Camera trainee Lauren Byrne on set © ScreenSkills, photo by Erroll Jones

Annual ScreenSkills Assessment
August 2019

Acknowledgement

Contents

Executive Summary

The Annual ScreenSkills Assessment is one of the three research strands of Skills Forecasting Service 2018-19 (SFS). This strand collates data from wide-ranging sources to provide an in-depth analysis of labour market and skills issues affecting the screen industries. Viewed against the backdrop of the wider UK economy, it considers factors such as: overall employment levels, demographics of the workforce, skills mismatch and workforce development. Significantly, it also highlights variation and inconsistencies between data sources, helping to lay the ground for more meaningful capture and interrogation of relevant data for the screen industries in future research.

Aim of the Annual ScreenSkills Assessment

Establishing an accurate, coherent picture of a labour market is an essential part of tackling any skills issues in that industry. It can help identify potential causes and whether they may be inherent, incidental or extrinsic to an industry's characteristics. The Annual ScreenSkills Assessment aims to move us closer to building such a picture for the UK screen industries' labour market by drawing together existing and new research under a single study – something which has not hitherto been done.

A bank of useful research exists that gives insights into specific screen industry sectors or features, including workforce-related issues, which we attempt to bring together. To build a cohesive picture, this research needs to be reviewed for common trends and potential anomalies. However, varying methodological approaches and definitions across studies mean that this is often not a "like for like" comparison.

To begin to resolve this challenge, the Annual ScreenSkills Assessment 2019 employs a mixed research methodology to underpin findings, consisting of:

- **Desk research**: a review of existing literature relating to labour market and skills issues in UK screen industries;
- **Primary research**: a specially commissioned survey of employers in the UK screen industries; and
- **Secondary research**: an analysis of national data sources (eg Labour Force Survey and Employer Skills Survey), providing information on individuals and businesses.

This approach also seeks to highlight where current research methods may be missing important data that affect how the screen industries are perceived, reported and listened to.

Defining screen industries

ScreenSkills identifies seven distinct yet interrelated sectors as collectively making up the screen industries: animation, children's television, film, games, high-end TV, unscripted TV and VFX. This is coherent with the definition used by the UK Government and the BFI, through the tax reliefs offered to some sectors, and is generally how the industry perceives itself.

However, the Standard Industrial Classification system (SIC), adopted by the Office for National Statistics (ONS), takes a value chain approach to classifying these sectors, giving a different but complementary definition of the screen industries. Fast-changing technologies, practices and markets within the screen industries mean that the SIC system does not accurately represent or account for some screen industry sectors as they are evolving, such as the way animation and VFX cross boundaries with film and TV production.

National data (eg Labour Force Survey and Employer Skills Survey) is an essential component in building the bigger picture of the screen industries labour market, particularly when making comparisons with the wider UK economy, so it must be taken into account. Therefore, for the purposes of the Annual ScreenSkills Assessment, we map the sectors of animation, children's TV, film, games, high-end TV, unscripted TV and VFX that fall within the SIC system against the relevant SIC codes, listed below (figure 1).

Figure 1: SIC code activities

SIC code	SIC title
59.11	Film and TV production
59.12	Film and TV post-production
59.13	Film and TV programme distribution
59.14	Film exhibition
60.20	TV programming and broadcasting
58.21	Publishing of games
62.01/1	Development of games

Source: UK Standard Industrial Classification of Economic Activities (2007), Office for National Statistics.

Key findings

As the findings draw on data from combined sources, many will come as no surprise to those operating in the screen industries. This is, nonetheless, useful in highlighting persistent and ongoing known issues and confirming the value of current investment to tackle them. However, as this bigger picture begins to build, the expectation is that it will reveal trends that are worthy of tracking for further valuable insights and show critical gaps in data to resolve.

State of the screen industry in the UK

To provide context, the evidence shows a thriving industry containing a high proportion of micro-businesses. Businesses in the screen industries have a more international focus than the average across the UK economy and – particularly pertinent at the time of publication[1] of this Annual ScreenSkills Assessment – are more than twice as likely to sell their products into the EU. Geographically, activity remains most concentrated in London, with Scotland and Wales also in the top four nations or regions. The South East has the largest concentration of the English regions outside of London. Statistically, this breaks down as:

- ONS figures indicate a little over 24,000 businesses operating within the screen industries, the majority (70%) having fewer than five employees (compared to 54% of businesses in the wider economy)
- Total turnover for the screen industries is £37.5 billion
  - A small number of businesses (5%) that together make up TV programming and broadcasting[2] (SIC 60.20) account for the largest turnover of £13.4 billion, which is 36% of the total
  - Film and TV production (SIC 59.11) accounts for 70% of the total businesses, generating 33% of turnover
- Nearly a quarter (24%) of screen industry businesses sell products/services internationally, primarily within the EU, compared to just under a tenth (9%) of businesses across the UK economy. A further 15% of businesses in the screen industries sell products/services internationally, primarily outside the EU, almost four times the average across the UK economy (4%)
- The location quotient analysis[3] shows that employment in the UK's screen industries is heavily concentrated in London (LQ = 3.03), followed by Scotland (LQ = 0.94), the South East (LQ = 0.78) and Wales (0.73); the lowest concentrations are in the North East (0.39) and West Midlands (0.36)

Workforce and employment in the screen industries

The total number of people working in the UK screen industries is estimated through national statistics to be 211,000. This includes payroll and self-employed (eg freelance workers[4]). This figure is calculated using ONS data supplemented with data from the Department for Digital, Culture, Media and Sport (DCMS). As the breadth of the games sector is not easily identified within the SIC system, this may be an underestimate.

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[1] At the time of publication, the UK is continuing Brexit negotiations, therefore the UK's future trading terms with EU countries are unknown.

[2] This class includes the activities of creating a complete TV channel programme, from purchasing or commissioning works to self-producing components (eg local news, live reports) or a combination thereof, for broadcast by the producing unit or produced for transmission by a third-party distributor, such as cable companies or satellite television providers.

[3] The location quotient analysis is further explained in the report.

[4] In the national data used, the freelance workforce is contained within, but not the only component of, the category of "self-employed".

National statistics estimate self-employment is almost twice as high in the screen industries as it is in the wider UK economy, at 28% of the total screen workforce. ScreenSkills' Employer Survey 2018 confirms that freelancing is widespread, with a large majority of businesses in all screen industry sectors – the sole exception being film exhibition – working with freelancers. An industry that views itself as largely freelance might be surprised by the figure of 28%. However, this may be a matter of perception due to the widespread practice of engaging freelancers and the higher proportionate use of them in some sectors, such as production where the proportion of freelancers is 50%. Further research is needed to shed light on this.

Beyond needing to quantify the number of freelancers, ScreenSkills is also seeking to better understand wider characteristics and trends within the screen industries' freelance workforce and how they are utilised. This Annual ScreenSkills Assessment takes a first step to capturing experience levels of freelancers using a newly introduced grading structure[5] (entrant, early career, experienced and expert) which offers the potential to track roles and progression in future across freelance, as well as payroll, workers.

Research suggests that those working in the screen industries earn more per week on average (again with the exception of film exhibition) than workers across the UK economy. However, the data for earnings accounts only for payroll employees, leaving the overall picture incomplete.

- Using the SIC definitions the 211,000-strong screen industries workforce breaks down across sectors as:
  - Film and TV production accounts for the largest segment of the workforce (41%)
  - TV programming and broadcasting is the second largest segment (25%)
  - The remainder split as: development and publishing of games combined (14%); film and TV post-production (8%); film exhibition (8%); film and TV programme distribution (4%)
- Of the total screen industries workforce, approximately 28% are estimated to be self-employed
  - Film and TV production has the largest proportion of freelancers (50%), followed by film and TV post-production (39%)
  - The remainder break down as: TV programming and broadcasting (12%); film and TV programme distribution (8%); film exhibition (0%)
- 86% of respondents to the ScreenSkills Employer Survey work with freelancers
  - almost 80% of these use freelancers frequently or very frequently
  - most commonly freelancers fulfil short-term project-based needs
- By sector, the proportion of ScreenSkills Employer Survey respondents working with freelancers is:
  - Animation (100%), unscripted TV (98%), film production (97%), high-end TV (96%); children's TV (96%), VFX (83%), film distribution (75%), games (71%), and film exhibition (47%)
- Respondents are more likely to use freelancers in experienced or expert grades than those in their early career or recent entrants
- For workers on payroll, the average median weekly pay in most screen industry sectors is higher than in the wider UK economy, with the sole exception of film exhibition
  - Median weekly earnings in film and TV programme distribution are highest (£947.20), followed by TV programming and broadcasting (£756.70)
  - Film exhibition is predictably lowest (£179.20) due to the breadth and nature of roles, particularly within cinemas
  - For comparison, the UK national median weekly pay is £448.60
- Equivalent earnings data for self-employed workers in the UK screen industries is not available

Diversity and workforce composition

The UK screen industries continue to face significant inclusion and diversity issues. Extensive desk research shows a strong relationship between workplace diversity and benefits to businesses and workers (such as improved performance, competitiveness, innovation, wellbeing and job satisfaction). With ONS statistics indicating that screen industries fall below the national average in the wider UK economy in terms of demographic composition – overall the screen industries workforce is more male, more white, younger and better off, with fewer people with disabilities – we are missing opportunities.

