



Creative Media and the Use and Limitations of Official Data Sources – an overview

Official data sources that rely on Standard Industrial and Standard Occupational Classifications are broadly effective for photo imaging and publishing for the purpose of collecting and representing employment and some skills data but less useful for capturing data for the rest of the industry. As noted earlier,

- Key elements of the Creative Media industry sit in broad classifications that include activity outside of Creative Media preventing any discrete and crucial analysis e.g. Interactive Content Design, Content for Computer Games and Facilities.
- Official data sources to a greater or lesser extent systematically exclude the discrete and increasing freelance labour pool required to create and distribute the creative content upon which our digital economy is becoming increasingly reliant.
- In some cases sample sizes are too small to enable discrete analysis of data contained within SIC that do exist, particularly to the 5-digit SIC level.
- Few data can be cut by nation and region

The Creative Media industry and DCMS with Skillset first reviewed data available for this part of the industry from the ONS and other sources in 1999 and concluded that additional data are required to measure as a priority the size, shape and specific skills demand of the Creative Media industry its constituent sectors and large freelance labour pool to a granular and commonly understood sub-sectoral level, using bespoke methodologies to ensure adequate sample sizes,. In some cases equivalent data cannot be generated eg. GVA and GDP and so these measures exclude contributions from elements not served well by SIC eg Interactive Content Design, facilities (excl. post production), content for computer games and freelancers.

In some cases, the SIC and SOC systems simply do not provide the level of detail required, as noted above. In other cases within the SIC system, whilst the system itself provides the level of detail required, sample sized of surveys prevent that underpin the key data sources such as the ABI which measures productivity are in fact too small to offer robust detailed analysis. As well as systematically excluding sole traders, as far as business activity goes, little data are available at 5-digit SIC level and for example production and distribution activity cannot be disaggregated.



Table 1 below provides a full breakdown of employment in the Creative Media industry from Skillset’s primary research compared with estimates from official data sources. This is followed by a detailed comparative analysis.

For more detail on the methodologies developed by Skillset with the Creative Media industry please refer to: www.skillset.org/research.



Table 1 Labour Force Survey and Skillset Creative Media Employment Estimates

LABOUR FORCE SURVEY ¹			SKILLSET ²		
INDUSTRIES			INDUSTRIES		
SIC 2007	Description	Total Employed	Main Sector	Sub-sector	Total Employed
60.2	TV Programming & Broadcasting activities	49,000	Television	Broadcast TV	15,750
59.11/3	TV Programme Production activities	23,000		Cable and Satellite	12,700
59.13/3	TV Programme Distribution activities	n/a		Independent Production	21,700
	Sub-total	72,000		Sub-total	50,150
60.1	Radio Broadcasting	13,000	Radio	Broadcast Radio	19,900
				Independent Production	1,000
	Sub-total	13,000		Sub-total	20,900
59.12	MP, V, and TV Programme Post-Production	3,000	Facilities	Post production	7,450
				Studio and Equipment Hire	5,900
				Outside Broadcast	300
				VFX	6,900
				Special Physical Effects	700
				Manufacture of AV Equipment	2,900
				Processing Labs	300
				Other Services for Film and TV	18,600
	Sub-total	3,000			Sub-total
59.11/1	Motion Picture Production activities	19,000	Film	Film Production ³	11,300
59.13/1	Motion Picture Distribution activities	n/a		Film Distribution	1,200
59.14	Motion Picture Projection activities	15,000		Cinema Exhibition	17,650

¹ONS Labour Force Survey April-June 2009.

² Skillset 2009 Employment Census except for Publishing, Photo Imaging, Creative Occupations outside the industry and where otherwise stated.

³ Secondary analysis of unit lists for 2006 feature film productions (80 minutes or longer and minimum budget of £500K).



