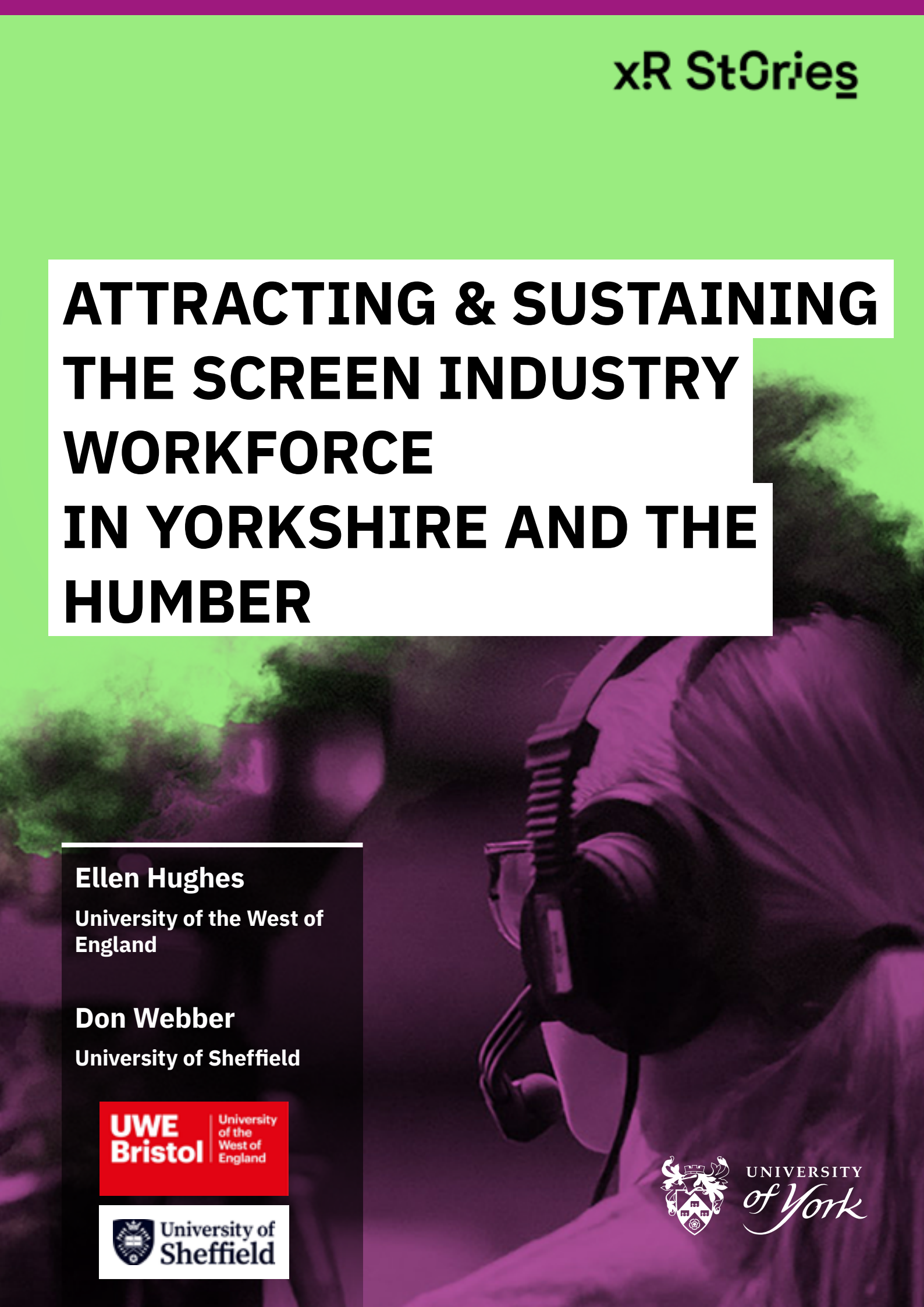
ATTRACTING & SUSTAINING THE SCREEN INDUSTRY WORKFORCE IN YORKSHIRE AND THE HUMBER



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About XR Stories

XR Stories supports research and development for companies working in cutting-edge digital technologies in the Yorkshire and Humber region. We do this through a programme of funding, research collaboration and connection. We work across film, TV, games, media arts, heritage, advertising and technology to champion a new future in storytelling.

XR Stories is putting the innovative and dynamic digital storytelling community of our region at the front of the global creative and cultural landscape. We draw together the University of York's research excellence and a strong business focus. We are finding new ways to tell new stories to new audiences.

XR Stories is a £15M investment by AHRC, ERDF, the University of York, the British Film Institute and Screen Yorkshire.

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EXECUTIVE SUMMARY

A key resource to any creative industry is their workforce, and this is particularly true for the screen industry. Although the central importance of this workforce is widely acknowledged, comparatively little is known about the mobility and embeddedness of these workers in and across firms and in and across regions. This is of crucial importance to investors too, because it is the screen workers who ensure that returns to investments in screen industry capital equipment are realised, and it is their imagination and dexterity in creating captivating TV or film programmes that lead to the exports of visual representations of our cultural heritage, which in turn earns revenues for our economy and enables it to grow.

This research sought to increase understanding of the mobility and embeddedness of screen workers in the Yorkshire and Humberside region of England, grounded on the recognition that the industry in this region has very strong links with other screen organisations across the North of England, into the South of England and including London, and further afield internationally.

Our methodological approach was to focus on the screen workers themselves and, through the application of a semi-structured interview schedule, we collated information about the historical paths of screen workers through their childhoods, into post-compulsory education, their challenges in entering the industry, their training needs in the industry, their reasons for job and location changes, their understanding of the historical path of the industry and how it led to its current state, concerns about current and future changes in the industry, and their understandings about what can be done to strengthen the industry in aggregate and specifically across the Yorkshire and Humberside region. We split the sample between early, mid, and mature career screen workers to ensure a breadth of perspectives, and the interviews lasted for an hour on average, enabling us to also capture a depth of information.

Our interviewees provided a strong emphasis that the position of the screen industry at the moment reflects its evolution at least as far back as the 1980s and the Broadcasting Act of 1990, which set the ground for the deregulation of British television. This selloff of independent TV and radio services, often though not always at excessively high prices, and the instigation of a new regulatory framework had a considerable impact on the sustainability of regional entities and ultimately led to mergers and acquisitions. Concentration of the industry occurred with strong effects on the distribution of commissioner expenditures, and this led to strengthening of the industry in the London region which drew in skilled workers and led through cumulative causation to a very strong London screen industry.

But many highly skilled screen workers do not want to work in and around the London region. Creative workers want to make a contribution to a variety of types of programme and particularly on topics that they are most passionate about, and many of the screen workers in our sample emphasised a strong sense of connection to communities and family in the Y&H region. Creative workers have roots for various reasons in particular geographical areas,

and our research corroborates the view that creative workers often return to locations which have strong meanings for them. Our interviewees treasure aspects of living in the North, including the satisfaction gained from their appreciation of the rural landscapes, the welcoming and open attitudes of people in the region, and the size of urban areas. All of the early career workers in our sample of interviewees studied film, TV, and/or journalism degrees in the region (mainly in Leeds or York), which indicates a strong and actioned desire to live and work in the area, but also to remain in the area for a long time. They recognise and appreciate that the region is a great place to live, with affordable houses, and with strong family connections, and strong communities.

Moreover, many consumers of TV and film value the natural physical beauty of landscapes in the Yorkshire and Humberside region, that look amazing on television, and these consumers are also very positive towards the accents and to the character of people who reside in those locations. These two factors - the regional, national, and international demand for the TV and film programmes produced in the region, and the talented and passionate creative screen workers who, like most other creative workers, have a sense of belonging to an area - together have resulted in the high level of success of the screen industry in the region. The coopetition between screen companies in the wider region, including Manchester and Liverpool, strengthens and ensures a degree of sustainability of the industry in Yorkshire and Humberside.

We document the interviewees' knowledge of screen workers elsewhere, such as in London, who have a strong desire to return to the Yorkshire and Humberside region but do not do so because of concerns relating to the status of their job and whether similar status regular and long-contract jobs are available in the North. The pandemic increased the ability to contribute virtually to a screen industry company, which is making people realise that they do not have to reside in Yorkshire to be able to work for a Yorkshire-based company, and similarly screen workers do not have to pay the very high costs of living in London and the Southeast, especially if their connections to Los Angeles and other locations internationally are becoming increasingly important. A key issue here is that the length of employment contracts and level of pay in Yorkshire and Humberside and across the North more generally, are not long enough to convince screen workers passionate about the region to return and contribute to enhancing the dynamism of the industry in the region.

Low wages and short contracts are also discouraging entry into the industry by recent and appropriate university graduates, especially for those potential workers with working class backgrounds and/or without parents who are able to provide strong financial support during the first few years of a screen worker's career. Low wages and short-term contracts make it impossible to sign up to a longer-term home rental agreement and to contemporaneously sustain a decent standard of living, which then make appropriately skilled workers turn their back on the industry and work in another industry that pays higher wages and/or offers longer term contracts. These short-term contracts are typically a reflection of commissioners' lack of vision of the need to instigate longer running TV series.

Longer running TV series would enable more money to be spent on training on the job, which is vital in this sector because it is experience that strengthens abilities and then reputations. The current situation, with a high proportion of freelancers, passes the training costs onto the freelancers, which are then often under trained. The commissioning of longer series would enable more training of the resident workforce and provide them with greater stability, which would augment their expertise and capacity to continue to provide world-class TV and films, not only for the regional and national audiences but also to gain revenues from international exports, in the future.

1. INTRODUCTION

This research augments knowledge about the screen industry by enhancing understanding of how to attract more and retain current screen industry workers in the Yorkshire and Humberside region (Y&H).

This is important from the Business Development Intelligence perspective because:

- skilled workers and their knowledge are the backbone of this sector, and yet their spatial mobility and embeddedness in the region are unclear;
- investments in capital equipment tend to be complementary to the knowledge and skills of workers working in the industry, and yet these workers' potential spatial mobility puts these returns on investments at risk; and
- a lack of understanding about how firms interact with each other and with policy makers cloud understanding about the current and potential future of the screen industry in the region. Improved understanding of how resource owners and capabilities come together to produce an output could inform policy to strengthen the industry in the region.

Our research focuses on workers in TV and film and investigates workers' migration, education, and professional paths into the region and into the industry. By taking a biographical approach, this research provides a deep understanding of factors that have shaped screen workers' professional trajectories and underscores their motivations, experiences, needs, networks, and future plans at three different professional life stages: early career, mid-career, and mature career.

The findings embedded herewith develop knowledge in six important ways. First, we emphasise that the evolution of the screen industry in the UK since the 1980s has significantly shaped the position that we find ourselves in today. Gone is the golden age of regionalism in the screen industry, but geography remains a key characteristic of the competition, cooperation, and coopetition that we find exists in the current screen industry landscape. Second, this industry is currently progressing through a sizable shift in the way screen services are consumed and produced, and we emphasise that there are, most probably, even greater shifts in the screen industry on their way. These two factors represent industrial evolution that is partly socially formed and partly technologically driven. Third, we reveal in-depth knowledge of the reasons why early career screen workers entered and why early and mid-career screen workers remain in the industry. Fourth, we explore the reasons why workers are exiting the industry, both when they are approaching retirement and when they are early and mid-career. These two factors reflect the importance of the screen industry's workforce in the region, the personal and professional reasons behind these labour market dynamics, and the ongoing human capital gains and losses for organisations operating in the industry. Fifth, we document the importance of social and professional networks for existing screen workers and detail how these were significantly modified by the COVID-19 pandemic. Sixth, we emphasise the skills gap in the industry, the importance of skill switching, and the training needs of early and mid-career workers. In the final section we draw inferences and make policy recommendations.

2. METHODOLOGY

We sought to understand the reasons why screen workers locate into the Y&H region, and we adopted the stance that the best source of this information is to ask screen workers for this information. This report therefore draws on semi-structured interviews with individuals working in the screen industries. This research received ethical approval from The University of Sheffield under their Ethics Committee reference number 045451.

Knowledge and experience of the screen industry evolves over a screen worker's lifetime. Such workers will confront different challenges depending on the length of time they have worked in the industry, and thus we sought to source knowledge from workers at different career stages, from new recruits to mid-career workers to individuals nearing their retirement and/or exit from this workforce. Taking this approach resulted in the creation of a database of information that reveals key challenges across the screen worker sector and across the seniority and experience continuums. Career stages were categorised based on the number of years interviewees had worked in the industry (rather than their age). Those who had worked for ten years or less were classified as early career workers, twenty years or less as mid-career workers, and those with over twenty years experienced were classified as mature career workers.