Comparatively slightly more workers from overseas are employed across the screen industries (12%) than in the wider UK economy (11%), although there are slightly fewer from the EU27 countries (6% in screen against 7% in the wider economy). This hides significant exceptions such as VFX, which is reported in UK Screen Alliance's 2019 research paper as employing one in three workers from the EU.

[5] ScreenSkills' new grading system is detailed in figure 71 of appendix C.

Gender, ethnicity and disability within the screen industries workforce are being monitored to some extent but variables such as caring responsibilities, geographic location, sexual orientation, socio-economic background and religion remain largely unanalysed. The main TV broadcasters are leading the way in monitoring their workforce in more detail (Ofcom, 2018b), but not enough is being done to map wider workforce characteristics across other sectors of the industry, especially among non-permanent staff. Smaller businesses, in particular, may need support in this area.

Half of respondents to the ScreenSkills Employer Survey (excluding sole traders) feel that their workforce is not representative of the UK population, while almost two thirds cite lack of applications from under-represented groups as a key barrier to improving diversity in their workforce. This highlights room for improvement in reaching and helping to change the perceptions of potential applicants from those groups and send the message that the door is open.

Businesses responding to the ScreenSkills Employer Survey who feel that their workforce is reflective of the UK population were asked what actions they take to tackle diversity. Encouragingly, the most common three responses fall in line with contemporary views on best practice in the workplace: flexible working, fairer recruitment practices and transparency. Such practices could make a significant contribution to improving diversity and inclusivity if adopted across the screen industries.

The survey also asked employers how optimistic they feel with regard to their organisation's workforce diversity improving in the next 12 months. Unscripted TV, film and high-end TV are the most optimistic sectors, with around three quarters feeling that their diversity will improve over this period. When split regionally, Yorkshire and Humber employers are most optimistic (perhaps reflecting recent and upcoming investments, such as the Channel 4 relocation), followed by Northern Ireland. Lowest levels of optimism for improved diversity are reported in animation sector-wise and in Wales, geographically.

- The analysis of ONS data suggests that the screen industry sectors combined have:
  - a higher proportion of male workers (62%) than the UK economy (53%)
  - a lower proportion of workers aged 50+ (20%) compared to the UK economy (31%)
  - a higher proportion of workers aged below 40 (57%) compared to the UK economy (46%)
  - a higher proportion of workers with a white ethnic background (90%) than the UK economy (88%)
  - fewer people with disabilities (10%) than the UK economy (14%)
  - comparatively more workers from overseas (6%) compared to the overall UK economy (4%), though slightly fewer workers from the EU27 (6%) than the UK economy (7%)
- Half of respondents to the ScreenSkills Employer Survey think their workforce is not reflective of UK diversity
- The most commonly cited barriers to recruiting a more diverse workforce are: lack of applications from under-represented groups (65%); broader reach needed to advertise jobs (39%); recruitment practice is informal, eg word of mouth (36%)
- 38% of respondents overall think that their workforce is reflective of UK diversity, with the most common actions taken among those to maintain a diverse workforce reported as:
  - Flexible working arrangements
  - Recruitment practices that ensure equal opportunities to diverse candidates
  - Transparency across the organisation
- Respondents from East of England, Northern Ireland, the South East and London were most likely to think that their workforce is representative of the UK population
- 42% of responding businesses do not have a formal monitoring system in place
- 61% of responding businesses think that diversity will improve in the next three years.

Extent of skills mismatch

Skills mismatches – the gaps between the availability of people with the skills needed and the demands of the job market – can have an impact on business performance. We need to know where skills mismatches occur so that we can plan to resolve them. To examine the extent of skills mismatch within the UK screen industries, the Annual ScreenSkills Assessment considers two related components:

- Skills shortages (or Skills Shortage Vacancies, SSVs) – whether employers can find the skills, qualifications and experience they need when recruiting; this signifies external skills mismatch
- Skills gaps – the extent to which employers think that the skills of their existing workforce are suitable; this signifies internal skills mismatch

Skills shortages and gaps have been commonly reported for the UK screen industries in recent years. Over a third of respondents to the ScreenSkills Employer Survey that have recruited over the last 12 months report related difficulties in recruiting that resulted in a moderate to very serious problem for almost all of them. While responding employers from across the screen industries report some recruitment difficulties and gaps, variation between sectors highlights particular recruitment difficulties for VFX, games and animation. Although skills issues appear to be widespread across the country, some of the areas with the highest concentration of industry are also the areas where employers think that recruitment difficulties and gaps are most noticeable, Scotland, London, and South East. Other areas that present skills gaps are Northern Ireland and North West. Most respondents believe competition within the sector to be the main cause. The implications of recruitment difficulties most commonly cited are: increased workload for other staff; difficulties meeting customer service objectives; difficulties meeting quality standards; and delays in developing new products and services. Nearly half of businesses with recruitment difficulties have tried to recruit from overseas as a way to address the issue. The top three skills gaps that employers identified are management skills (44%), leadership skills (44%) and project management skills (40%)

Recruiting at a lower level is reported as the most common response to the issue, alongside increasing levels of training. However, as reported in ScreenSkills 2019 paper, High-end television workforce in 2018, this pragmatic approach can create subsequent gaps further down the chain and bring associated problems: lack of crew confidence and knowledge and extra costs in time and money. More than a third of screen industries employers responding state that their existing staff lack the skills needed to do their jobs.

Job roles affected by shortages are varied, ranging across production, craft and technical grades across all seven screen industry sectors. Accountants, line producers, first assistant directors, series producers, storyboard artists, animators and general coders rank among the most commonly reported shortages.

- 33% of respondents to the ScreenSkills Employer Survey report suffering from recruitment difficulties over the past 12 months, though such difficulties are not evenly distributed across sectors:
  - Employers reporting most difficulty recruiting operate in VFX (58%), games (50%) and animation (48%)
  - Fewest difficulties are reported by employers in film distribution (8%)
  - Although recruitment difficulties were reported across the country, employers thought that skills shortages were most noticeable in Scotland (21%), London (16%) and the South East (11%). These areas also present the highest concentration of industry
  - 46% of employers with recruitment difficulties tried to address them by recruiting from overseas (compared to the UK economy average of 38%)
- Of employers facing recruitment difficulties, the main cause cited is competition from within the sector (59%)
- Of the employers tackling recruitment difficulties, the most common action to try to resolve the issue was to recruit at a lower skill level than they had intended (58%)
- 35% of responding employers think they have skills gaps within their current workforce (including freelancers)
  - Animation employers report the highest level of skills gaps (48%), followed by VFX (42%)
  - Children's TV (23%), film distribution (25%) and exhibition (26%) report the lowest levels of skills gaps
  - Although skills gaps are reported across the country, Scotland is identified as the area where skills gaps are most noticeable (16%), followed by Northern Ireland (10%), North West (10%) and London (9%)
  - The top three skills gaps that employers identified are management skills (44%), leadership skills (44%) and project management skills (40%)
- The most common reasons cited for skills gaps are: recruits are new to the role (65%); the employee's training is only partially complete (60%)
- Respondents mostly believe that the following could help tackle skills gaps:
  - Expansion of traineeships, internships or work-placement programmes (63%), mentoring/buddying schemes (57%), increase in training spend for freelancers (53%)
- Of those who think their workforce is representative of UK diversity, 34% report skills gaps in their workforce
- Of those who think their workforce is not representative of UK diversity, 43% report skills gaps in their workforce

Workforce training and development

Desk research confirms a correlation between workforce training and the improvement of organisational retention, productivity and profitability, and a positive effect on job satisfaction for employees receiving

training. Examining the approach of screen industry businesses to workforce training and development reveals where greater focus, action and support are needed.

More than half of businesses responding to the ScreenSkills Employer Survey have arranged or funded training for staff over the last 12 months. The large majority of those invested in training for payroll staff. Only a third of respondents invested in training for freelancers (with employers in high-end TV, unscripted TV and VFX being most likely to). Insufficient training of freelancers could be problematic in sectors with a high proportion of freelancers in the workforce.

Overall employers were more likely to arrange or fund training for early career and experienced workers than for entrant and expert workers, or apprentices. Larger organisations appear more likely to invest in training than smaller organisations – most likely a reflection of their ability to resource dedicated HR functions.