LABOUR FORCE SURVEY ¹			SKILLSET ²		
				Moving Picture Archives and Libraries	300
	Sub-total	34,000		Sub-total	30,450
59.11/2	Video production activities	7,000	Other Content Creation	Animation	4,300
59.13/2	Video Distribution activities	n/a		Commercials and Pop Promos	4,100
				Corporate Production	3,950
	Sub-total	7,000		Sub-total	12,350
			Interactive Content Design	Interactive Content Design	34,250
				Sub-total	34,250
			Content For Computer Games	Content and Development	7,000
				Sub-total	7,000
			Additional Available Freelancers		50,000
74.2	Photographic activities		Photo Imaging⁴	Photographic activities	
74.20/1	Portrait Photographic activities	17,000		Portrait Photographic activities	17,000
74.20/2	Other Specialist Photography not Portrait	2,000		Other Specialist Photography not Portrait	2,000
74.20/3	Film processing	3,000		Film processing	3,000
74.20/9	Other Photographic activities; n.e.c.	26,000		Other Photographic activities; n.e.c.	26,000
	Sub-total	48,000		Sub-total	48,000
58.11	Book Publishing	33,400	Publishing⁵	Book Publishing	33,400
58.12	Publishing of Directories & Mailing Lists	3,000		Publishing of Directories & Mailing Lists	3,000
58.13	Publishing of Newspapers	56,000		Publishing of Newspapers	56,000
58.14	Publishing of Journals & Periodicals			Publishing of Journals & Periodicals	
58.14/1	Publishing of Learned Journals	n/a		Publishing of Learned Journals	n/a

⁴ONS LFS April-June 2009.

⁵ Ibid.



LABOUR FORCE SURVEY ¹			SKILLSET ²		
58.14/2	Publishing of Consumer, Business and Professional Journals and Periodicals	41,000		Publishing of Consumer, Business and Professional Journals and Periodicals	41,000
63.91	News Agency activities	7,000		News Agency activities	7,000
63.99	Other information Service activities n.e.c.	9,000		Other information Service activities n.e.c.	9,000
58.19	Other Publishing	32,000		Other Publishing	32,000
	Sub-total	181,400		Sub-total	181,400
	TOTAL	347,900		TOTAL	478,250
OCCUPATIONS OUTSIDE THE CREATIVE MEDIA INDUSTRY			OCCUPATIONS OUTSIDE THE CREATIVE MEDIA INDUSTRY		
SOC 2000	Description	Total employed	SOC 2000	Description	Total employed
3432	Broadcasting Associate Professionals	12,000	3432	Broadcasting Associate Professionals	11,800
5244	TV, Video and Audio Engineers	8,000	5244	TV, Video and Audio Engineers	8,000
3434	Photographers & Audio-Visual equipment operators	23,000	3434	Photographers & Audio-Visual equipment	23,000
3431	Journalists, Newspaper & Periodical Editors	21,000	3431	Journalists, Newspaper & Periodical	21,000
5421	Originators, Compositors & Print Preparers	2,000	5421	Originators, Compositors & Print Preparers	2,000
3421	Graphic Designers	85,000	3421	Graphic Designers	85,000
	TOTAL	130,000		TOTAL	130,000
INDUSTRIES + OCCUPATIONS			INDUSTRIES + OCCUPATIONS		
TOTAL		477,900	TOTAL		608,250

NB: 'n/a' indicates data not available. All LFS data include all people working and not just those of working age.



Table 1 shows employment estimates from the Labour Force Survey (April-June 2009) using SIC 2007 against those from Skillset sourced employment data where there is significant incompatibility, using the Skillset coordinated and industry endorsed classification system. Figures from both sources have been grouped in ways that differ slightly from their 'natural' organisation within the two respective systems in order to enable comparison: in other words, the sectors as defined within SIC are not listed in chronological order, and the broad sector groupings used for Skillset data do not in every case reflect how the sector is usually mapped, defined or presented by Skillset. The sector groupings used here are intended purely to illustrate where definitions are compatible and where they are not, and what is and is not included within each dataset.