Initially we drew on the contacts and networks from within XR Stories and SIGN, the funders of this research, to identify and provide contacts of screen workers that might be interested in being interviewed. A range of initiatives were adopted to expand this pool of contacts, which included contacting screen worker companies directly and scouring LinkedIn for potential interviewees. After the completion of each individual interview, we asked the interviewee to recommend some of their contacts in the industry for interviews. This snowball sampling approach is common in gathering interviewees in populations that are hidden or difficult to access for researchers.

The initial sample of contacts was provided by XR Stories and SIGN, and a diverse cross section of screen industry workers were sought at different levels of seniority and experience. The authors of this report have no reason to conclude that this is not the case, and this is corroborated by a range of issues that were discussed in the interviews. Nevertheless, a potential limitation of the snowball sampling approach is that the probability of agreeing to being interviewed may have been non-random. Similarly, when we asked those interviewees to recommend contacts for further interviews, it can be the case that interviewees are more likely to recommend their close contacts, and this could reinforce the strength of a perspective rather than increase the heterogeneity of issues discussed. Again, the focus and breadth of issues covered by the interviewees at various stages of their career suggest to us that this community bias was not strong.

A significant strength of this research is that the researchers are not part of the screen industry. This separation, together with the assured anonymity, may have reduced any potential suspicion or mistrust in the researchers that could have been enhanced the likelihood that interviewees withheld or promoted key information, or led to any interviewer bias. Sufficient rapport was

attained that lead the researchers to believe that interviewer bias is not significant, and the approachability of the interviewer may have even strengthened the validity of the snowball approach and the recruitment of interviewees which was important to enable the documentation of accounts of screen workers' lives.

During this process we encountered challenges in recruiting interviewees. This may be due to screen workers' time constraints, especially as the time duration for the compilation of this report coincided with the ramping up of productions after the lull caused by the COVID-19 pandemic lockdowns. Our industry contacts suggested screen workers may also be experiencing research fatigue (Clarke, 2008), as the industry has been the subject of a significant number of research reports recently. We found freelancers to be particularly hard to contact and recruit. For reasons relating to GDPR, interviewees were unable to share contact details of freelancers they knew, limiting the efficacy of the snowballing technique. Freelancers were difficult to identify using online searches, inhibiting our ability to make direct contact. As a result, the employment experience and career trajectory of freelance workers are largely under-represented in this data. However, interviewees did discuss the experiences of freelancers known to them, and compared this with their own experiences, leading to insights into the issues faced by freelance screen workers.

We developed a semi-structured interview schedule that focused on asking questions relating to screen workers' migration and career trajectories. We asked about their routes into the region, their reasons for staying, and any potential future moves away from the area. We also asked about their motivations for working in the screen industry, their education paths, and their career progression. To understand screen workers' professional networks, questions were asked about their local, national, and international connections. Additional questions were asked to interviewees who were in the mid and mature stages of a screen worker's career. Mid-career workers were asked about skills gaps and skills training requirements, which is particularly pertinent during the industry's shift to new patterns of working and the constant updating and adoption of new technologies. To understand any potential implications for the industry of the loss of highly experienced screen workers towards the end of their career, many of whom were senior figures in the region's independent production companies, mature career workers were asked about their retirement and succession plans.

We asked about their routes into the region, their reasons for staying, and any potential future moves away from the area.

This report summarises and interprets the information that we received from interviewees through the semi-structured methodological approach and specifically draws on in-depth interviews with 18 screen workers, of which 9 were mature career screen workers, 5 were mid-career, and 4 were early career. Two follow-up interviews were also completed due to the interviewees' desires to continue to talk through further content that they saw as important contextual or further information that would be useful in interpreting our data and providing a more rounded understanding of the issues experienced by workers in the screen industry. Interviews lasted around 60 minutes on average, and they were recorded, transcribed, anonymised, and then coded to extract themes.

3. RESULTS

This section collates the understandings and breadth of views of the evolutionary development of the screen industries in Y&H and the effects this development has had on attracting and sustaining the screen industry workforce in the region. It also brings into focus those contextual issues that are important either for the screen worker industry and/or the individual screen workers.

There was an extensive list of issues that our interviewees perceived affected the development of the industry, and these issues were seen to have affected the recent past and current position of the industry and are expected to affect the future trajectory of the industry and of the career opportunities and successes of screen industry workers. Six key themes emerged, namely:

1. History matters: screen industry evolution in the UK since the 1980s,
2. Changing consumption patterns leading to changing production patterns,
3. Early career workers and their retention in the region,
4. Workers exiting the industry,
5. Social and professional networks,
6. Skills gaps, skill switching, and training needs.

Collectively these offer a powerful narrative explaining why many highly skilled and engaged screen workers are experiencing difficulty obtaining or retaining secure work in the industry in the region. These themes highlight the issues that prevent them from engaging in more screen work and reduce their ability to share their passions for the region with viewers from within and outside of the region. These themes also collectively explain why current concerns regarding the under-achievement of the industry in the region are so vocal, why it has been and continues to be difficult to attract and retain screen workers in the region, why the spatial mobility of screen workers risks lowering the returns on local levels of screen industry investments, and underscores that the undervaluing of characteristics and advantages of screen industry contributions in the region are a significant cost to the breadth and diversity of the knowledge and entertainments offered by screen industries in the region to regional, national, and international audiences.

3.1. History matters: screen industry evolution in the UK since the 1980s

Our interviewees emphasised that the changes that are occurring within the screen industry at the moment can be traced in part to the changes that occurred in the 1980s. This section reviews screen workers' perceptions of the importance of history and path dependence in shaping the industry and turning it into the screen industry that we have today.

Evidence provided by interviewees highlights that screen industry changes occurring from the 1980s onwards have

significantly influenced the evolution of the industry ever since. Many of our interviewees know first-hand of the effects of the Broadcasting Act 1990 on the industry and in the region having lived and worked in the industry and in the region for decades. They see the late 1980s and early 1990s as a golden age of television in the region and in the North generally, when TV programmes were commissioned by people who lived in Leeds, Manchester, and Newcastle, through regional ITV companies including Yorkshire TV [YTV], Granada, Tyne Tees, as well as the BBC.

3.1.1 The golden age

Regional funds were spent on national and regional television needs and on the production of a range of programmes. This led to strong networking of screen workers and a vibrant and progressive industry:

Back then Yorkshire TV was very well funded, and it was part of what was then a networked television centre. So, alongside where we were as the newsroom, there were network documentaries, network education, network science. There was The Darling Buds of May, there was drama being made, David Jason in the canteen, and it was like you were in London

(company director, mature career)

Vibrancy of the industry led to spending on the skilling up of the region's screen workforce, which was often led by the larger regional organisations including ITV and the BBC. The accumulation of relevant skills and experience enabled workers to climb the career ladder, and this opened doors for the next generation of screen workers.

Entry into the industry were through diverse access points, including local newspapers and radio stations, particularly for people from working class backgrounds. Others entered the industry slightly higher up in the career ladder having studied for a journalism or media related qualification at a regional university before joining a broadcaster. Working for larger organisations often had particular advantages, such as being able to gain experience of working on a wide range of programme types, and across many roles:

[I did] two years of newspapers, then into local television, and the great thing about television back then was that regional companies like Tyne Tees and Granada and Yorkshire, they were like mini broadcasters. Tyne Tees back then, they did every type of show. They did Saturday morning kids shows with Ant and Dec … they did [national] quiz shows … they did politics shows, they did documentaries, you could work in the newsroom, the sports department. So, I basically went through every department trying to work out what I liked doing and what I was good at

(mature career, creative director)

The diverse range of training experiences on offer in the 1980s added to job satisfaction, enhanced the buzz of the industry, and led to a highly engaged and dedicated workforce, with many screen workers passionate about their region and the offerings that their part of the national ITV network could offer regionally, nationally, and internationally.

This passion was also due to their strong connections to the region. Over half the mature career workers in our sample were born and raised in the region and worked there for the majority of their careers. They commented on the importance of their connections with local people and their ability to tell local stories, as demonstrated in this account of hosting a local radio show:

I could identify with the audience, and I had a really good audience because even on the overnight shows … I would talk about things that people [were interested in], which were mainly working people at night … I'd got all the taxi drivers tuning in. I'd got all the nightshift workers tuning in, all the milkmen

(mature career, company director)

Although local connections between screen workers and their audience were very strong,

living and working within the region did not necessarily mean a lack of travel within the UK or internationally. Interviewees described being sent to locations nationally for training courses (often lasting months) during which they formed resilient connections with colleagues from across the screen industry, which created relationships and networks that lasted throughout their careers. They also described regularly travelling abroad to work on international projects:

And even working in regional television in the early '90s, I still went all over the world making regional documentaries about ... people who are travelling to South Africa or prisoners of war going back to Japan, in regional television

(mature career, creative director)

The 1980s were evidently remembered by our now mature career interviewees as a thriving and flourishing time for the screen industry. The breadth and depth of offerings were presented to local, regional, national, and international audiences who connected with the stories told and found great interest in both the familiar and unfamiliar. The golden age of television in the UK, and regional television in particular, provided screen workers with many opportunities to hone and diversify their skills, partly because the demand for television programmes continued to grow and reach record viewing figures and partly because the range of children's programmes, regional news, dramas, politics shows, etc., was expanding apace.

3.1.2 Deregulation and reconfiguration

The strong regional identities of the regional television providers and the blossoming range of programmes that appealed to regional, national, and international viewers, offered a ripe opportunity for the Thatcher Government to gain revenues from the privatisation of the regional television providers. The Broadcasting Act 1990 set the ground for the deregulation of the British television. Subsequent merger and acquisitions have led to the concentration of regional televisions into one main English ITV channel which we see today.

The interviewees expressed strong regret that regional opportunities are not available anymore, and the reasons for this demise in training opportunities and experiences were connected to the Broadcasting Act 1990 that changed the nature of the screen industries, with merges occurring to reduce administrative costs and reduce duplication, but also to gain greater scale of production. This became increasingly important as regional ITV franchises were awarded to the highest bidder. The high levels of competition for Yorkshire Television ended up with the incumbent paying £37.7m in annual payments to HM Treasury (Wittstock, 1991). It is inevitable that this would have been a drain on resources that could have been invested in staff training and infrastructure development, especially when Yorkshire Television was paying much greater annual amounts to the HM Treasury than some of its competitors, such as the £2,000 annual amount Central Television paid to HM Treasury.

When de-regulation and consolidation of the ITV regional franchises occurred in the 1990s to further reduce costs and gain scale economies, regional production hubs began to disappear, and greater centralisation led to the concentration of highly talented screen workers in the London region where demand for screen workers was high and with frequent career progression opportunities. In 1992 Yorkshire TV and Tyne Tees merged, who were then taken over by Granada TV in 1997.