While lack of financial resource is given as the most common factor in preventing employers from arranging or funding training for the workforce, almost a quarter of employers cite the use of freelancers as the main reason for not investing. Lack of suitable training provision is cited by less than one sixth of respondents, though a tenth feel that lack of local provision is a barrier.

Respondents who had invested in workforce training in the past 12 months report a similar pattern in the types of training used as businesses in the wider UK economy, with most opting for a combination of off- and on-the-job training.

More than two thirds of respondents think that they provide enough training to deal with current skills needs, though there appears to be less confidence about the future, with just over half thinking that they offer enough training to manage future skills needs. Training courses for those already in the workforce, along with on-the-job training such as mentoring or job-shadowing, are cited as the most preferred types of training to meet future needs.

- 60% of respondents to the ScreenSkills Employer Survey invested in training for their workforce in the past 12 months
  - Employers in film exhibition (74%), children's TV (73%) and unscripted TV (72%) most commonly invested
  - Employers in animation (48%) and film production (44%) least commonly invested
- Types of training invested in are similar to those reported in the wider economy
  - 32% off-the-job and on-the-job training (UK economy 35%)
  - 17% on-the-job training only (UK economy 18%)
  - 12% off-the-job training only (UK economy 13%)
- Factors most commonly preventing investment in training are cited as:
  - Little/no money available for training (32%)
  - Work mainly with freelancers for whom they do not provide training (24%)
  - Opinion that workforce is already skilled enough (21%) and not enough time to take part in training (21%)
- 68% of responding employers think they provide enough training to deal with current skills needs, whereas 55% think they provide enough training to manage future skills needs
- Preferred types of training to meet respondents' future skills needs:
  - Training courses for those already in the workforce[6] (78%)
  - On-the-job training, eg mentoring, job shadowing (74%)
  - Technical/vocational training for those new to the workforce (53%)

Conclusions and further research

As anticipated, this extensive review of data – recent and new, national and sector-specific – affirms many known characteristics and challenges that shape the current UK screen industries workforce. These include:

- Growth and a fast-evolving market have increased pressure on the existing workforce, leading to competition for staff and freelancers within sectors and feeding recruitment difficulties
- A high volume of micro-businesses and widespread use of freelancers bring flexibility yet can perpetuate issues such as limited workforce diversity monitoring and lower investment in training
- Stepping up workers too quickly in order to meet increased demand is a short-term fix and could be passing skills-related issues along the chain, potentially exacerbating skills shortages and gaps

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[6] Otherwise known as continuing professional development (CPD).

- Difficulty attracting recruits from under-represented groups and retaining older workers: inconsistent data capture across sources leaves gaps – and some anomalies – in the overall picture and may be misrepresenting the sectors that make up the screen industries.

The Annual ScreenSkills Assessment highlights several areas that require further research, including:

1. **Freelance work in each of the subsectors of the industry:** further research is needed to better understand the working patterns and earnings of freelancers, as well as any challenges they might face. While research of this kind is already undertaken in for instance broadcast TV, future research on freelance work should be undertaken for each of the subsectors of the industry;

2. **Diversity statistics in each of the subsectors of the industry:** further research is needed to provide a better understanding of diversity levels and challenges in each of the subsectors of the industry, and in particular of currently under-represented characteristics such as religion, caring duties, socio-economic background and sexual orientation. This would in turn aid the development of sustainable and subsector-specific solutions to diversity issues in the industry. Research of this kind would greatly benefit from the expansion of more inclusive and consistent diversity monitoring systems across the sector at large;

3. **Hiring versus retention of older workers in the workforce:** further research is needed to better understand whether workers over the age of 50, who are under-represented in the workforce compared with the UK workforce as a whole, are choosing to leave the industry at a certain stage of their career or are failing to be employed. Furthermore, further research is needed to determine what the implications of this are in terms of any loss of skills;

4. **Relationships between diversity levels, skills gaps and skills shortages:** further research is needed to determine whether diversifying the workforce would address skills challenges, and also to better understand if and how the pressures created by the production boom are making it harder to address diversity and inclusivity. Further research is also needed to determine how these relationships manifest themselves in each of the subsectors of the industry. Insights of this kind would greatly aid the development of more subsector-specific solutions to both diversity and skills challenges;

5. **New occupations and migration of labour between the subsectors:** further research is needed to identify new and/or fast-evolving occupations in the sector, as well as the migration of labour between certain subsectors of the industry. Information of this kind could help us anticipate new skills gaps and shortages and guide investment in training and professional development.

1 Introduction

1.1 Aim of the Annual ScreenSkills Assessment

The UK screen industries have experienced significant growth over the past decade (BFI, 2018a). Evidence suggests that both turnover and employment have increased across the subsectors of the industry. The GDP contribution of the sector to the economy[7] grew from £2.5 billion in 2007 to £6.1 billion in 2016: an increase of 140%. Furthermore, our analysis of national data sources suggests that employment across the screen industries increased by 16%: from 182.000 in 2013 to 211.000 in 2017[8].

The industry is also experiencing skills challenges. Establishing an accurate, coherent picture of a labour market is an essential part of tackling any skills issues in the industry. It can help to identify potential causes and whether they may be inherent, incidental or extrinsic to an industry's characteristics. The Annual ScreenSkills Assessment aims to move us closer to building such a picture for the UK screen industries' labour market by drawing together existing and new research under a single study – something which has not hitherto been done.

The Annual Skills Assessment is one of the three research strands of the Skills Forecasting Service 2018-2019 (SFS)[9]. Its aim is to provide an in-depth analysis of the labour market and skills issues affecting the screen industries, covering: overall employment levels, demographics of the workforce, skills mismatch, exploring evidence of skill shortages and skills gap; and workforce development in the sector.

1.2 Defining the UK screen industries

In the Annual ScreenSkills Assessment, the screen industries are defined as consisting of seven distinct, yet inter-related sectors: animation, children's TV, film, games, high-end TV (HETV), unscripted TV and VFX.

This definition of the screen industries mirrors how the sector describes itself and aligns with the definition used by the BFI and the Government, through the tax reliefs offered to parts of the sector. While this is our preferred definition of the screen industries, official data sources make use of the Standard Industrial

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[7] The sector's GDP contribution is measured in terms of gross value added (GVA), which is industry turnover minus the cost of inputs bought from other industries.

[8] See the ScreenSkills Forecasting Analysis (2019b) for a comprehensive analysis of these figures.

[9] See figure 65In the autumn of 2018 we launched the Skills Forecasting Service (SFS) to investigate current and future skills challenges and needs in the screen industries. The service is an integral part of ScreenSkills' strategy and a key delivery objective of the BFI Future Film Skills Action Plan (PDF).

The research we undertake aims to tackle significant gaps in the existing evidence base, as identified by the Skills Audit of the UK Film and Screen Industries (PDF) which was carried out for the British Film Institute (BFI) in 2017 and which has been reinforced by our further consultation with business, industry associations, screen agencies, policymakers and training providers.

The first year of research (2018-19) has been carried out in partnership with the Work Foundation, the advocacy and research organisation which is part of Lancaster University. This research was made up of three work streams:

1. The **Quarterly ScreenSkills Barometer**: provides regular, short-term snapshots on business activity, skills gaps and shortages and training practices across, and is underpinned by a short online survey completed by a rolling panel of around 50 industry experts;
2. The **Annual ScreenSkills Assessment 2018-19**: provides an in-depth analysis of the screen industries' labour market and workforce, diversity and inclusion statistics, skills gaps and shortages experienced by employers in the sector, and training provisions. The ASA is underpinned by a specially commissioned employer survey, which was completed by 418 employers across the industry, and;
3. The **ScreenSkills Forecasting Analysis**: provides a forward-looking analysis of drivers of change and the future of work in the sector. The study is based on a rapid evidence assessment and insights gained from a series of in-depth Delphi Panel interviews with 23 industry experts.

Figure 65 in appendix A for more information about the Skills Forecasting Service.

Classification (SIC codes[10]) system. This approach to classifying activities reflects the traditional value chain elements of production, post-production, distribution and exhibition which remain representative of the film sector's ways of working. Added to these key supply chain elements are the TV programming and broadcast activities[11] and games. Putting the above definition of the screen industries in the context of SIC codes leads us to define the screen industries, for the purposes of official data sources, as being:

Figure 2: Definition of the UK screen industries in SIC codes

SIC code	SIC title
59.11	Film and TV production
59.12	Film and TV post-production
59.13	Film and TV programme distribution
59.14	Film exhibition
60.20	TV programming and broadcasting
58.21	Publishing of games
62.01/1	Development of games

Source: UK Standard Industrial Classification of Economic Activities (2007), Office for National Statistics.