Television

The LFS estimate of employment in television is considerably higher than Skillset's (81,000 compared with 50,150). There are a number of likely explanations for this. Analysis of the data at sub sector level shows a close fit between the LFS estimate for 59.11/3 (TV Programme Production Activities) and Skillset's estimate for Independent Production for TV (23,100 against 23,000). The LFS estimate is a little higher as it probably includes some in house production staff employed by broadcasters. The real disparity is between the LFS estimate for SIC 60.2 (TV Programming & Broadcasting Activities) and Skillset's combined estimate for Broadcast TV and Cable and Satellite (49,000 against 28,450). The main reason for this is likely to be the diversification of activities now undertaken by broadcasters, and difference in the modes of classification between the LFS and Skillset's Employment Census. Specifically, the BBC (by far the largest employer in this area) now undertakes activity not only in television broadcasting, but also radio, interactive content design and facilities (eg post production and outside broadcast). In the absence of suitable alternative classifications, it is likely that all or most individuals employed, say by the BBC, who respond to the LFS will be classified within 60.2. By contrast, the BBC provides Skillset with employment returns for the four sectors separately (television, radio, interactive content Design and facilities). Employees and freelancers working in generic roles across the business are apportioned according the relative size of each main area of business. Thus some of the



workforce represented within 60.2 is counted by Skillset's research within the categories of radio, facilities and interactive content design rather than television.

Radio

In contrast to television, Skillset's estimate for radio comes out considerably higher than that of the LFS – 20,900 compared with 13,000. In large part, this is likely to be due to the phenomenon, already noted, of BBC employees across all areas of activity being classified as within 60.2 (TV Programming and Broadcasting Activities) by the LFS, but within the specific area by Skillset.

Facilities

The facilities sector encompasses a wide range of activities that provide support to television, film and related areas. The only of these areas captured by a discrete category within SIC is 59.12 (motion picture, video, and television programme post-production activities). The LFS reports 3,000 people to be employed in that activity, compared with 7,450 recorded by Skillset as working in post production. This will be due in part to the classification by the LFS as some individuals in post production within TV Programming and Broadcasting (60.2), as already noted. Some other individuals classified in other sub sectors of facilities by Skillset (eg Outside Broadcast and VFX), may also be classified by the LFS as within 60.2. However, many, employed in areas such as Studio and Equipment Hire and Other Services for Film and TV, are almost certainly excluded completely from LFS data cut to capture the footprint as they are probably counted within SICs that are 'core' to another SSC. This cohort of people almost certainly accounts for part of the overall discrepancy between the LFS and Skillset data.

Film

The overall estimate of employment in film from the LFS is 34,000, slightly higher than Skillset's figure of 30,450. While Skillset's estimates of exhibition/projection and distribution are slightly higher, the LFS estimate of employment in film production is considerably higher (19,000 compared with 11,300). The likely explanation for this is the classification by LFS of some individuals in film production who are recorded by Skillset in areas such as commercials or animation (see below – Other Content Creation).



Other Content Creation

The sum of these areas as recorded by Skillset comes in higher than the LFS estimate (12,350 compared with 7,000). As noted above, this is probably due to some of those classified here by Skillset being counted within Film Production by the LFS.

Interactive Content Design

Interactive content design accounts for employment of 34,250 people but is not classified as a discrete sector within SIC and therefore does not show up in official data estimates of Skillset's footprint from sources such as the LFS.

Content for Computer Games

Content for computer games accounts for employment of 7,000 people but is not classified as a discrete sector within SIC and therefore does not show up in official data estimates of Skillset's footprint from sources such as the LFS.

Reconciling the Data

As has been noted above, there are some differences between the LFS and Skillset sources in how sectors are classified within and between television, radio, film, other content creation, and post production, but the overall estimates for combined employment in areas covered by SIC fit very closely.

Skillset, January 2010