In London, Thames (Carlton) and London Weekend Television continued to grow because of their high local viewing figures and the strong potential return on advertising. This revenue was channelled into programmes that had strong and growing national appeal, such as The Bill and Minder. The London and Southeast region's screen industry continued to grow

rapidly, not least because of the presence of television commissioners, and this growth attracted screen workers to the London region which led to an increase in the concentration of decision making in the capital:

Jimmy's, which was the first fly on the wall medical series set in St James' Hospital in Leeds, a ground-breaking medical show from the late '80s, was commissioned by Yorkshire Television internally and then broadcast nationally and became a really famous network show. Granada, obviously, over the decades commissioned their own shows out of Manchester that would play on the network. All of that power went, in the '90s probably, so that all the ... decision making went to London

(mature career, company director)

And this concentration of decision making in London led to the demise of the screen industries in the regions:

So, the very existence of Yorkshire Television was completely ... it disappeared. You know, the reason for their existence was guaranteed slots, guaranteed hours, and hours of network slots in science and documentary. Overnight really, that was deregulated. So, there was no guaranteed income for Yorkshire Television anymore, so all those departments were disbanded, all those network departments

(mature career, company director)

However, not all talent moved to London at this time. Two key reasons transpired from our interviews as crucial for not relocating to London. First, a number of former ITV staff remained in the regions to start up their own independent production companies. Part of the reason for this is that the outgoing Yorkshire TV made thousands of pounds available and sometimes also office space for a few entrepreneurs who wanted to start their own independent production companies. This was the upside of deregulation and brought about the birth of some independent sector organisations. For those who had moved to the Y&H region from elsewhere in the UK, grants were a significant reason for not relocating to London. Second, those who were from the Y&H region wanted to stay in the region either to be close to family members and/or because they had held a strong a commitment to the region and its communities:

I think there's part of that not leaving them [Parents] and totally severing my roots, because I think I put a lot of what I bring to the industry down to where I grew up and the group I grew up with, and the kind of faith that people had in each other and that helping each other out on a council estate. I think [this] can be reflected in outputs, whether it's something you say on the air as a relatable link or whether it's a documentary or a scene in the Yorkshire Met that is just resonance of community. I sound really holier than ... but I'm not. It's just I didn't want to move

(mature career, company director)

But at the same time, support and funding from London was seen to be misdirected and not representing the needs and interests of screen workers in the regions, and this created a backlash:

ITV was contracting that out of London, and ... we were only doing things that had the words 'From Hell' at the end of them ... so we said we don't want to do this anymore, and we set a company up with the quite specific aim of trying to stay in Leeds

(mature career, company director)

I haven't really gone very far in terms of geographically for where I live, and I live in Sheffield. And I'm very very passionate about the North and about the regions of the UK and their importance to ... to everything really. And particularly for the creative sector, not being a London centric driven ambition

(mature career, company director)

So structural and ownership changes in the industry resulted in a concentration in funding and in funding streams that favoured a concentration of the industry into London, but socioeconomic factors created inertia that ensured that not all screen workers relocated to the capital. Regional identity and community values were particularly important for some screen workers who remained in the Y&H region, and for many of those who remain passionate about the cultural wealth and value of the region.

3.1.3 Regions matter

Regional identity matters strongly to regional screen workers as well as to individuals residing in the regions and consuming regional television programmes. The new indies were described by an interviewee as being different to production companies in London: they were 'Northern' in attitude and had an ability to tell different stories relating to the lives and experiences of people in the north:

... most of our work is being good at telling real life stories about people that are out there doing things ... and packaging them in a way that gives great value to the broadcaster and that the viewers like ... So, we connected to ... a story about a man who'd made up a lottery win in Doncaster, connected to a chef who'd been a royal chef, but he came from somewhere in North Yorkshire. We connected to things that we were picking up from around in the world and ... that's how we built any sort of momentum

(mature career, company director)

While new indie production companies began to fill the void left behind by the consolidation of ITV regional franchises, the training and career opportunities that the old ITV structure provided were more difficult to replace. Job security did not return and paths into the industry and up the career ladder were much more obscure, particularly for people from working class backgrounds and for those with limited familial financial backing. One interviewee commented that the demise of the old ITV structure:

... took away training, it took away entry points for the ... people in the working-class background, because they couldn't ... literally couldn't move to another city ... and it sort of sucked a lot of that stuff out [of the industry and the region]

(mature career, company director)

Regional identity matters strongly to regional screen workers as well as to individuals residing in the regions and consuming regional television programmes.

The government responded to the lack of training opportunities with regional and national funding grants for training schemes, which were successful, but came to an end in the early 2000s. Skills training continues to be provided, particularly by the industry-led body ScreenSkills, but funding remains limited, and this is having an effect on particular groups within society that may otherwise have entered or remained in the industry. This lack of training opportunities and support is closing doors for some screen workers and may be adversely affecting the competitiveness of screen industry organisations, including those that could otherwise have contributed to exports and wealth creation in the region and across the UK more generally[1].

3.1.4 Industrial roller-coaster

The Government responded to the London-centric nature of the industry by introducing

1. See Jones, Brereton and Swords (2022) for more on the current skills and training provision in the UK film and television sector.

minimum quotas for regional production. Our interviewees gave us the impression that they thought the screen industry in the Y&H region was currently on an upward trajectory. They attribute this upturn not only due to the introduction of these regional quotas but also the successful development of production companies in the region since the 2000s and the strong regional connections with production companies and the talent pool in Manchester. The significant development of Media City in Greater Manchester in 2011 appears to have both drawn screen industries further into the smaller Manchester region to benefit from greater scale economies due to agglomeration but also increased beneficial industrial spillovers to Manchester's hinterland including into the Y&H region.

Relocation of Channel 4 to Leeds in 2021 boosted confidence in the screen industry in the Y&H region, and especially around the wider Leeds conurbation. This increase in optimism about the future of screen industries is reflected across the North of England regional generally, though this may be relative to the existing situation where there are very few opportunities to work in TV and film due to the lack of production companies after the loss of Tyne Tees. The Northeast has witnessed growth in production companies, particularly over the last two years, partly due to investments from the BBC.

There is a key difference between the investments in Manchester and in Leeds. The BBC moved some studios and production to Media City, and this has made a major contribution to local and regional development and to the development of local talent working in the screen industry; this is despite criticism for relocating staff away from London and with few extra workers recruited locally, at least initially. In comparison, the relocation of Channel 4 to Leeds was a relocation of this organisation's headquarters only:

Channel 4 are a channel, they don't make anything, they just buy programmes. They've moved buyers to Leeds, and they're not buying just from Leeds, they're buying from everywhere outside ... So, the direct impact that that's had on Leeds is ... probably negligible, although it's... given a bit of ... fanfare and put some focus on the region and made it feel like a TV region. It's done [a] great PR job, [but] it's not practically moved things there

(mid-career, managing director)

The increase in commissions coming out of the wider Leeds region, the increase in production companies locating to the Y&H region, and the advantage of spillovers from the Manchester and Leeds conurbations generally, are collectively regarded as hugely positive for the screen industries and for local and regional development more generally. These investments and developments have also resulted in fewer trips to the capital to meet commissioning editors, and an increase in exiled screen workers returning home from London.

Despite these advancements, London-centric decision making continues to hold screen industries in the Y&H region back. Interviewees described how commissioning editors based in Yorkshire are still having to convince decision makers in London, who often have a narrow understanding and underappreciation of the region in terms of its geography, its production capabilities, its culture, and its TV audience. Interviewees argued that commissioners need to increase their commitment to the Y&H region, and to the English regions more broadly, and they should commission both longer running and bolder programmes to be made there. They also argued that commissioners needed to acknowledge the vast TV audience in the North who are not served by London-centric programming, and they want programmes that tell stories that relate to the lives and experiences of audiences in the North:

I don't think there's enough commitment to Yorkshire in terms of broadcasters making programmes and ambitious programmes, not just ... blue-chip unscripted programs

..., and being... a bit bold and brave. This should be part of their remit as well, that it might not be something that everybody in the country is going to watch, but you've got a massive community there who do want to watch things about them, about their local area, about their local lives, and be much less London-centric. So, it's happening more and more ... but I think there still needs to be a big push from buyers

(mature career, managing director)

[Commissioners] need to look at the areas that have completely been ignored by television. The Northeast is a really key part of that, and so we've got a commitment to that, because it's not right or it wasn't right that between York and Berwick, which is a three-hour drive, until recently there were no factual production companies at all. That's a massive corner of the North of England that's completely being ignored and not being serviced by broadcasters and production companies ... it all comes down to broadcasters actually committing to putting money into productions coming out of regions

(mature career, creative director)

Interviewees emphasised that it is not only the need to produce local and regional television that a large population desires, but there is also the need to bring employment and further investments to the region, and some interviewees argued that some organisations could do much more to embed themselves in the region and to invest in the next generation of productions and screen workers:

Channel 4 can live up to its promises and stop messing about and stop pretending. If anything, this is why I wanted to take part in this report. They have failed, failed, failed, failed, failed in their responsibilities and their commitments to the community in Leeds. ... In the same period, Channel 5 has spent probably four or five times more money. So Channel 5 are massively invested, not just with us but with other production companies in the region, in absolutely supporting and retaining talent in the region. Channel 4 have failed miserably and, anything you could do to bring that to anyone's attention would be worthwhile

(mature career, creative director)

Although some organisations appear to be under-investing, other organisations were felt to be making a significant positive contribution to production and to the screen workforce. However, increases in demand for screen workers is not without concerns, especially when there is a lack of investment in expanding the pool of skilled screen workers. For instance, there was emphasis in the interviews about large organisations moving their production to the region and scooping up local talent, causing workforce gaps for some smaller local production companies. In this case, dialogue between companies, relocation of skilled workers to the region, and greater training opportunities are needed. This needs to be backed up by funding to ensure that some potential workers without familial financial resources do not miss out on being able to make their positive contribution to the industry and to the provision of programmes for the wider audience.

The government's policy of tax relief has assisted in attracting drama production companies to the region, but while these are considered beneficial, interviewees expressed a concern that the region was becoming excellent in providing a service industry to producers from outside of the region, rather than producing locally developed film and drama. There was a strong consensus of opinion across interviewees that more needs to be done to accrue stronger local and long-lasting benefits to the region, that develops the screen industry for the region, and that builds on incomes sourced from satellite broadcasters:

... what's really hard is the stuff that's about real value, which is how are we investing in the people who create the IP. That's where

you really bring value to the region, and I don't think we're doing enough investment in our producers, writers, or directors

(mature career, company director)

Although tax credits for drama draw production companies to the region and provide some financial support with training and staffing costs, similar credits are not offered to factual producers. Budget constraints continue to be a serious concern over the immediate to mid-term for screen organisations, and this has an effect on the training of staff for the next generation of screen workers.

3.1.5 Social networks and costs

Not all companies are impacted by the drive for regional quotas. Some companies serve mainly international satellite broadcasters who are not bound by UK government regulations. Interviewees commented that international commissioners were not at all concerned about where production companies were located in the UK, as decisions were made on purely commercial grounds. Working with US based commissioners was of particularly benefit, as the US has a growing market and as the companies are winning commissions priced in US dollars, which is currently worth more than the British Pound.

For some companies, winning international contracts is more likely than winning contracts from the London region, because the latter often requires personal connections:

We were trying to bang on the door in London ... to get commissions, and what's in the way of getting those are people's personal relationships from Eton or wherever it is that they've been. And so, we found the US way more of a meritocracy, so for a while we were just like, sod London, ... let's just see if we can win business there ... that sort of equipped us to do more projects with people like Netflix, we've got two projects with Amazon at the moment, and again, we're finding those companies like, more of a meritocracy to deal with and more data driven and more analytical. And that's where we do better as a company, because ... it's based less on who we wined and dined yesterday

(mid-career, managing director)

Having a base in Y&H means production companies were more cost effective due to lower location and staffing costs relative to London and the Southeast. Satellite broadcasters commission lower budget programmes but in greater volume, and therefore they provide longer term stability to companies and their workers than is usually the case in the UK. A base in Y&H has the additional benefit of two great assets: the people and the landscape. The natural beauty of its physical landscape looks amazing on television, and audiences respond very positively to both the accent and to the character of people who live there:

People like watching Yorkshire on the television because you know what you're getting and what people are going to be like, coupled with the economies. We're paying a fraction of the rent at our place [than] we would if we were renting stuff in central London, and staff rates are lower, and we can offer better terms, work/life balance and the commutes are better

(mid-career, managing director)

Alongside the newly established production companies of the late 1990s, the Sheffield International Documentary Festival, first held in 1994, started drawing documentary makers from across the world to the city to meet and network, and this associated the city with documentaries. An interviewee recounted how when a commissioner set up a regional scheme in Sheffield, so a number of London production companies then set up regional subsidiary offices in Sheffield. Although those offices were often under-utilised and were also closed down shortly after the scheme ended, leading to some cynicism of the benefit of such schemes to local production companies, the scheme

was thought to help trigger growth:

... of course, that scheme went and died off and all those offices closed, so the negative story is all those London indies disappeared, but hopefully by then it had already triggered a little bit of something that ... some people felt they could have an independent ... film production company ... in Sheffield. And of course, most of the decent indies were in Leeds, and so that was already ... providing ... confidence

(mature career, company director)

Although this commissioner's regional scheme was perceived to have some legacy in Sheffield, the interviewees' narratives highlight that regional budgets are given to companies with only a subsidiary or temporary office in the area:

[T]he fact is [commissioners' budgets are] not really all spent outside London; [in practice] a lot of it still goes to their mates who say that they're going to open an office in York. That's still a problem that we're trying to fight at the moment

(mid-career, managing director)

3.2 Changing consumption patterns leading to changing production patterns

In recent decades the screen industry has been changing at a fast pace, partly because of government regulation and restructuring, but also because of technological changes and changes in the way that people consume TV and film. Technological change has also affected the ability to produce TV and film. This section reviews perceptions of these changes from within the industry.