However, there are concerns around the level of accuracy with which existing SIC codes capture the activities of fast-developing sectors as the screen industries. Emerging trends and changes in the value chain – such as the increased involvement of the animation and VFX sectors in film and TV production – are not accurately represented by the current classification system. An additional issue to consider is the relationship between the two different definitions of the screen industries. The animation and VFX sectors can for example be said to operate in both film and TV production (SIC 59.11), film and TV post-production (SIC 59.12) and the development and publishing of games (SIC 58.21 & 62.01/1). Moreover, it should be acknowledged that sectors like children's TV may overlap in terms of definition with other sectors, such as unscripted TV and animation.

When we refer to the screen industries in this report we speak of those areas of animation, children's TV, film, games, high-end TV, unscripted TV and VFX that are covered by the seven SIC codes presented in figure 2 (58.21, 59.11, 59.12, 59.13, 59.14, 60.20, and 60.01/1).

1.3. Methodology overview

A bank of useful research exists that gives insights into specific screen industry sectors or features, including workforce-related issues, which we attempt to bring together. To build a cohesive picture, this research needs to be reviewed for common trends and potential anomalies. However, the use of different methodologies and definitions across studies means that this is often not a like for like comparison. To begin to resolve this challenge, the Annual ScreenSkills Assessment 2018-19 uses a mixed research methodology that consists of:

1. **Desk research:** synthesis of existing literature relating to labour market and skills issues in UK screen;
2. **Primary research:** specifically commissioned employer survey of the sector; and
3. **Secondary research:** analysis of national data sources, providing information on individuals and businesses.

This combination gives us (i) the credibility of using quality-approved, national statistics, (ii) the ability to compare the situation in the screen industries to the overall UK economy and (iii) the level of granularity needed to delve below the level that is attainable in national statistics, using national classification systems. It also allows us to identify where current research methods may be missing important data that affect how the screen industries are perceived, reported and listened to.

Additional information on this methodology and the sample constitution of the ScreenSkills Employer Survey 2019 can be found in the technical report.

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[10] All national data provided by the Office for National Statistics is codified and organised into SIC codes. See figure 66 in appendix A on for more information on SIC codes.

[11] This class includes the activities of creating a complete TV channel programme, from purchasing or commissioning works to self-producing components (eg local news, live reports) or a combination thereof, for broadcast by the producing unit or produced for transmission by a third-party distributor, such as cable companies or satellite television providers.

1.4 Report structure

Chapter 2: assesses the state of the UK screen industries, considering its definition, size, structure and regional distribution;

Chapter 3: discusses the screen industries workforce, exploring overall employment levels and the structure of employment;

Chapter 4: analyses the demographics and socio-economic backgrounds of those working in the sector, alongside wider perceptions of diversity issues impacting the screen industries;

Chapter 5: considers the extent of skills mismatch, including evidence of skills shortages, skills gaps and under-employment;

Chapter 6: workforce training and development, covering the extent to which employers in the screen industries plan and deliver training and development, the nature of any training delivered and the future of training and workforce development; and

Chapter 7: considers strategic priorities and areas for further research.

1.4 Report structure

2 State of the UK screen industries

2.1 Introduction

In this section, we discuss the size of the screen industries in terms of the number of companies, level of turnover, Gross Value Added (GVA)[12] and regional concentration. The size of the sector in relation to the size of the workforce is discussed in chapter 3. For the purpose of this report, the terms companies, businesses, firms and organisations are used interchangeably.

The evidence presented in this chapter shows a thriving industry containing a high proportion of micro-businesses. Businesses in the screen industries have a more international focus than the average across the UK economy and – particularly pertinent at the time of publication[13] of this Annual ScreenSkills Assessment – are more than twice as likely to sell their products into the EU. Geographically, activity remains most concentrated in London, with Scotland and Wales also in the top four nations or regions. The South East has the largest concentration of the English regions outside of London.

2.2 Size of the screen industries

The ONS's Annual Business Survey (ABS) shows that there are just over 24,000 organisations operating in the UK screen industries in 2018. The largest sector by some distance is production, which contains just below 19,000 enterprises, which accounts for approximately 79% of the screen industries. The ABS further indicates that there are just under 3,000 post-production enterprises (12% of the total number of organisations). This data suggests that there are only 236 games companies operating in the UK, which is almost certainly an underestimate.

It is considered that much computer games development activity is embedded in businesses which are engaged in business and domestic software development (SIC 62.01/2) but as these are the "main" activity, the development of video and computer games is understated. Since SIC 62.01/2 encompasses a large number of businesses that have very little in common with the games sector, their inclusion in our model would skew the data and provide an imprecise picture of games. Although we do not adopt this figure in the report, it is worth noting that Ukie, the trade body representing the games industry, estimates that there are approximately 2,280 active companies at present[14] (Ukie, 2019).

The ONS data in figure 3 below shows that total turnover for the screen industries is £37.5 billion. Despite accounting for only 5% of enterprises in the screen industries, TV broadcasting (SIC 60.20) provides the largest turnover of £13.4 billion, or 36% of the total industries' turnover. Conversely, the film and TV production subsector (SIC 59.11) accounts for 33% of turnover (despite having 70% of enterprises), indicating that this sector has a large number of smaller businesses (discussed further in section 2.3 below). Film and TV programme distribution activities (SIC 59.13) accounts for 20% of turnover, despite accounting for only 3% of businesses.

These patterns are repeated when we explore the total value of activities undertaken by each subsector. The total GVA produced by the UK's screen industries is £14.4 billion in 2018, but the majority (46%) is produced by the 5% of businesses in the TV broadcasting and programming sub-sector (SIC 60.20) and 23% by the 3% of businesses in film and TV programme distribution (SIC 59.13). The 79% of businesses in the film and TV production sector (SIC 59.11) produce just less than a fifth (19%) of the screen industries' GVA.

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[12] GVA is the measure of the value of goods and services produced in the sector. It is the value of output (or turnover) minus intermediate consumption (the total value of goods and services used in production).

[13] At the time of publication, the UK is continuing Brexit negotiations, therefore the UK's future trading terms with EU countries are unknown.

[14] Ukie's Games Map is available here.

Figure 3: Size of the UK screen industries

Sector		Number of organisations	Total turnover	Approximate GVA at basic prices (aGVA)
		Number	*£ million*	*£ million*
Film and TV production	59.11	18,872	12,401	2,680
		79%	33%	19%
Film and TV post-production	59.12	2,964	1,851	895
		12%	5%	6%
Film and TV programme distribution	59.13	616	7,369	3,331
		3%	20%	23%
Film exhibition	59.14	253	1,551	605
		1%	4%	4%
Television programming and broadcasting	60.20	1,091	13,434	6,638
		5%	36%	46%
Publishing of games	58.21	236	882	267
		1%	2%	2%
All		**24,032**	**37,488**	**14,416**

Source: Annual Business Survey (2016), Office for National Statistics – released May 2018.

2.3 Size of organisations

While the majority of organisations across the entire UK tend to be small, this is particularly marked within the screen industries (figure 4). 70% of the industry's organisations have fewer than five employees (compared to 54% across the whole economy). However, this is likely to (at least in part) reflect the use of freelance workers within the screen industries (discussed further in the following section) ie the project-based nature of working in the screen industries means that companies often crew up or down according to need. The proportion of larger establishments is similar: 5% of establishments have more than 50 employees in both the screen industries and the UK economy.

Figure 4: Size of organisations by number of employees
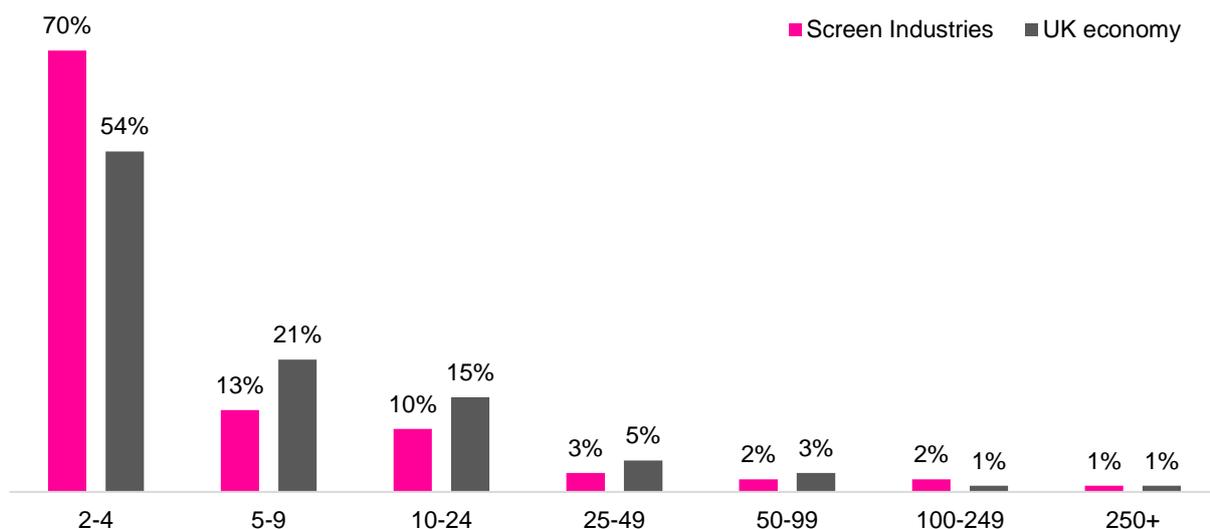
Source: Employer Skills Survey (2017).