Interviewees were anticipating large scale changes in production and business models in response to the changing patterns and modes of consumption of screen industry offerings. The continuation in the switch away from terrestrial television and cinemas to online computer or mobile phone modes of engagement will mean the replacement of current regular content with something very different:

The sort of day-to-day regular content that we make in this part of the world, in the unscripted space, will look very different in five years. And will probably not exist in 10 [years in] the way that it does [at the moment], and the funding models attached to it

(mature career, company director)

The contemporary increase in the digitalisation and automation of the screen industry production processes pose long term threats to the industry. There is the expectation that these transformations will lead to a loss of many types of jobs within the industry, and any expansion of other areas of the industry are currently unclear. Consumers of TV and film started to produce their own equivalents tailored to their liking and identity, and then making it available for others to see on YouTube, etc., which through advertising revenues also make them money:

[coming up] behind us are all those people that don't need a whole group of people doing what we've had to have to make television: like a production management team ... offices, infrastructure, and all of that. They don't need that because they just do it themselves on their iPhone, and they're still achieving the same results. They're making a living, and ... they're making people entertained

(mature career, company director)

This change in the consumption and now production of screen industry outputs is affecting the whole industry. These changes in demand and supply patterns,

and thereby also the changing demand and supply of talent, are redefining skills gaps, transforming the need for and types of skills training, and shifting the needs for all types of capital investments.

There were suggestions that the industry is behind the curve, and that there is a great need to catch up with the provision of skill and capital requirements across the industry to respond to these evolving challenges and threats to the industry. However, these concerns are not new, as this consumer-driven evolution has been with us for decades. Nevertheless, our interviewees expressed frustration at the lack of action on these issues:

I think there's a lot of dithering about, … a lot of talk, and there has been for very, very, very, very many years. It's not [just] the conversation we … haven't had for… 10 years ago, 15 years ago, 20 years ago, … we don't do anything about it. And that's the bit that bothers me

(mature career, company director).

It was not clear from our interviews who should be doing something about this evolution in consumption and production, and even if someone or something can do something about it. What is clear, however, is that there is frustration that nothing is being done and that there is an acception of the inevitable rather than a proactive intervention to benefit not just the screen industry enterprises but also the consumers of high quality regional, national, and international productions that contribute to the cultural fabric of society. This inaction and inertia will have consequences for the screen industry's response (or lack of a response) to changes in consumption patterns and to changes in consumers' habits of engagement with TV and film, and this will impact on the industry's workforce in the future.

3.3 Early career paths and staff retention in the region

The future evolutions of the screen industry will be experienced most by those who are currently early career workers (ECW). Early and mid-career workers are attracted to and often remain in the region. This section improves understanding of the factors that attract early and mid-career workers to the region.

Our interviewees emphasised that ECWs are deeply embedded in the region and plan to remain in the region over the long term. This is because they believe there are increasing opportunities for employment in the industry locally, and because they feel a strong sense of belonging to their local area. It is unclear whether this optimism about the future is going to be realised or whether it merely reflects hope.

Many of our ECW interviewees stated a desire to be located close to family and friends. They also emphasised that they are able to access more affordable properties in the North to rent or to buy, relative to comparable dwellings in London or elsewhere in the Southeast. They described many treasured aspects of living in the North, including the satisfaction gained from their appreciation of the rural landscapes, the welcoming and open attitudes of people in the region, and the size of urban areas. All the ECW in our sample of interviewees studied film, TV, and/or journalism degrees in the region (mainly in Leeds or York), which indicates a strong and actioned desire to live

and work in the area.

Two interviewees grew up and remained in the region for university, because they wanted to be near family:

I thought if I go to Leeds, you can get the train, it's half an hour, all my mates can come on the train if they want to come. So, I thought Leeds ... Leeds is a bit more accessible. But Manchester, I don't know, ... I've not spent much time in Manchester, it's only this year that I've actually started going [there] a bit more to take photos and stuff; and I quite like it, but at the time I thought Manchester's a bit massive

(early career, runner).

Two interviewees moved to the Y&H region from the South of England, motivated by a strong interest in the university courses on offer, and a desire to move away from home. The attraction of attending a Russell Group university was important to them and, although they chose their universities without visiting the region or having prior knowledge of the university cities themselves, they recall that they very quickly grew fond of the local area:

I fell in love with Leeds because of how diverse it is. I enjoy all the different types of personalities, all the different cultures, ... the vibrancy of how much is going on, and it was just so polar opposite to what I'd always known, and I still love it now

(early career, assistant producer)

Attraction to and affection for the area are important in attracting workers to an area for many industry sectors. Similarly, the growth and sustainability of the screen industry in Y&H will significantly affect ECWs' ability to remain in the region.

3.3.1 Staying in the region: it's personal!

All ECWs in our sample decided to stay in the region after graduation. Two returned to live at home with their parents or close-by in their hometown, and they regarded this as a positive move because it enabled them to save money and spend time with their close family and friends.

Receiving family support for housing costs in the period immediately after university, either by providing a home to live in or by acting as a rental guarantor, was essential for those entering short term contracts, as is the norm in the industry. Returning home to live with parents (in locations across the UK) is a usual trajectory for ECW's peers after graduation.

The two ECWs who moved to the region for university decided not to return to their home area after graduation. One was from a rural area with no job opportunities to return to while the other, 'Sarah' (not her real name), was from London, and remained in her university town for a range of complex reasons.

Throughout the first two years of her course, Sarah was determined she would move straight back to London after graduation. In the third year however, she realised that due to high housing costs in the Capital she would be forced to live with her parents, something she did not want to do having established an independent lifestyle in Y&H. During visits home with her boyfriend (who was from Yorkshire) she felt increasingly unsure about returning to the Southeast permanently, feeling it would be hard to establish herself in the screen industry without connections in London, and because it would be hard for them to afford a one-bedroom flat even while sharing costs with her boyfriend. So, together, they decided to remain living in Yorkshire.

While at university, Sarah attended a talk by a regional production company organised by Screen Yorkshire, and instantly wanted to work for them. After contacting the company to ask for work experience, she was offered a job which she commenced straight after graduating. Sarah was also aware of the types of TV produced in the region and that suited her interests, although it isn't for everyone:

I was interested in unscripted TV from the get-go, and I knew there was a lot of unscripted TV in Leeds specifically, whereas a lot of my friends would be more interested in film or high-end TV scripted stuff, so that's why I think they've gone to Manchester or London

(early career, production assistant)

Sarah was lucky in this regard: talks by industry professionals and industry placements while at university are key to initiating or understanding the importance of professional networks and securing a job after graduation. This is demonstrated by one mid-career worker whose university course did not support industry placements, leaving them floundering when searching for work:

That's why I had so much trouble after I left Uni, it was a good year trying to find a job. I ended up working at a supermarket in the interim which just really harmed my mental health and I think a lot of people will probably have the same sort of story when they left Uni. They had so much optimism and drive, and then there are no opportunities. The thing is there are opportunities, but you don't necessarily know how to approach them and how to get them, and that is something that is missing for me back then, definitely. It has probably changed now but yes, I had no idea how to navigate that networking type of thing

(mid-career, editor)

This experience contrasts with that of another mid-career worker who discussed the positive long-term impact of their industry placement, which led to a first job and a career lasting network:

I had such a great relationship with them that even in my Christmas holidays when I came back, I went down and worked at [company name] for the Christmas holidays. At this point, they were paying me a little bit of money; then as soon as I graduated, it didn't really matter what I got [as a university grade], they'd already said: "As soon as you graduate, here's a full-time staff entry-level contract" and I've still got so many contacts of people who are running the industry from doing that

(mid-career, managing director)

3.3.2 First jobs in the industry

Our ECW interviewees were all in permanent or relatively long-term contracts. Although the industry is characteristically dominated by freelance workers, company owners described the region as having higher than average levels of staff on permanent and long-term contracts. They emphasise that this is because of the smaller talent pool in the region, and a need to retain staff. For the ECWs we interviewed, who were predominantly from working-class backgrounds, job security was key to their ability to enter the industry after graduation:

... having that security of having a job, and having a salary coming in, and knowing what you're doing and being able to grow in a role, which I know I can do here, ... I couldn't say no to having a secure job

(early career, runner)

[Freelancers] get the shorter contracts, so if there's an issue obviously and that contract falls through then suddenly their promised income for the next three or four months isn't there. Until recently I lived on my own for four, five years, so, if I didn't have income ... I'd have had no choice but to move three hours down South back to my mum and dad's, and then all those opportunities of where to work disappear

(early career, production assistant)

Freelance: I wouldn't have been able to live. Well, I mean, prices of renting, buying a house and that, ... I very, very much doubt I would've been able to live anywhere else but ... my mum and stepdad's

(early career, runner)

Key factors shaping the long-term stability of the Y&H region, and perhaps for screen workers in general, appear to be both the

introductions made via their university and the contract type of new entrants once in the industry. A lack of university-industry connections hinders the ability to make connections across the industry and impedes the ability to survive in the industry, especially for early career workers. The precarity of employment contracts in the screen industry and the inability to have regular income that is sufficient to live on and survive can also prohibit entry and retention in the industry. It appears that only the lucky ones have a geographical presence of parents with or parents with particular economic backgrounds. Freelance work and the associated uncertainty surrounding regular income, as is characteristic in the screen worker industry, may hinder the retention of high skilled workers in the industry, and force screen workers out of the industry and/or out of the region.

3.3.3 Long term plans to stay in the region

ECWs planned to remain living in the region. Some had moved away to live abroad and decided to return, while others mentioned the possibility of moving away in the future, but ultimately intending to return at a later stage. This connection to the region was strong, often familial and cultural, and connected to their identity, the region's landscape, but also to their chosen careers.

Interviewees perceived there to be increasing work opportunities for them locally, but they also recognised the region's comparative financial benefits and opportunities, including the possibility of future home ownership in the region due to the lower cost of living, and this was particularly important for those considering raising a family. London, the UK hub for the screen industries, did not appeal as an attractive place to live due to its sprawling size, high cost of living, and the busy lifestyle:

I never thought about London because even Leeds to me still feels really busy, and that's probably just because at home we're literally surrounded by fields. London has never appealed to me, and my sister did a year there, a sandwich year there, and I used to go and visit her, and I used to think 'Oh my God, I can't think of anything worse than this'. I've never liked the idea of living or working in London

(early career, assistant producer)

If I want to start a family, I think it'll be difficult to do it in other areas, and I know more people up here who are able to own property than in the south where you're renting for your whole life. And so, I think that sort of stuff will also impact my decision. I do feel quite settled at the moment and kind of progressing slowly ... I don't see a reason to leave Yorkshire

(early career, assistant producer)

If possible, I'd not mind staying in Yorkshire, because I like it. But if I got a gig further down south, I'd not mind moving. I wouldn't say permanently, but I'd not mind moving ... but I don't know, with how the landscape's looking at the minute, I feel there might be some opportunities up in Yorkshire

(early career, runner)

Living somewhere quiet, and calm is super important. And being able to just go outside for a nice long walk. We know that we wouldn't really want to do that anywhere other than... well, you couldn't do that anywhere, other than Yorkshire

(early career, producer).

connection to the region was strong, often familial and cultural, and connected to their identity, the region's landscape, but also to their chosen careers.

The potential for ECWs to develop and sustain a successful career in the region, without spending a period of time in London,

was also highlighted by company directors:

I used to say to people, 'Go to London'. I used to say to them, 'You're really good, I think what you need to do is go to London for a few years and then come back'. But I don't say that to them anymore because I don't think there's any difference now

(mid-career, creative director)

In common with ECWs, mid-career workers were deeply embedded in the region. Other than abstract daydreams of living for periods in New York or Paris, all were planning to remain living in the region long term. Many had worked in different cities within the region, and in Manchester, commuting from a single location:

We haven't moved far at all. I commute to Leeds. I would commute to Manchester as well if I had some work in Manchester. Sheffield, I'd commute to Sheffield

(mid-career, editor)

Others work from home and commute to London, not wanting to live in the Capital:

I know lots of people who still live in Yorkshire, but they work in London ... I know there's people at Netflix who I'm friendly with who work in London ... but they don't want to leave Yorkshire, because this is where their home is

(mid-career, managing director)

The majority of mid-career workers we interviewed were born and raised in the region and had strong family ties and a strong sense of belonging to the area. This was particularly felt by those who had moved away for periods of time but were drawn back to the region:

Fun though Australia was, I think we were ready to come back ... there was just that draw of friends, family ... You get new friends wherever you go, but there is a definite draw to where you're from, whether that's specifically a town or the country. You work as a Brit in Australia, yes it's good and yes it's fun, but there's always that slight feeling you talk differently to everyone else, the humour's slightly different, all of those things

(mid-career, director)

Of the two mid-career workers who initially moved to the Y&H region from elsewhere in the UK, one moved for university while the other located in the region to set up a regional office as part of a London company's response to regional quotas. Both remained in the region long-term as they like the sizes of the cities, the welcoming character of local people, and were settled in nice areas, with affordable houses and children happy at school:

We did think about going back down [South] but the thing is that ... we kind of made ... a decision where the kids were happy ... We got the right house and it's nice, in the middle-class suburbs, and all that kind of stuff, ... with the trees and etc, so it just felt safe, you know?

(mid-career, company director)

I think people [in the North] are more openly approachable and friendly [than in the South], or I found them to be such. And it felt like that when I moved to Leeds as well, that there was ... a sort of guard that was down and people were ... just much more open. I was about to say it's a bit like New York, but, you know, places ... have different kinds of cultures, don't they? And that's what it felt to me. So, I just stayed

(mid-career, company director)

Both of these mid-career interviewees had been offered jobs in London but decided not to move there as their respective children were settled. The cost of property in London was too high for them, and they felt a strong sense of belonging in the region:

There's loads going on in London, obviously, and I spent so much of my time on a train ... I spent so much of my time in London [that] there are ways in which it would be better [for me to move there]. But ... I always get

pulled back because I feel my heart's here, even though I don't really come from here

(mid-career, company director)

Mid-career workers commented that they know a large number of screen workers originally from the North who currently live in London and who would like to return home. Company directors had regular enquiries from such individuals asking about work opportunities in the Y&H region. Being close to family and having access to more affordable housing and a lower cost of living are some of the attractive elements that the region has to offer. As remote working has become the norm, living in the region while working in London or elsewhere has become increasingly possible, but it is the availability of jobs locally and the confidence that regular work can be secured with respected and appreciative employers that entices mid-career workers to locate to and remain in the region:

People can see that Leeds is on the rise. And because a production company like us exists, and we've got really good relationships with the people we're working with, I think that is encouraging for people to ... spend a quarter of what they were spending on their accommodation [in London] and have something. You could buy a beautiful five-bedroom house by the park here for what you can buy a two-bedroom flat in London for

(mid-career, company director)

Enticing mid-career workers back to the Y&H region from places like London was considered by many as a potential solution to the need for more talent in the region, especially at the mid-career level. The opportunity to return home, and the lower cost of living and property, were perceived as powerful attractors. For women particularly, returning to live near parents who can help with childcare is also a motivating factor. But the main barrier was the perceived lack of secure regular or long-term employment.

Enticing mid-career workers back to the Y&H region from places like London was considered by many as a potential solution to the need for more talent in the region, especially at the mid-career level.

Commitment from commissioners and the production of long running series was posed by our interviewees as a solution, and the BBC's move of Match of the Day and A Question of Sport to Salford were advanced as examples. A second barrier to returning North was an individual's sense of their professional identity and fears that this might be adversely affected if they live and work outside London. This dynamic has changed to a degree since COVID-19 and the normalisation of remote working, but more needs to be done to convince screen workers inside and outside of the region that they can work remotely at the same level of seniority, and that they would not be missing out on the opportunities available to them in London:

In some senses it is about, 'Does that reduce my status?' I think for example, Leeds has got a high brand quality at the moment because of Channel 4 and because other things that are going on and people are beginning to think, 'Oh, maybe there's a bit of a cool thing there.' And I think people are, since COVID, they've managed to see how you can work from a distance. So, I do feel people can achieve it and it doesn't damage their identity

(mid-career, company director)

I've been saying to the guys here, because they were like 'Oh, we should do a big talent thing in a pub in Manchester and invite all the Manchester talent and just do a networking event,' and I was like 'Well,

yeah, but why don't we do a networking event in Soho and invite everyone in London that's from the North rather than do one here.' Because we know everyone here, I said 'Let's do one there and just say 'Are you thinking of moving back? Come to this thing and we'll do a big thing there, and we'll put Rightmove on a big screen and we'll show them the size of house they could live in.' ... That's where this talent pool that I'm talking about is, that is a quick and really effective way of growing something up here; it's let's get ten, twenty people back, but for them to come back they need to feel there's job security and that there's exciting projects to work on, so then it becomes chicken and egg

(mature career, company director)

There's a lot of Northern exiles still all around the country that have left not because they wanted to necessarily, but because the work wasn't there. And the work is there now on the whole, but they're kind of like, 'Well, am I coming back for three months? Because I've got a house in London, or my kids at school, I'm not just going to leave for three months' commitment, I need a longer contract than that'

(mature career, creative director)

I've seen a lot more move back now ... because there is much more of an industry, you can have a proper career now. Not that you couldn't before, but I think there were limitations to the type of work that you could get out of London, and the frequency of it as well. So, if you're freelance, of course, you need to know that there is plenty of work out there if you're going to move out of London because it has been so centred around London. There are little pockets in Bristol ... natural history was a big thing there. But I think it's different if you're freelance. You've got to know that there is enough work and enough interesting work as well to move back

(mature career, company director)

I'm talking about colleagues of mine in commissioning who are talking about moving back up here, they're all women and a lot of them would like to move up because it'd be better to be nearer their families, that they get more support in terms of childcare. So, I think that's really interesting and really, really true, and really resonates with my sort of lived experience

(mid-career, company director)

A range of socioeconomic factors are therefore key in attracting and retaining early career screen workers in the region. Particularly important are the availability of local employment opportunities, good places to work, longer-term employment contracts, lower house prices, as well as the presence of familial, social, and professional connections. So, with Y&H having so many positive attributes, why are some workers exiting the industry?

3.4 Workers exiting the industry

The screen industry is at risk of losing workers from the sector. Since the start of COVID-19, 27 percent of younger creative workers are reported to have left the industry (O'Brien et al., 2021). Mid-career workers, particularly women, are considering leaving the industry, due to difficulties in managing work and caring responsibilities (Wreyford and Kennedy, 2021; Ozimek, 2020). By investigating early and mid-career workers' experiences and future plans, this research improves understanding of the threat of workers leaving the screen sector in the Y&H region.

None of the screen workers we interviewed were considering leaving the industry, at least not in the foreseeable future, but their accounts highlight issues that may drive their peers to consider exiting the industry. Interviewees described how fellow graduates of film and TV courses wanting to enter the industry were not doing so for a key socioeconomic reason: the short-term contracts on offer prevent them from being able to secure rental accommodation due to the length of property rental contracts often being significantly longer than job contracts; the same issue prevents them from getting a foot on the property ladder.

One possible option for those who want to enter the film and TV industry is to rely on the financial support of their parents. However, after supporting children through further education, familial resources are diminished. Those without sufficient family financial support took permanent jobs in other industries so that they could secure a housing tenancy agreement:

The majority [of my peers in education] don't work in telly. ... Everyone just really struggled to find work and a lot of people didn't want to go back to living at home. So the weight of finding employment to pay for rent, you've still got to pay your rent, ... [led peers into a different industry] so they ended up going for different jobs that were ready for them then

(early career, production assistant)

In spite of all of the benefits of working in the industry to the screen worker and graduates of film and TV education courses, the precarity of employment contracts relative to contracts in other sectors can lead enthused and appropriate early career workers to not enter the industry. Short contracts, sometimes long hours, and low pay are issues of concern that impact on the ability of early career workers to be able to afford a particular standard of living.

some potentially excellent ECWs are unable to enter the workforce because of the practicalities of being able to financially survive with an acceptable standard of living

Issues of housing and parental financial support were also highlighted by company directors when they discussed the diversity of the workforce in the industry. Concerns were raised that the employees' need for parental financial support in the first few months after graduation is a barrier to working class ECWs entering the industry, and this barrier can result in a mis-match between the skills of the worker and the needs of the organisation:

We've got kids going to university and every university in the land is doing this kind of TV broadcast degree of some sort or another, and they're producing far more kids than can actually get jobs. And the ones that can't stay for six months after they leave university for a job, because they haven't got parents that can support them [financially] in their flat and things like that, are the ones that drop away

(mature career, company director)

The result of this need for parental financial support immediately after they graduate and often into their first job means that working in the industry is not simply a reflection of ability and enthusiasm, but also how well the ECW's parents have done in the labour market. Although this may reduce competition for screen worker jobs for those with parental financial support, it is concerning that some potentially excellent ECWs are unable to enter the workforce because of the practicalities of being able to financially survive with an acceptable standard of living. The long-term effects of employment precarity on the regional, national, and international competitiveness

of the screen industry are unclear.

Working consistently long hours under high levels of pressure are causing stress and burn out among workers at early and middle stages in their careers. With screen workers regularly working 60+ hour weeks on a production, individuals are often working at below the living wage, and in conditions that create additional risks to health and safety, as well as to their mental health. Insecure working patterns create financial instability for freelance workers too, who commented on relying on their partner's income to maintain their household budgets:

We try so hard not to push people in terms of their weekly hours, and we try to give people time off and things like that. It's absolutely impossible to say to somebody: 'you're doing a 40-hour working week'; the industry doesn't operate in that way, and I think that's an accident waiting to happen. ... I think probably it will end up being an awakening when somebody does something daft in the industry

(mature career, company director)

We talk about the living wage, but most people in television are just below exec producer. ... If you divided the number of hours into their salary, the living wage is a nonsense for most of them. So, I think that says something that ... probably needs thinking about in the near future, because there's a race to the bottom

(mature career, company director)

... we've got an industry that stands on its hindlegs and talks at length about people's mental health, bullying, and all sorts of stuff like that, but at the same time creating the very conditions that allow that to prosper, and that is the biggest single thing that we need to address in the industry at the moment

(mature career, company director)

There are strong gender related issues of concern in the industry too, that may have an effect on the probability that women remain in the industry. The male dominated culture of the industry has created difficult conditions for women. Women described working in 'boysie' environments, where bullying and sexual harassment were the norm:

Women have consistently missed out in this industry ... and 10 years, 20 years ago it was an incredibly misogynistic industry: loads of bullying, loads of sexual harassment, loads of stuff that is just absolutely not acceptable

(mature career, company director)

The industry's just, as I'm sure you're aware, pretty vile in a lot of ways and particularly to women and younger women. I think we'd all experienced it and reached a point where we just ... have to run something that isn't like this. We have to work in a different way, and it is possible

(mid-career, company director).

Long working hours and regular trips working away from home take their toll on the main carer in a household, and these duties often rest on the shoulders of women. One female freelancer described losing a job when she became pregnant, and on working night shifts in another seemingly prestigious job, with work characteristics that meant she worked alone and felt isolated, which heavily impacted on her mental health and left her struggling to care for her small children.

In response to these working conditions, and with a desire for a different way of working, a small number of female-led production companies have formed in the region. Family-friendly working patterns and local production are prioritised, as well as a focus on telling stories that male dominated production companies may not be able to tell. However, these companies are in the minority and require capital, confidence, and strong networks. It is difficult to know the full extent that women are leaving the industry because of the difficulties of balancing work-life demands and because of misogynistic work characteristics:

Way before the pandemic, we were very hot on flexibility ... I remember once telling a commissioning editor that someone had just gone out to pick their kids up on the school run and she'd be back in an hour. And she said, 'oh, my God. No one has ever said that to me before' and I said, 'well, just because she's gone to pick her kids up doesn't mean to say she's not a brilliant producer!'

(mature career, company director)

The projects that we've worked on, they were quite boysie, quite male orientated, quite male focused. And I think we felt like there was a ... space for a different type of story and that we might be the right people to do it, so not that we're female focused, but that we're not male focused if you see what I mean

(mid-career, company director)

We wanted to set up a company where we lived with our families, as opposed to travelling all [the time] ... but being a producer is quite difficult outside of London and ... we felt like, if we could grow something where we lived, we'd be able to grow the industry here, but also be based here ourselves, rather than having to move all the time

(mid-career, company director)

We have a different work-life ethic to a lot of companies, and I think women are moving in that direction ... we're grafters, and work really, really hard, but ... we try to ignore each other on Fridays, for example ... We have a way of working that enables a life-balance, but not because we have children to look after, mothers to look after, family, elderly relations; all of these things we recognise is a part of life and we don't do people down as a result of that. I think that's been very difficult to pursue in the media industry too

(mid-career, company director)

3.4.1 Approaching retirement

Mature workers argued that the most important skills needed for the future of the industry were in understanding, developing, and implementing new business models.