2.4 Location of main markets

Establishments in the screen industries are far more likely to sell to national or international markets than businesses in other sectors of the economy (figure 5). 39% of screen industry businesses say their main market (the area into which the establishment's goods and services are mainly sold) is overseas (24% within the EU, 15% outside the EU) compared to 13% of all UK businesses. Conversely, less than one in 10 (8%) say that their main market is local compared to 43% of all UK economy businesses. Businesses in film exhibition (SIC 59.14) are more likely to report their main market is primarily local, reflecting their role in screening films to the local population.

Figure 5: Geographical area in which the establishment's goods/services are primarily sold[15]

	Screen industries	UK economy
	%	%
Locally	8	43
Regionally	6	12
Nationally	23	13
Within the UK	18	17
Internationally (primarily within the EU)	24	9
Internationally (primarily outside the EU)	15	4
Don't know/Not applicable	-	-
Total	**13,410**	**1,895,140**
Unweighted base	552	87,430

Source: Employer Skills Survey (2017).

The screen industries are more dependent on the EU market than businesses across the whole of the UK economy: 54% sell products within the EU (but outside the UK) compared to 25% of businesses in the overall economy (Figure 6 6). However, as highlighted by the report produced by consulting firm Oxera (2017) one of the positive outcomes of the UK leaving the European Union is the opening up of new international markets outside the EU to UK content, if the UK is able to sign free trade agreements with non-EU countries.

Figure 6: Whether sell products at all within the EU (but outside the UK)
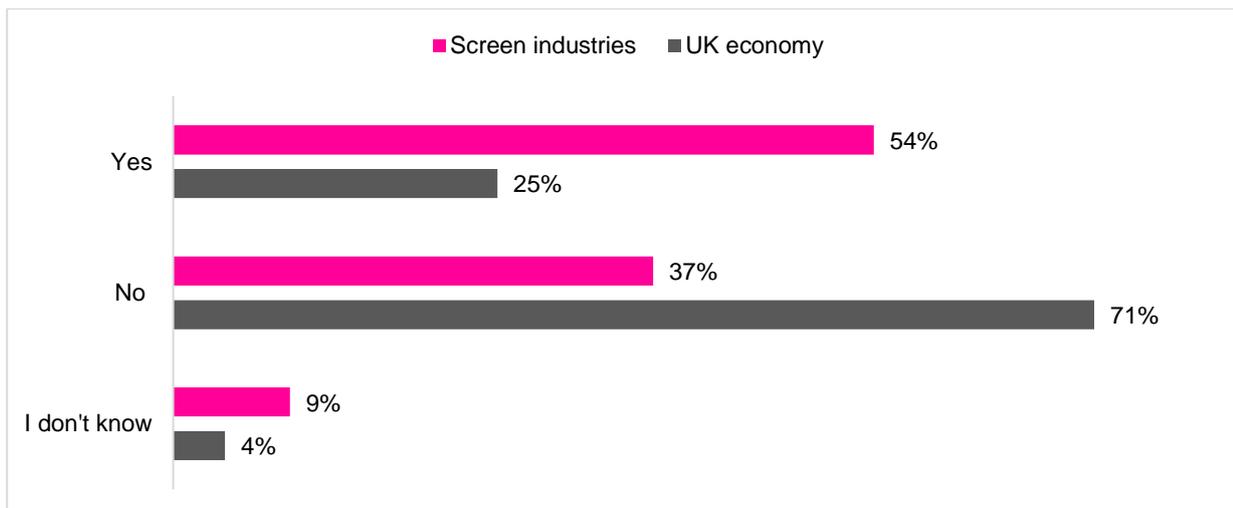
Source: Employer Skills Survey (2017).

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[15] As per the interpretation of nationally, for an English respondent nationally means within England, for a Scottish respondent within Scotland.

2.5 Regional concentration

To better understand the concentration of employment in the sector across the UK nations and regions, we have calculated the location quotient (LQ), a measure of geographical concentration of industries, calculated as the quotient between the local share of jobs in a specific industry, in this case the screen industries, and the local share of national jobs. A value of 1 means that the screen industries' share of jobs in a region is the same as its share of national jobs in the UK. A value greater than 1 means that the screen industries make up a larger share of jobs in the local area than at the national level, indicating concentration.

Data from the Labour Force Survey[16] confirms that employment in the UK's screen industries is heavily concentrated in London (3.03), followed by Scotland (0.94) and South East (0.78) (figure 7).

Figure 7: Region of work
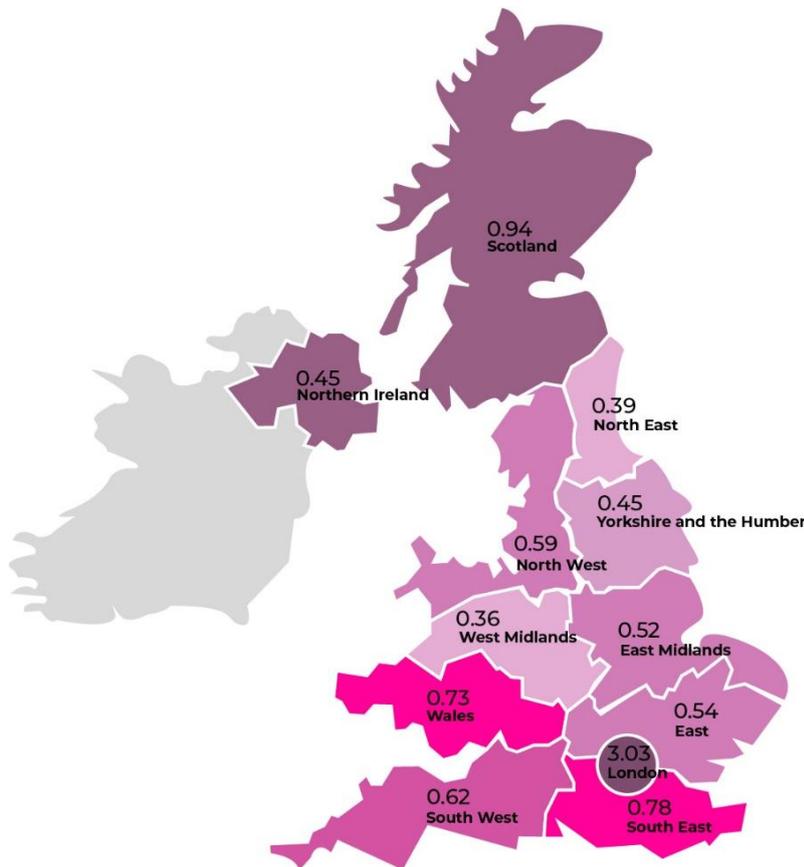
Location quotients for each of the nations/regions of the UK[17]

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[16] For more information on the Labour Force Survey, please see the Technical Report available here.

[17] See figure 67 in appendix B for the corresponding table with workforce figures for each of the nations/regions.

3 Workforce and employment in the screen industries

3.1 Introduction

The UK screen industries are a thriving and fast evolving sector, often placing demands in the workforce to adapt accordingly. However, the lack of reliable official data at the granular subsectoral level makes it challenging to form an accurate picture of workforce and employment figures in the UK screen industries (CAMEo, 2018).

Drawing on the most up-to-date data provided by the 2017 Employer Skills Survey, the 2017 Labour Force Survey and the 2019 ScreenSkills Employer Survey, this chapter provides current estimates on the nature of employment in the UK screen industries. It does this by looking at the overall level and structure of employment in the sector; freelance working, internships and volunteer work; and wages and earnings.

3.2 Overall employment levels

The total number of people working in the UK screen industries is estimated to be 211,000 (figure 8). This includes payroll, self-employed and freelance workers.

The above estimate is informed by data from two national sources. The 2017 Labour Force Survey (LFS) suggests that there are approximately 169,000 workers in the screen industries. However, this is an underestimate of the size of the workforce as the LFS does not allow a separate identification of the games sector. The estimate of 169,000 is based on data from 4 digit SIC codes only and the majority of employment in the games industry is in a 5 digit SIC code[18]. To avoid undercounting the total screen industries workforce, the 2017 LFS data was supplemented with the DCMS Sectors Economic Estimates (2017). This data suggests that the number of workers in the games sector is 30,000. Together, the 2017 LFS and 2017 DCMS statistics estimate that the size of the screen industries workforce is 199,000 people.

Since 2017 DCMS has released new employment estimates for the sector which suggest that there are now not 169,000, but 181,000 workers in UK screen. Combined with the 5-digit SIC code data for games provided by the 2017 DCMS Sectors Economic Estimates[19] this brings the total figure to 211,000 workers.

Figure 8 shows the number of workers in each of the sectors of the screen industries based on the Government's Standard Industrial Classification (SIC) system[20]. The SIC code system is used to divide the UK economy into separate areas of economic activity for the purpose of data gathering and analysis. As presented below, the areas of film and TV production (SIC 59.11) and TV programming and broadcasting (SIC 60.20) together contain 64% of the sector's workforce. This is followed by activities related to the development and publishing games (15%), film and TV post-production (7%), film exhibition (10%) and film and TV programme distribution (4%).

Figure 8: Employment in the screen industries

Sector		n	%
59.11	Film and TV production	86,000	41
59.12	Film and TV post-production	17,000	8
59.13	Film and TV programme distribution	9,000	4
59.14	Film exhibition	17,000	8
60.20	TV programming and broadcasting	52,000	25
58.21 & 62.01/1	Games	30,000	14
Total		**211,000**	**100**

Source: DCMS Sectors Economic Estimates, 2017, Employment release 2018, and Labour Force Survey 2017.

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[18] SIC 62.01/1, ready-made interactive leisure and entertainment software development.

[19] Because the 2017 DCMS Sectors Economic Estimates were collected in 2016, it is likely that the current games workforce is greater than 30,000 workers.

[20] See figure 66 in appendix A on for more information on SIC codes.

3.3 Structure of employment

While a high level of freelancing and self-employment are widely acknowledged within screen industries, attaining data that is consistent between sources – and reflects anecdotal reporting from employers and the workforce – is challenging. For example, the 2017 LFS data shows that the level of self-employment across the screen industries is almost twice that of the average across the UK economy (figure 9). However statistically this is represented as just 28% of those working in the screen industries being self-employed, (compared to 15% for the overall UK workforce).

Figure 9: Employee status of the screen industries workforce

	UK economy	Screen industries
Total	**31,665,000**	**169,000**
Employee status		
Employee	85%	72%
Self-employed	15%	28%

Source: Labour Force Survey (2017). *Note: the statistics in this figure are only representative of the 169,000 workers who were working in production, post-production, distribution and exhibition in the year 2017. It does not represent the 30,000 workers in games captured by the DCMS Sectors Economic Estimates. Although new figures have been released since this data was retrieved, the report refers to the 2017 edition of the LFS to ensure consistency.*

It is important to note that this percentage (28%) does not cover the 30,000 workers in games. Furthermore, the data show that there are significant differences in the level of self-employment between screen industry sectors. Figure 10 below shows the ratio of the self-employed workforce for each of the value chains of the UK screen industry presented by SIC code activities.

Figure 10: Employment status of the screen industries workforce for SIC code activity*

	Total	Employee	Self-employed
59.11 Film and TV production	71,000***	36,000	36,000
	100%	50%	50%
59.12 Film and TV post-production	13,000	8,000	5,000
	100%	61%	39%
59.13 Film and TV programme distribution	9,000	8,000	**
	100%	92%	8%
59.14 Film exhibition	19,000	19,000	**
	100%	100%	**
60.20 TV programming and broadcasting	56,000	49,000	7,000
	100%	88%	12%

Source: Labour Force Survey (2017). *Note: the statistics in this figure are only representative of the 169,000 workers who were working in production, post-production, distribution and exhibition in the year 2017. It does not represent the 30,000 workers in games captured by the DCMS Sectors Economic Estimates. Although new figures have been released since this data was retrieved, the report refers to the 2017 edition of the LFS to ensure consistency. **Note: as LFS results with values below 4,000 cannot be presented, this figure does not contain statistics for the number of self-employed in distribution and exhibition. ***Note: since LFS data needs to be rounded to the nearest 1,000, the total number of employees in film and TV production is 71,000.*

For the area of film and TV production, the SIC data correspond to the findings of the BFI (2018b), which suggest that half of those working in film and video production in 2017 were self-employed. Nonetheless, the LFS data appear to under-represent other areas of UK screen, particularly TV programming and

broadcasting (SIC 60.20). For example, recent Ofcom (2018a) figures suggest that there are 18,000 freelancers across the UK broadcasting industry, nearly three times greater than the national statistics[21].

Such variation in findings raises the question: to what extent do current research methods manage to accurately capture freelancers in UK screen? Further interrogation of methods is required. The findings of the ScreenSkills Employer Survey confirm the view that working with freelancers is prevalent across the UK screen industries. Of the 418 employers who completed the survey, 361 respondents (86%) reported that they work with freelancers (figure 11). This also reinforces the view that the 2017 findings of the LFS may undervalue the ratio of self-employment in the sector[22].

Figure 11: Does your organisation work with freelancers? (n = 418)

■ Yes (n = 361)　　■ No (n = 52)　　■ I don't know (n = 5)

86%

12%

1%
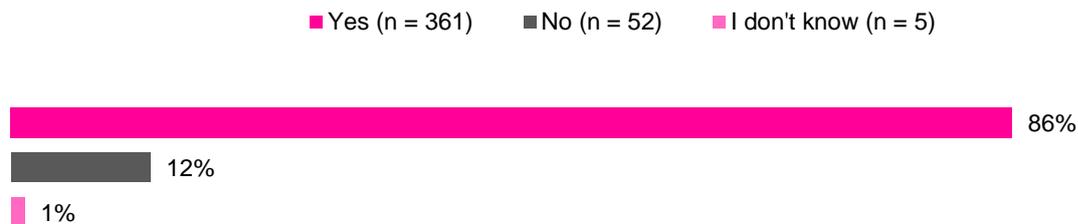
Source: ScreenSkills Employer Survey (2019).

Figure 12 shows the proportion of respondents who work with freelancers represented by sector. The majority of respondents across most of the sectors work with freelancers. As is to be expected, the highest percentages are reported in the areas of animation, film and TV production[23]. Film exhibition presents the lowest percentage of those working with freelancers (47%), though is still almost half of respondents from that sector.

Figure 12: Does your organisation work with freelancers? Subsectors (n = 418)

	Responses	Yes	%
Film	158	119	75
-　　Film production	71	69	97
-　　Film exhibition	62	29	47
-　　Film distribution	12	9	75
High-end TV	80	77	96
Unscripted TV	53	52	98
Children's TV	22	21	96
Animation	29	29	100
VFX	12	10	83
Games	33	24	73
Other	31	29	94

Source: ScreenSkills Employer Survey (2019).

We also asked employers in which grades they hire freelancers. For this question we adopted a more inclusive grading structure that better reflect the screen industry's ways of working[24]:

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[21] It is worth pointing out that these sources are based on different methodologies, so caution is advised when comparing the above-mentioned figures.

[22] Employers were also asked whether they work with interns and volunteers. See figure 74 – figure 78 in appendix C a breakdown by subsector and size of the organisation.

[23] Figure 68 – figure 70 in appendix C show the percentage of respondents who work with freelancers represented by regions and nations, size of the organisation and main SIC code activity. The highest percentage of respondents who work with freelancers are based in London (94%). While this might be an effect of the sample composition of the ScreenSkills Employer Survey, it also resonates with the strong presence of production companies in the capital. The lowest percentage of those working with freelancers are located in the Midlands and the East of England (63%).

[24] See figure 71 in appendix C for a further definition of these grades; this structure will be adopted more widely across ScreenSkills activity from 2019, such as its categorisation and prioritisation of training.

Entrants: those who are entering the industry and left full-time education less than two years ago
Early career: those who are establishing their career and left full-time education more than two years ago
Experienced: those who are progressing in their career and left full-time education more than five years ago
Expert: those who are acknowledged as expert and left full-time education more than 10 years ago

The survey results suggest that employers in the screen industries tend to hire more freelancers for experienced and expert grades than entrant and early career grades[25] (figure 13). Still, a significant number of respondents stated they hire freelancers for entrant and early career grades.

Future research on the freelance workforce is needed to further investigate for which roles employers are likely to hire certain grades of workers, as there are insufficient data to draw conclusions beyond speculative observation.