In addition to socio-cultural biases present in the industry and in society more widely that augment the stress of working in the screen industries and potentially elicit early and mid-career workers to leave the industry, there is a generation of screen industry workers who are now approaching retirement. Many of these individuals experienced the boom in independent film making in the 1990s and have a huge wealth of knowledge that could be lost with their exit from the industry. This raises issues for succession planning and the potential costs on the industry due to the loss of knowledge and networks of mature career workers.

Mature workers argued that the most important skills needed for the future of the industry were in understanding, developing, and implementing new business models.

Mature career workers are committed to supporting the next generation of screen workers and are exploring ways to increase diversity in the industry and to develop talent regionally. Those mature career workers from working-class backgrounds who benefitted from high quality training and experiences in ITV, regional radio and newspapers were particularly conscious of the need to find ways to support local people from working class backgrounds. In some companies, succession planning was happening as roles and responsibilities were being handed over to mid-career workers. Elsewhere, independent companies had been bought out by larger companies, which was considered to be beneficial because it could provide long term stability.

Intriguingly, our interviews with mature career workers suggested that they are not concerned about a loss of skills from

the industry when their generation retires, because they argue that many of the skills they had in production management would soon be obsolete anyway, as traditional forms of content production change, and because technology allows for content to be made without the current business infrastructure:

I think what … goes with my generation is the business infrastructure that's employed a lot of people and driven a lot of business in the traditional forms of content making. … behind us are all those people that don't need a … whole group of people doing what we've had to have to make television, a production management team, … offices, infrastructure … and all of that. … So, I'm not sure that "loss" is the right way of describing it; I don't think it's a loss. I think we've made our contribution at a time when it was valid, in the same way that the milliner on the high streets in Leeds in the 1930s through to the 1950s was serving the market with hats. There's no milliners on the streets of Leeds now because hats aren't worn

(mature career, company director)

What I'm really keen on is seeing the next generation through now, and clearly markets are changing and to a large extent, funnily enough, we're still … pitching to ITV, BBC, Channel 4, Channel 5, if you like the terrestrial channels, but the budgets are going down on the whole for factual. So, you actually start to think where actually is the money?

(mature career, company director)

Mature workers argued that the most important skills needed for the future of the industry were in understanding, developing, and implementing new business models. As consumption habits and funding mechanisms change, new thinking is required to enable future generations to continue to make a living from producing content for screens:

You want somebody coming in to run it, or somebody that's come through the process of really identifying where the business can grow, and whether it's through advertisers funding things, whether it's through going back to the world of corporate production, or whether it's setting up channels on YouTube or whatever. I think it just needs to have people onboard who really are confident that they can look at ways of monetising a creative library and a creative team

(mature career, company director)

At some point down the line … the sort of day-to-day regular content that we make in this part of the world, in the unscripted space, will look very different in five years, and will probably not exist in ten, the way that it does [at the moment], and the funding models attached to it. So, for industry, it's a kind of a 'get by' situation for now

(mature career, company director)

You look at the demographics, the numbers, the ratings, the funding mechanisms, the funding formulas; … it's got to reach a point, ultimately, where it's not commercially viable. Especially, when you've got a region that's got maybe eight or nine indies. Some really small, some much bigger, all competing for the same sort of spots. It stands to reason that the lovely 'One Man and His Dog' won't be able to operate in that way, because you can't develop shows without the funding to develop the shows. So, I think the whole thing could become very niche

(mature career, company director)

There are two groups of individuals reflecting on whether and for how long they should remain in the industry: exiting early and mid-career workers, and retirees. For the early and mid-career workers, social factors were emphasised strongly as reasons why these individuals exit the industry. We found no evidence to suggest these screen workers feel out of love with the industry or began receiving lower levels of job satisfaction

after a particular point in time in their career. Instead, we found that a key reason why early and mid-career workers were unable to enter the industry or stay in the industry was because it simply didn't pay enough to enable them to have an acceptable standard of living without having to rely on financial support from their family. Also important based on our interviews were concerns that the workers experience a combination of long working hours and regular trips working away that are not conducive to those with caring responsibilities, which often rest on the shoulders of women. Misogynistic work practices also add to the difficulty of working in the industry for women, though there are an increasing number of often women-led companies that have installed family-friendly working patterns and do not accept and instead extinguish activities that could be prejudicial towards women in particular.

Our interviews with mature career workers revealed a clear recognition that the loss of their skills from the industry due to their retirement will not be a significant loss because of the need for new skills and working practices that have become necessary due to changing consumption and production habits, which themselves have been associated with technological change. What is less clear, however, is whether retirements result in the loss of industry-wide knowledge, leadership skills, vision, and social networks, and whether these losses will affect the performance of the industry moving forward.

3.5 Social and professional networks

The screen industries rely on informal networks for collaboration (Ozimek, 2021), yet not much is understood about who workers and firms are connected with, how they connect, and which connections are regional, national, or international. Production companies based in the region are well known to each other, and while co-production is not common, companies co-operate to share knowledge and support:

We have an indie club, for example. We meet up a couple of times a year and it's not really to work together; it's to talk about issues in the industry, things like skill shortages, commissioning editors, the issues of the day, the sell off or proposed sell off of Channel 4, those sort of bigger industry questions rather than doing a co-pro or something

(mature career, company director)

We've got a good relationship with other production companies, so although technically we're all in competition, I think our first stage would just be that we know other people in the industry and you'd phone up and say, 'Have you ever worked with this broadcaster before?' or 'How would you go about filming something in this place?'

(mid-career, managing director)

3.5.1 Coopetition

Coopetition is a characteristic of this industry in the Y&H region. Production companies share resources; for example, company directors described using another company's editors during a down period:

There are bigger companies like [company name] … We've been lucky that we have been able to use some of their editors who've got down time, because they've got enough editors that you can have days when, from their point of view, they're not as busy … so that's been quite good for us,

that's where we've been able to kind of pick up edit time

(mature career, company director)

We have an editor who lives locally and then he'll do the edit. And then we'll take it to a production house in Leeds, usually to finalise the program. But if our friendly local editor is too busy, we've started going to [company name] and we use one of their editors and use some of their production facilities, but they'll probably still end up at [production house name] in Leeds to finalise the programme

(mature career, company director)

The closeness of the organisations in the region means that news can travel fast. This is useful when understanding new developments and supporting each other. The sharing of operations and skills when one organisation has spare capacity and the another is working at full speed means that the region's screen industries are stronger as an industrial group:

What's brilliant about this region is people talent share; we share between the other companies. They go; they come back; they go; they come back. And each step along the way they're picking up more experience and they might leave as an associate producer and come back as a producer

(mature career, company director)

It also means that reputation travels fast, which is an advantage for some. For freelancers, professional reputation is more important and valuable in the region than in London. In London, a freelancer can go from job to job, learning new skills and increasing their value. However, as the industry is so large there, freelancers can also do the opposite: they could go from job to job, without doing a particularly good job, but without significantly damaging their reputation, as former clients are unlikely to meet. However, in the North, where the industry is so much smaller, news travels fast and reputations are much more important, meaning workers are more committed to their job and reputation. As there are also fewer freelancers to choose from in the North, workers are often given more responsibility with less experience than would be the case elsewhere:

Everyone here is so committed and I ... find that people up here work harder and care more. It's less mercenary

(mid-career, creative director)

3.5.2 Effects of COVID-19 on social and professional networks

The move to remote working during COVID-19 lockdowns opened up networks in the industry, changing where people were located, who they work for, and how they accessed decision makers. Production companies used freelancers based inside and outside the region, with a large proportion based in the North of England. Before the pandemic a production team would expect to work in the same office, and they would hire based on geographical proximity as much as on ability. Since the pandemic, freelancers have been working for production companies based nationally and internationally. This change has had an impact on pay rates too as, for example, a Leeds based editor can now be working for a company in Los Angeles or in London, and get paid Los Angeles and London rates, whereas previously there was a differentiation between Leeds and London pay rate.

During COVID-19, commissioners drove down budgets and production companies agreed with these new lower contract prices because they wanted to sustain the industry in a time of crisis. However, commissions have not returned to their pre-pandemic budget levels and prices continue to be driven down. Lower levels of income, a shortage of skilled labour, and an increase in freelancer wages, collectively pose a serious threat to the long-term viability of the industry. The cost-of-living and energy crises add to this pressure for companies

and workers:

If you were to look at Companies House, the big ... established independent production companies, their figures tell their story that they're ... achieving turnover, but they're not making any money. ... in the mid-term ... that's going to come home to roost. And some companies will go bust in the next two or three years because it's ... not sustainable what we're trying to do at the moment, and ... it needs an honest discussion across the whole industry ... to correct that

(mature career, company director)

remote working during COVID-19 lockdowns opened up networks in the industry, changing where people were located, who they work for, and how they accessed decision makers.

Nevertheless, remote working has pros and cons. On the negative side, not meeting in-person can entail a loss of control and an oversight of processes, prevents skills learning across teams, and can lead to isolation and related mental health issues. On the plus side, however, companies have a wider pool of talent on which to draw, and companies who were producing content outside of the region can hire talent local to the shoot, thereby reducing travel costs:

We tend to work virtually, it's not like we walk into an office. But that does allow me to work with a greater pool of people around the country rather than just being centred in Leeds

(mid-career, company director)

We also learnt this from COVID, that say we have to make a film that's in Taunton. You can put an ad on Talent Manager and say, 'Producer director required, two days' work, certain day, Taunton area'. If you're lucky, you might get half a dozen people, and some of them will have done [name of show] before, so you kind of manage it by long distance. You get them to go along, you don't pay travel, you don't pay an overnight, the budgets are so tight

(mature career, company director)

They are all over the place. ... There's about nine of us, I think, of which we live in Leeds, York, Doncaster, Sheffield, London, that's the sort of the main bit, and then we've got about 20 projects and ... for each project that we're working on we've got writers in ... London, but we've got writers in, Cardiff, in Australia, in America, all over. ... I think we always assume if they don't live in Leeds they probably live in London, but they don't, they live in Norwich or lots of people live in Brighton, all over the country. ... I think it's easy as a writer to live in all sorts of places. And then the people that we're bringing in as freelancers similarly, they don't necessarily live in London, they might live ... all over. So, ... lots of people live near enough to London to give the impression they live in London, but they don't actually live in London. ... and then we're working with business affairs people who are also all over the place, including an awful lot of people in LA and a lot of people in New York

(mid-career, company director)

3.5.3 Relationships with commissioners, jobs for the boys, and in the importance of regional connections

The shift to remote working driven by the COVID-19 pandemic opened up networks and changed companies' relationships with commissioners too. Commissioners based in London now more regularly host online meetings with regional producers, and production companies are now able to connect and meet with commissioners internationally:

You've got a number of companies outside of London who, during the pandemic, came into their own really, because all of a sudden Zoom meant that you couldn't meet a commissioner. That took that out, having to go to London

(mature career, company director)

During COVID there were a lot more Zoom meetings with worldwide commissioning editors who don't care where you're based. They just want to hear your idea

(mature career, company director)

These COVID-19 induced changes are enabling production companies in the North to break into the tight industry networks in and surrounding London, simply because spatial proximity is reducing in importance.

However, interviewees described a London ecosystem in which workers, who are often characterised as Eton and Oxbridge educated, regularly moving jobs between commissioners and production companies, and so are in a position to create lucrative job roles for themselves. This creates a culture in which they are all scratching one another's backs:

There's a sort of economy there where they're all scratching each other's backs … and you might commission me because I might come and offer you a job tomorrow, but … that's not going to happen if you're in Manchester. I've immediately lost my power … to poach … or even be part of their future career aspirations

(mid-career, managing director)

So, rather than workers moving between commissioners and production companies, in the Y&H region it seems that workers' connections allow them to move between production companies spread across a wider region in the North of England (from Liverpool to Manchester, Leeds, York, and Sheffield). As the industry has grown across this wider region, it has become possible for workers to spend their whole career in the North without having to move to London, which is what they would have done ten or twenty years ago. Interviewees argued that further improved transport connectivity across the North of England would enable the industry in the wider region to grow further and be a credible and sizable competitor to the London region:

… there are now lots of people here who wouldn't go to … and have never been to London … and don't need to go to London. So, it is improving, even if we're moving people around the Pennines to get experience, at least they're not having to go to London

(mature career, creative director)

I think that the North works quite well in terms of crewing up between Leeds, Manchester and Liverpool and Sheffield, and surrounding areas. It is as good as London in terms of how much is going on

(mature career, company director)

The geographical proximity of organisations across the Y&H region and to Manchester was discussed as a positive factor for production companies in Leeds, as they are able to draw on a wider talent pool that stretches from Leeds to Manchester and Liverpool. The lack of post-production facilities in Leeds is regarded as a significant limitation of the city, but the connections along the M62 reduce this shortcoming.