Figure 13: For which grades do you usually hire freelancers? (n = 361)
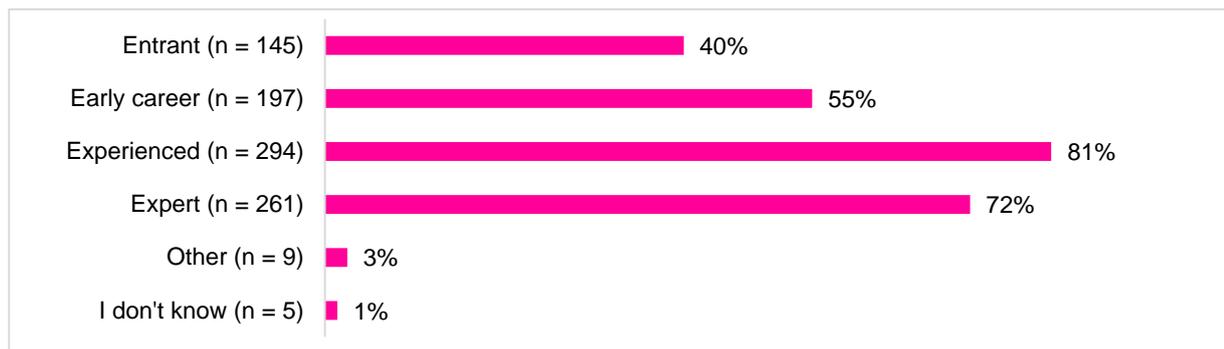
Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

Figure 14 presents the frequency with which surveyed employers work with freelancers. A vast majority of 284 respondents (79%) reported that they frequently or very frequently work with freelancers. By contrast, a small minority of 22 participants (6%) stated they rarely or very rarely work with freelancers[26].

Figure 14: How often does your organisation work with freelancers? (n = 361)
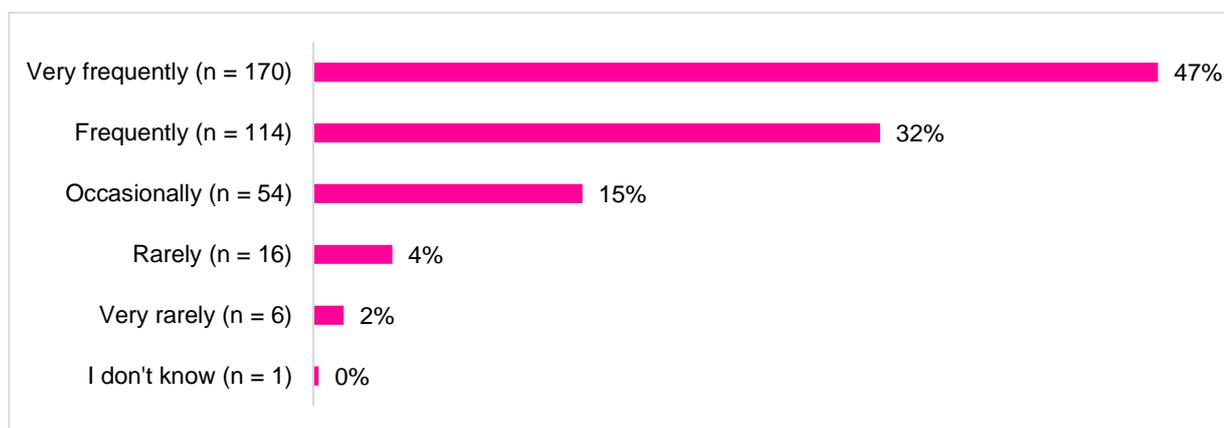
Source: ScreenSkills Employer Survey (2019).

When asked why they tend to use freelancers, three quarters of respondents (272, or 75%) replied that they work on short-term projects, which makes freelancers the best fit for the organisation (figure 15). A further 259 participants (72%) stated that they work with freelancers because of the temporary nature of the work, which strongly resonates with the industries' aforementioned project-based ways of working. 209 respondents (58%) furthermore noted that it allows them to find specific expertise that is difficult to find otherwise. However, a proportionally small number of respondents think that working with freelancers is a cost-effective choice or is quicker than recruiting. Respondents who provided "other" reasons for working

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[25] See figure 72 in appendix C for a breakdown by subsector.

[26] See figure 73 in appendix C for a breakdown by subsector.

with freelancers remarked that the use of freelancers has effectively become the industry-standard way of working.

Figure 15: Why does your organisation work with freelancers? (n = 361)

	n	%
We work on short-term projects and freelancers are the best fit	272	75
We do not need these jobs to be done on a permanent basis	259	72
It allows to find specific expertise that is difficult to find	209	58
It allows us to access talent and skills not available in our own workforce	205	57
It provides greater flexibility	204	57
It is more cost-effective	142	39
It is quicker than recruiting	89	25
Existing workforce does not want an employment contract	57	16
Other	39	11

Source: ScreenSkills Employer Survey (2019).

3.4 Earnings and wages

Data on earnings in the UK screen industries is available from the ONS 2017 Annual Survey of Hours and Earnings (ASHE). Since the ASHE only covers earnings for payroll workers, the data shown in figure 16 below does not take into account the earnings of the self-employed or freelancers, and is therefore not fully representative of the screen industries' overall workforce

The ASHE data provides two measures of earning: mean and median. The mean indicates the average pay in the sector and can be obtained by dividing the total amount of earnings by the total number of payroll workers in the industry. The median measures the threshold or value below which 50% of all payroll earnings fall. In other words, the median indicates what the typical weekly or annual pay in the sector look like. Since mean values can be distorted by relatively few high earning individuals, median values are considered to be more representative when looking at data on earnings in a given sector.

As figure 16 shows, the median weekly pay for the average UK employee in 2017 was £448.60. The average weekly pay was higher in each of the sectors of the screen industries, with the exception of film exhibition activities (SIC 59.14) where the median pay was £179.20. The highest earnings were found in film and TV programme distribution (SIC 59.13) with a median weekly pay of £947.20.

Figure 16: Earnings in the UK screen industries**

Sector		Gross weekly pay		Gross annual pay	
		Median	Mean	Median	Mean
		£	£	£	£
All employees		448.6	538.7	21,992	29,009
Film and TV production	59.11	641.4	745.0	**	40,046
Film and TV post-production	59.12	614.6	770.6	36,134	42,506
Film and TV programme distribution	59.13	947.2	1,326.4	49,454	**
Film exhibition	59.14	179.2	246.8	**	14,316
TV programming and broadcasting	60.20	756.7	856.1	43,900	48,434
Development and publishing of games	58.21	**	944.4	**	**

Source: Annual Survey of Hours and Earnings (2017). *Note: ASHE data covers employees only, not freelancers. **Note: since the ASHE 2018 data is incomplete for post-production and games, this chapter only presents the ASHE 2017 data.*

4 Diversity and workforce composition

4.1 Introduction

Extensive desk research shows a strong relationship between workplace diversity and benefits to businesses and workers. Not only do diverse organisations generally perform better than their less diverse counterparts (McKinsey & Company, 2015), they are also found to be more attractive, competitive and profitable (PwC, 2017; Noland, Moran & Klotchwar, 2016). A recent study on diversity and business performance by McKinsey & Company (2018) for instance, found that organisations with diverse management teams are 33% more likely to generate industry-leading profits[27]. Research also suggests that greater diversity in the workplace boosts the creation of new and innovative ideas (Cletus et al., 2018) and fosters positive professional ties among employees (Ashikali & Groeneveld, 2015). Finally, a diverse workplace is also found to contribute to employee job satisfaction, well-being, job engagement and productivity (Choi & Rainey, 2014; Luu, Rowley & Vo, 2019; Subhash, Jahanvi & Mukesh, 2019).

The screen industries are facing significant inclusion and diversity issues. To track these, the industry needs robust and reliable insights into the sector's workforce composition. However, as suggested by CAMEo's (2018) evidence review of diversity in UK screen indicates, the quality of research and evidence on diversity issues will need to be improved if the sector is to become more diverse. While gender, ethnicity and disability are already being monitored to some extent, variables such as the caring responsibilities and returnships, geographic location, sexual orientation, socio-economic background of the workforce and religion remain largely unanalysed. And while the five main TV broadcasters[28] are leading the way in monitoring the permanent workforce (Ofcom, 2018b and 2018c), not enough is yet being done to map the workforce in other areas and sectors of the industry. An example of good practice is Project Diamond (Diversity Analysis Monitoring Data), an industry-wide diversity monitoring system used by the BBC, Channel 4, Channel 5, ITV and Sky, and supported by Pact and ScreenSkills and implemented by the Creative Diversity Network[29].

This chapter examines the available data on the state of diversity in the UK screen industries by looking at the socio-economic and demographic background of the workforce; barriers to diversity in the sector; perceptions regarding the drivers of diversity; and the actions that the screen industries need to take to promote diversity and inclusivity.

4.2 Demographics of the workforce

Figure 17 presents the demographic composition of the screen industries workforce in 2017. This data suggests that the sector has proportionally speaking:

1. more male workers (62%) than the UK economy (53%);
2. a lower proportion of workers aged 50+ (20%) compared to the UK economy (31%);
3. a higher proportion of workers aged below 40 (57%) compared to the UK economy (46%);
4. more workers with a white ethnic background (90%) than the UK economy (88%);
5. fewer people with disabilities (10%) than the UK economy (14%);
6. proportionally fewer workers from the EU27 (6%) than the UK economy (7%); and
7. comparatively more workers from overseas (6%) compared to the overall UK economy (4%).