Nevertheless, interviewees considered the lack of movement on Channel 4's proposed plans for a post-production centre as a missed opportunity for Leeds. The lack of post-production facilities in the region is causing one company to consider closing its Leeds office in favour of Manchester. The costs of developing a post-production facility in Y&H were considered too great for one company to undertake alone, requiring a co-ordinated approach across the region:

I think you can't compare [Leeds] to Manchester, because there has been more money pumped into Manchester over the years and there is a bigger community out

there, but there is no reason why Yorkshire can't emulate that. It's just not there yet

(mature career, company director)

Even if you have a post-production house and you have lots of editors … you [still] need really skilled people to be able to do that, and I don't think they have that … in Leeds. So you need a post house to train up all of those people, get them to move to Leeds as well, or train them in London, move them to Leeds … or just sort of set it up, have people training people locally

(mature career, company director)

In spite of the switch to greater online working, interviewees stressed that transport links between the region and London, across cities within the region, and to other Northern cities like Manchester and Liverpool, are performing sub-optimally. Interviewees described motorway routes as impossible and train routes as hugely disrupted, which constrains the development of the industry in the region, and across the North generally. Speedy and reliable connections between Leeds and Manchester would enable organisations located in those cities to combine forces and significantly develop the strength of the industry across the region:

Transport between Leeds and Manchester is just disgusting and … that would make a big difference if people were able to move half an hour between Leeds and Manchester. I think Leeds and Manchester would give London an absolute run for its money because there's so much exciting stuff going on, and considering it is only 40 miles away, it shouldn't be the massive pain in the ass that it is

(mid-career, company director)

The social and professional networks that exist across the Y&H region within the screen industries is undoubtably a significant asset that strengthens the industry and supports individual organisations when they have limited capacity. COVID-19 has also had some benefits for organisations working in the region, as being in close proximity to commissioners in the London region no longer is a clear advantage, particularly when lower costs in the Y&H region put them at a competitive edge. However, the movement and networking of commissioners in London and the Southeast sustains the importance of some social connections that continue to benefit firms based in London.

Although the coopetition between screen industry organisations across the North, their strong social networks, and the mesmerising regional landscape continue to give the region's industry undoubted strength, it does not appear to have achieved its potential as a powerhouse for screen industries because of some clear constraining factors. The size of the industry in the region and the strong connections between screen industry companies locally enable a sharing of talent and personnel that empowers staff to gain experience and training, which fills part of the gap that was left by the demise of the regional producers.

3.6 Skills gaps, skill switching, and training needs

We investigated the skills gap among graduates entering the TV sector and specifically the mismatch between educational and training provision and the skills needed in the screen industries. This is important for the attraction and retention of graduates from FE and HE and particularly from courses that feed into the latest innovations in the screen industries. We found contrasting opinions among ECWs and employers when discussing the skills gap among graduates entering the TV sector.

3.6.1 Early career workers' views

Early career workers felt the skills they learnt at university prepared them to work in the sector.

Early career workers felt the skills they learnt at university prepared them to work in the sector. They felt equipped with the journalistic skills of how to tell a story, and how to communicate effectively. More practical skills were learnt during placements within industry while at university, and through experiences of working on student radio/TV and in other student societies. Guest lectures at university by industry professionals provided useful knowledge about potential job roles, and university staff provided career guidance:

I think a lot of people leave and go 'Oh, my course didn't help me at all.' But I was like, well, actually, it definitely helped in basic journalism skills, and how to craft a story, or how it should look. But, yeah, the practical elements of the course - the cameras and whatnot - you actually got more hands-on experience at the societies

(early career, producer)

The most popular [module at university] was Advanced Cinematography, which I didn't go anywhere near, but I chose TV Research Skills, which was all about unscripted TV. They brought in guest lecturers every week and that one really prepared me. I did personal supervisions with one of my lecturers, and he really helped me with my CV and choosing what path I wanted to go into in TV, which was really useful

(early career, assistant producer)

Once in work, some ECWs were accessing additional training and some were able to access funding, but the cost of a lot of the training was prohibitive. Working on side-projects outside of work hours was considered a useful way to develop new skills that could help them climb the career ladder and move into areas of the industry that they were most interested in. One interviewee mentioned working with a specific film organisation in the North in their spare time, creating short films. Another interviewee, who was working in factual production, disclosed their ambition to work in drama; they had experience of making a film at university but felt these skills were insufficient to get them into an assistant camera role. To learn new skills, this interviewee was planning to make a film with friends from their course, with the intention of developing confidence to apply for roles working behind the camera:

I learnt a lot when we were in the last year of Uni, because I worked on three films, and I did focus-pulling on two of them and then I shot the entire thing ... So, that helped, but obviously it's not enough to go from that to working on a big budget drama; it doesn't really correlate. I'm hoping to shoot this planned film, and then I want to try and jump on some other films, not paid, just jump on some of the films and see it, and learn that way

(early career, runner)

I was fortunate that I had a very, very

good lecturer, and he was fab at preparing people for what it was going to be like in the telly world. So, a lot of the skills that I'd had, I knew that they were base points that I would then learn more [of] and grow when I got somewhere

(early career, assistant producer)

3.6.2 Employers' views

Employers on the other hand, had different views, with the majority stating that universities do not teach the necessary skills for an entry level job. University courses were understood to be focusing on the theoretical aspects of film and TV, and on training students in directing skills. Employers also perceived that universities gave students unrealistic expectations for their careers in the screen industry. Good communication skills, skills in project management, as well as research and story-telling skills were communicated to us as missing elements of the set of skills that they want graduates to possess when they employ them on graduation:

[The] syllabus, curriculum, whatever it is, it needs really really thinking through as to what are you teaching these kids? … Are they doing [the degree] because they want to work, or are they doing it because they want to be a film-maker? There's a big difference, and I think that that needs sorting out because it's really confusing. Kids come with very, very limited skills into the marketplace, and we have to do all the training and have none of the funding for that

(mature career, company director)

I think partnering with production companies to deliver on-the-job training, albeit attached to an education establishment, like [University X], might be a really good way of doing it. I don't know what role the University could have in retaining people, keeping people, getting people to stay. But as part of the curriculum, or part of the syllabus, there really ought to be enforced watching of content so that the students are informed

(mature career, company director)

[Universities] don't really teach the skills you need for an entry level job … What they do is they teach you a general idea of how to make a film and they don't necessarily pick up the core skills that you need to do entry level work. You might be able to direct something, but you are not going to become a director. … [It's] actually it's a really broad job

(mid-career, editor)

Our instinct still is to recruit from journalism courses rather than theoretical film and TV courses because you get that worldly-wise knowledge, real world ability to chat to people from the journalism background, as opposed to the theoretical study background, which is more suited to the programmes we make

(mid-career, managing director)

Perhaps as a result, some employers felt that it was not necessary to have a degree in film and TV to enter the industry, and many were keen to employ those who had not attended university:

I've never been that bothered about what degree they had really because, to me, it's more about their ability to recognise a story and want to tell … a story, and maybe knowledge in a certain area. And also will they fit in as part of the team

(mature career, creative director)

Other employees highlighted the importance of ECWs skills to their company, claiming that ECWs often have very different skills than they themselves had when entering the industry, particularly in their understanding of new production techniques and new consumption habits:

… from a business perspective and from a job creation perspective, we need younger people with different skill sets, and different ways of creating and consuming

content

(mature career, company director)

... there's people coming through now who've got probably far more skills. I never learnt how to pick up a camera or to do an edit on a computer, I mean I can't do any of that. All I can do is tell you what makes a good programme and help people make it ... My only skill I learnt as a journalist, a newspaper journalist, of what a story is and how to tell a story and how to be factually correct

(mature career, company director)

The employers in our interviewees regularly highlighted the importance of communicating the wide range of job roles that exist in the industry, beyond directing and the senior creative roles. They deemed greater knowledge of the breadth of job roles to be important for preparing undergraduates for the realities of work in the industry and for informing them of the varied career paths that were open to them. Employers highlighted the importance of inspiring school age children too, and informing them and their parents about potential career paths. This was considered partly a 'hearts and minds' operation, as children's parents with little knowledge of the industry may be resistant and guide young people away from the industry:

I think the most important thing is to get people to understand what the jobs are. I mean, whenever anybody has skills, there'll be a job in screen for you and I think that's whether you enjoy hairdressing, bricklaying, make-up, logistics, organising, there's a job in television for you. And I think we don't say that enough and, again, not inspiring kids

(mature career, company director)

[We need] to be a bit more cohesive, in terms of that kind of creative story and have bigger ambition, invest more in understanding the pipeline of talent, understanding how you inspire children at junior school, to seek a creative career, not wait for them to go to university, and try and discover it for themselves

(mature career, company director)

This perspective was corroborated by the interview responses of the ECWs and mid-career workers. When discussing their interests and career paths, the overwhelming majority of interviewees, at all career stages, described a keen interest in TV and film from a young age, and many decided as teenagers that they would like to have a career in the industry.

However, parents provided mixed levels of support and guidance on careers, and many interviewees described their parents as having little knowledge of careers in the industry:

I had a bit of a passion for films, and I've always liked cameras. So, my mum's always supportive, so she'll like, 'Oh, it's fine.' My stepdad kept telling me throughout my two years that I shouldn't do it, I should do an apprenticeship, and my dad was a bit indifferent to it, because at one time in my life, for about a year, I wanted to be a panel beater like my dad, and my dad told me, he very plainly said, 'Don't bother, you won't make enough money', so that put the kibosh on that. My dad didn't really understand what sort of industry it was because he's never been in it, neither has anybody in my family

(early-career, runner)

[My parents] wanted me to study economics in London, somewhere like LSE sort of thing, and I wanted to do film far away from London, so that's where the dynamic came in. I got my way, we can say that much, but they're very supportive now. I think as parents they were just concerned and anxious, because they don't know anything about it

(early career, assistant producer)

I was 15 and I walked into the studio and thought this feels like coming home. I'd

never been in one. I'd watched a lot of TV but that was the point where I thought, right, this is what I want to do

(mature career, company director)

3.6.3 Early career workers' training needs

ECW and employers agreed that the best way to learn new skills is on the job. Skills training, provided by third parties, was considered useful but expensive:

You can't learn in a classroom, you have to go and be thrown into the fire, and then you have to be seeing how someone does their job under intense conditions

(mid-career, managing director)

But until you're on the set it's so hard to prepare for, you need to have proper operational experience doing it, so you sort of learn by doing

(early career, runner)

As budgets have gone down and wages gone up, many smaller companies who want to support training for the upcoming generation are struggling to do so:

I'm making programmes now for budgets that we probably wouldn't have looked at ten years ago, and so everybody wants to help and bring the next generation on for lots of different reasons. But for a lot of production companies, it's can we afford to do it?

(mature career, creative director)

The training situation is particularly acute for freelancers, who are typically on short-term contracts in which there tends to be little training and the expectation that they are already prepared to do the job:

Freelancers generally have to pay for the training themselves, which means they're not earning pay but they lose a day or a week's money because they've gone on a training course, so what would you do? You don't want to just busk it, but you might miss out then and discover that actually you are more confident on camera. Perhaps there are women who don't become shooting PDs because how do you actually get access to the equipment and learn? The people who've got less confidence just might not make that step that they would make with training

(mid-career, company director)

One option is for employers in larger companies to use longer running series to train up staff, and this works well, but this situation is unusual. Small companies rarely have the resources to support external training, and training comes with the risk that workers may leave to earn more money elsewhere, taking their skills with them:

We have somebody who started with us more or less as a runner. She's now a researcher, but she actually was self-taught on camera and editing, which is quite unusual to have those skills. And so we invested in her, we sent her on a week-long camera course, and it cost us several hundred pounds. I wouldn't blame her if she wanted to go to London or something when her contract finishes

(mature career, company director)

Not providing employee training can also result in companies losing their staff. One company owner described losing a member of staff to a company in Scotland that offered training. On balance it is considered that training staff was worth the risk of losing workers, as the more workers each company trains then the greater the local talent pool in the region overall, which again illustrates coopetition within Y&H and the North generally. Company owners frequently highlighted the need for funding for training, arguing that funding, properly monitored, should go directly to companies who can assess needs and immediately put skills into action:

You can pour as much money as you want into training but unless you give that money to the production companies to

deliver the training, they come out of the training places not ready for industry. So I think to give the indies a pot of money that is monitored and that it's run almost as a university course, give it to industry so they can engage in training in industry

(mature career, company director)

Yes, we'd invest in it too, but we can't afford to do it alone because there's nobody training up. The graduates come out of university; they've been taught by people who haven't worked for years or have never [worked in the industry]. I'm not being disrespectful, but they don't know what the latest state of play is. They won't know how to go and make a programme on 20 grand

(mature career, company director)

Paid internships within companies appear to work well for the employer and for the intern. Employers mentioned funding for interns from Screen Yorkshire, the Grierson Trust, and Channel 4. Internships in small companies were particularly successful, as interns were exposed to a wide range of experiences and job roles. Interns regularly went on to full employment within the industry. But more funding for internships was called for, alongside a suggestion that commissioners could include funding to support a young person on the first steps of the career ladder:

I'd argue for [funding for training] to come to the company because you could immediately put those skills into action, you know, by arrangement. There's somebody in our team, I think she'd really benefit from mentoring, she could really rise up

(mature career, company director)

Shadowing was suggested as another potentially useful way of training on the job, where experience can be gained but without the risk of either slowing production down or an individual carrying the responsibility if things going wrong. The industry is described as having a high-pressure culture, and individuals quickly either sink or swim when taking on a new role. Shadowing would be a useful training method to increase diversity, encouraging women who are less likely to take on a role they are not already trained for, and for those who lack initial confidence or previous industry knowledge:

If we want to grow the talent … it's finding those next generation of producers, directors, or production management, or postproduction, or whatever they want to do and allowing them, through funding, to shadow people that are doing those jobs on big productions, and putting them in a kind of win-win scenario where it's like, 'Do you want an extra junior production manager on this? They're paid for and they're coming to work on it for three months.' Then they're going to come out of that with the credit, with the experience, with all the things they need, but that role won't have been on their shoulders, and someone will have actively been allowing them to see how it works on the job, because that's the only way you can learn

(mid-career, managing director)

3.6.4 Mid-career workers' training needs

Mid-career workers face challenges and training needs due to technological change and the emergence of new jobs requiring new skills. The general perception from employees is that training for progression up the career ladder takes place on the job, and there is little requirement for additional training at the mid-level. However, employers identified a severe lack of mid-career workers in the region particularly in editing, production management, and other post-production roles. Moreover, one interviewee described how mid-career workers were held back by a lack of experience on large projects, creating a negative cycle:

You get a network commission, and the commission editors are based in London,

and they'll say 'Well, the editors in the North aren't good enough, you have to edit in London.' And then the reason they're not good enough is because you don't use them, therefore they don't get experience cutting or whatever your big show is

(mature career, company director)

A need for managerial skills training among mid-career and freelancers was also identified in this research. Freelancers often move between companies gaining technical experience and know-how and are gradually put in more senior managerial roles but without training in management and soft skills. Mid-career freelancers discussed the difficulty of accessing training due to cost and time constraints, as well as the need for on-the-job experience to develop skills. One editor described wanting to move from corporate film making to the TV sector, but difficulties in accessing training in the industry's standard software (Avid) became a major hurdle:

I wasn't Avid trained for a start. We didn't do that at Uni. That was a massive hurdle because everything in broadcast, especially at that time, was Avid. As a freelancer, I couldn't even get the training to do it. Avid training costs an absolute fortune and you need an opportunity to work on Avid to be taught how to use Avid, and freelancers are not there to be trained, we are there to do a job. You have to come with the skills

(mid-career, editor)

The need for training to increase diversity at the mid-career level was highlighted, particularly for workers from working class and minority ethnic backgrounds who currently are not being promoted to higher level roles:

It's a very white privileged place. ... and black and Asian people aren't getting on. ... there seems to be a glass ceiling, and no one quite knows why

(mid-career, company director)

Company directors based inside and outside of the region believed that the number of permanent staff would increase further as the skills shortage continues, and this was considered a positive potential shift because it would provide companies and workers with greater stability and sustainability:

They've come as juniors and then we've just grown them within the company, and that's editors, production managers, everything. Producers, directors, we've grown them here and we've had to. In London there are very few [screen industry] companies with forty full-time staff members, but if you look at us and also if you look at [company name], we've got a lot of staff, and that's because we don't have access to a big pool of freelancers, so we build a base of staff that we can rely on and grow them from within

(mid-career, creative director)

I've always been bemused as to why the TV industry has this freelance nature. We're different and proud to be different. I think it was described as being so old-school but cutting-edge. This idea of being employed, and you work here, is quite unusual, but hopefully could be the future

(mid-career, managing director)

3.6.5 Throwing the gauntlet down to commissioners

Employers unanimously agreed that the regional production of high volume, returning series would provide the ideal training ground for ECWs.

Employers unanimously agreed that the regional production of high volume, returning series would provide the ideal training ground for ECWs. Interviewees challenged commissioners to properly commit both to the region and to regional

training by commissioning such shows. Long running and returning shows would tackle the root problems of skills gaps and the retention of talent; they would enable the development of strong teams, provide repeated experience of a range of roles, and give longer term stability and sustainability to companies and workers:

... we have high volume shows that are low budget, and we give loads of people their first opportunity to edit or their first opportunity to produce or production manage on these less risky, lower, smaller budget things ... And you've got the ability to scale up to something that's more impressive and well thought of and bigger budget

(mid-career, managing director)

... either commission a single or give you the series, a series of six half hours or three one hours or something like that, and immediately you can then commit to keeping people on your team ... if it's then recommissioned you've got a good core staff, and even if somebody leaves, you'll still have a volume of people that you can keep and stick new people in and grow them. ... We've had experience of this, because we did six series of one of our first commissions going back to the '90s, and that led to people I can think of who are in the TV industry today

(mature career, company director)

This type of longer-term production vision has increased local talent pools in the past, such as for ITV, and talent has been grown more recently through a small number of longer-term series. Employers describe how, on most productions, there will be someone who has never done the job previously, which is difficult in the short term, but over the long term this means that there is a talent pool in development that will come into maturity in five to ten years:

It's only going to get better, and it has ... the last five years ... every year it gets so much better. And Netflix are making ... more big shows that are being made here; Netflix make The Circle here in Manchester, and when it happens every year it pulls in freelancers from Leeds, Manchester, and Liverpool, and everyone goes to work on it, and then they all come out with that experience

(mid-career, managing director)

A company director discussed their plans to develop a vocational training scheme for local people, based around a returning series, with the goal of developing a diverse and local talent pool. This is regarded as a long-term project that may take decades to realise:

What we're trying to do is basically set up a returning series ... with a vocational training scheme attached, it has actually got the two things connected, so that it can feed itself ... And, from that, we would hope that we will train up new generations of not only the vocational sort of grips and make up and all the rest of it, but writers and directors as well. So, we have got big plans for that, but it will be decades of work

(mid-career, company director)

Alongside greater commitment from commissioners, improved post-production facilities are also needed. One company based outside the region did plan to move the production of a long running series to Leeds, with the specific aim of training local talent. They argued that long running series were a proven training ground. However, the series was eventually made outside the region due to lack of post-production facilities in Leeds.

[The series is] so huge, but it's a very, very good training ground, so it is really a talent incubator as well. And you can see people who've gone through the system of [the series] and ... people go from quite junior ... [to] some of the most experienced and well-regarded people in the industry

(mature career, company director)

The skill gaps and training needs to the screen industry workforce in Y&H and

across the North generally vary depending on who you talk to. Early career workers are proud of the skills that they have but need more connections to the industry, while employers feel that the new graduate recruits need more practical and less theoretical skills. There are clear needs for on-going training in the industry, but the short-term contracts for freelancers limit the cost effectiveness of companies to provide these skills, which means the costs of training for freelancers often fall on the shoulders of the freelancers.

Although the coopetition present in the industry across the region is built on the belief that the industry is stronger and more resilient when additional training is provided to staff, the low budgets and short-term commission project results in a high-pressure atmosphere that requires people to perform rather than to learn on the job; and yet it is on the job training that is most effective in this industry. Commissioners caring about the industry need to reflect and identify whether they wish their screen industry companies to continue to be world-class and continue to be in demand internationally, thereby gaining revenues for the nation through exports; if this is the case then they need to identify effective ways of ensuring training is financially viable and integrated into their commissioning behaviours.

4. POLICY RECOMMENDATIONS

1. Commissioners need to follow-through on their commitments to the region, acknowledging the vast TV audience in the North, and commissioning more regional programmes.

This would have a significant impact on training and retaining of local talent and attracting screen workers to the region. Commissioning returning series to be produced in the Y&H region would provide an ideal training ground for local talent, and enable companies to offer longer-term contracts, creating greater sustainability within companies and enabling workers to secure local accommodation without familial support. Commissioning more returning series would also provide greater confidence to exiled workers wanting to return to the region. Y&H has a shortage of mid-career workers, and this research identifies the potential to attract highly skilled workers to return to the region to fill this gap, but more needs to be done to ensure job security.

2. Support needs to be provided for on-the-job training.

Consistent with earlier reports, our findings corroborate the view that learning on the job and acquiring tacit knowledge of practical skills and networks are essential for screen workers entering the industry, although this type of knowledge can be difficult to access (Ozimek, 2020). Our findings suggest two ways in which tacit knowledge can be acquired by new entrants to the industry: shadowing experienced screen workers, and paid internships. Shadowing would provide time and space for workers who may not have initial confidence to gain on the job experience and develop tacit knowledge without the risk of taking on the responsibility for things if the go wrong. As the screen industries are characterised as a 'sink or swim' environment, shadowing would reduce barriers to entering the industry and support those with capability but lower levels of confidence; this could increase the diversity in the workforce too. Paid internships provide industry experience and enable new entrants to develop essential network connections. Greater provision of on-the-job training would retain regional graduates and provide a route into the industry for local talent who may not have pursued higher education, thereby increasing diversity within the industry and training those most likely to remain in the region over the long term. Support for this training could be provided by commissioners.

3. There needs to be an increase in the capacity of post-production facilities by building new facilities in the region.

The lack of post-production facilities in the region is preventing national companies from expanding into the region. Although post-production facilities were proposed by one large organisation, there has been a lack of development and facilities have not materialised.

4. Stronger links could be fostered between universities and industry to provide undergraduates with a more realistic understanding of career pathways in the industry so that they have greater knowledge the types of

production and jobs in the region.

Placements within companies, and talks given by screen workers at education establishments help to install essential networks that lead graduates into their first jobs and embed them into the region. Stronger links between universities and industry could also result in more spin-out facilities and potentially co-investments that could fill gaps in facilities and skill up graduates ready to work in those facilities.

5. Younger generations could be inspired to work in the industry when they are at school, perhaps through school visits and talks by individuals working in the screen industry.

Greater awareness is needed, both by children and their parents, of the wide range of roles in the industry and of the potential career paths that foster local talent.

6. Improving transport links across the Pennines, from Liverpool to Manchester, Leeds, Sheffield, and York would support the flow of screen workers between companies, and with them their ideas, experiences, and skills.

This would strengthen coopetition across the industry and enable screen workers to remain living and working in the region throughout their careers.

7. There needs to be an acceleration of the change in attitudes in the screen industry towards working women and those with caring responsibilities.

This culture change has been enacted by a small number of female-led companies in the region who characteristically support flexible working conditions, local production, and the minimisation of travelling away from home. We echo Wreyford and Kennedy's (2021) recommendation for better compliance to production company and regulator's obligations to the Equality Act 2010 and for those with caring roles to be included in diversity and inclusivity debates.

8. The increase in consumer-led production via mobile phone recordings and on platforms like YouTube reflect a greater diversity of producers and consumers than that which is apparent in traditional TV and film.

Screen industry organisations should increase their representation of people from the breadth of society, from ethnic minority backgrounds to LGBT2Q+ and beyond. This should be reflected within and across organisations, in their training provision, and include mid and senior career levels.

9. Support needs to be provided for regional IP development.

Currently the region offers excellent production services, but more needs to be done to support the producers, writers, and directors who create original content in the region.

10. Tax relief should be awarded for factual TV production.

Currently tax relief is offered for regional drama production, and this attracts drama production into the region from London and across the UK. Similar tax relief for factual production would attract more factual TV production and with it investment in the regional talent pool.

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