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[27] By contrast, McKinsey & Company (2018) also found that organisations with less diverse management teams are 29% less likely to generate above-average profits.

[28] BBC, Sky, ITV, Channel 4 and Channel 5.

[29] More information on Diamond is available here.

Figure 17: Demographic data of the screen industries workforce

	UK economy	Screen industries
	%	%
Sex		
Male	53	62
Female	47	38
Age		
Under 25	12	12
25-29	12	17
30-39	22	28
40-49	23	23
50 and over	31	20
Ethnicity**		
White	88	90
Mixed	1	3
Asian	6	3
Black African, Caribbean, Black British	3	2
Chinese	1	1
All other	2	1
Health/disability		
Have work limiting health problem/disability	14	10
No work limiting health problem/disability	86	89
Nationality		
UK	89	88
EU27	7	6
Rest of the world	4	6
Total	31,664,206	169,000

Source: Labour Force Survey (2017). *Note: the statistics in this figure are only representative of the 169,000 workers who were working in production, post-production, distribution and exhibition in the year 2017. It does not represent the 30,000 workers in games captured by the DCMS Sectors Economic Estimates. Although new figures have been released since this data was retrieved, the report refers to the 2017 edition of the LFS to ensure consistency. **Note: because the percentages are rounded, the figures presented may exceed 100%.*

The national statistics in figure 17 confirm the widespread concerns that the categories "white" and "male" are over-represented in the sector (CAMEo, 2018; ScreenSkills, 2018). In line with research conducted by Directors UK (2018a) and Ofcom (2018b and 2018c), the LFS data shows that women and people from black and Asian minority ethnic backgrounds are significantly under-represented in UK screen. Proportionally speaking, the percentage of female workers is 9% lower than the national average[30]. The percentage of workers from an Asian minority ethnic background is only half that of the national average. Furthermore, UK screen workforce is comparatively younger than the wider UK economy as it employs a third less workers aged 50 and over. This is in line with Ofcom findings: Ofcom's Diversity and Equal Opportunities in Television 2018 reports that 31% of the working age population in the UK is over the age of 50, but only 16% of employees in the screen industries is aged 50-64 years old (Ofcom, 2018b).

The data in Figure 17 17 also suggests UK screen employs proportionally speaking 4% fewer people with a disability than the wider economy. However, under-representation of people with a disability in the sector is likely to be greater than the data shown above. The 2017 LFS only covers "*work-limiting health problems and/or disabilities*". This means that a significant proportion of the workforce who report to have a disability

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[30] Research suggests however that there are significant variations between the subsectors of the industry. Recent findings by UK Screen Alliance (2018) suggest that, on average, only 27% of the VFX workforce is female. Although the organisation highlights that the gender ratio is not the same for all departments in the VFX industry, their findings do emphasise the need for further, subsector specific research into diversity figures.

may fall under the category of people "*without work-limiting health problems and/or disabilities*"[31]. A 2018 House of Commons briefing paper on employment and disability reports that between July-September 2018 7.5 million people (22%) of the working-age population (16-64) reportedly had a disability. It is therefore highly likely that the disability gap is greater than the data in figure 17 suggests. Ofcom (2018b) reports that people with a disability constitute only 6% of the workforce in the TV broadcast sector and that significant gaps in disability figures persist.

Since the data does not allow us to delve deeper into the composition of the workforce at the level of individual subsectors, more research is needed to establish which areas and occupations are most affected by diversity issues. For example, Directors UK (2018a) has already concluded that BAME directors are under-represented in UK television. Ofcom (2018b) moreover reports that while there has been a minor increase in the representation of women at senior levels, BAME representation shows as yet little or no signs of improving. Similar reports are lacking for the animation, film, games sectors.

4.3 Socio-economic background of the workforce

Socio-economic background is not a protected characteristic under the Equality Act 2010[32]. However, it can be considered as an indicator of how inclusive an organisation or industry is. For this reason leading industry organisations such as Ofcom and the BFI have started gathering data on the socio-economic background of the workforce.

Ofcom (2018b) and the Government (Civil Service, 2018) recommend the use of four variables to measure the socio-economic background of the workforce: type of school attended, eligibility for free school meals, highest parental qualification and parental occupation. Based on these variables, Ofcom (2018b) suggests that parental occupation at the age of 14 is the best indicator of one's socio-economic background. Figure 18 below presents data on the occupations of parents for the screen industries workforce as derived from the 2017 LFS[33]. Approximately three out of five screen industries workers (59%) have a parent in one of the three higher-level occupations (managers, directors and senior officials, professional occupations and associate professional and technical occupations) compared to 42% of the overall UK workforce. At the other end of the occupational scale, only 12% of screen industries workers has a parent in process, plant and machine operatives and elementary occupations compared to 22% of all UK workers. These findings show that those employed in the sector are less likely to have a parent who works in manual or low-skilled occupations.

Figure 18: Occupation of parent (social class)

	UK economy	Screen industries
	%	%
Total	**31,664,206**	**169,000**
Occupation of parent		
Managers, directors & senior officials	14	19
Professional occupations	18	28
Associate professional & technical occupations	10	12
Administrative & secretarial occupations	6	6
Skilled trades occupations	24	17
Caring, leisure & other service occupations	3	*
Sales & customer service occupations	4	*
Process, plant & machine operatives	12	6
Elementary occupations	10	6

Source: Labour Force Survey (2017). *Note: as this is a recently added LFS question, no reliable data is available for two of the professional categories "Caring, leisure & other service occupations" and "Sales & customer service occupations".*

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[31] Under the Equality Act 2010 disability is defined as a physical or mental impairment that has a "substantial" and "long-term" negative effect on someone's ability to do normal daily activities.

[32] For more information on the Equality Act 2010, please click here to visit the guidance documents issued by the Government.

[33] Since the LFS data does not capture the workforce of the games sector, the figures displayed here are only representative of the 169,000 people working across production, post-production, exhibition, distribution, and TV programming and broadcasting.

4.4 Perceptions of diversity in the industry

In line with widespread concerns around diversity issues in the sector (CAMEo, 2018; Work Foundation, 2017), the ScreenSkills Employer Survey found that over half (178, or 51%) of surveyed employers think that their workforce is not reflective of the diversity of the UK population (figure 19)[34].

Figure 19: Do you think that your workforce is reflective of diversity in the UK population? (n = 346)

Source: ScreenSkills Employer Survey (2019).

The reasons for lack of diversity in UK screen are complex and, due to the lack of research and reliable diversity data, the exact nature and extent of diversity issues are still not fully understood (CAMEo, 2018). Furthermore, as a meta-analysis by the Chartered Institute of Personnel and Development (CIPD, 2018) identifies, there are many different recurrent barriers to diversity in organisations, such as discrimination resulting from conscious and unconscious biases, and prejudices in the workplace; structural or procedural barriers such as limited opportunities to progress; and biased recruitment practices. Recent research has also indicated that a combination of financial, geographical and attitudinal factors, informal recruitment practices and difficult working conditions all play a role as barriers to diversity in the industry (Work Foundation, 2017; ScreenSkills, 2018).

Figure 20 below presents the barriers to diversity experienced by the employers who participated in the ScreenSkills Employer Survey.

Figure 20: What barriers does your organisation face in recruiting a more diverse workforce? (n = 178)

	n	%
We do not receive many applications from under-represented groups	116	65
We do not have any barriers to recruiting a diverse workforce	75	42
More could be done to advertise jobs in a range of different media to reach diverse applications	69	38
Recruitment practice is carried out informally (eg through word of mouth)	64	36
The quality of applications and applicants from under-represented groups is not at the level we hope to recruit to	51	29
Other	40	23
Building or workplace environment is not accessible	23	13
Lack of training and understanding for hiring staff and managers (eg recruitment and selection training, HR training)	18	10
Production locations are not accessible	15	8
I don't know	4	2

Source: ScreenSkills Employer Survey (2019).

The survey findings confirm the view that diversity issues in the industry are complex and related to a wider series of factors. 65% of those surveyed stated the lack of applications from under-represented groups is a significant barrier to recruiting a more diverse workforce. Further research is needed to shed light on why there is a lack of applicants.

A further 38% of employers stated that jobs could be advertised differently to attract more diverse applications. However, as only 36% of employers viewed informal recruitment practices as a barrier to diversity further research is needed to establish a correlation between these two factors. Finally, 8% of respondents stated that the workplace environment or the production location is not accessible.

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[34] See figure 79 – figure 82 in appendix D for a breakdown by subsector, size of organisation, regions and nations, and main SIC code activity.

4.5 Actions taken to improve diversity[35]

In terms of imbedding diversity and inclusion good practice within the screen industry, TV has been leading the way. Diversity and inclusion have been a top priority in TV, especially in the past three years due to increased attention from Government after the publication of a 2016 parliamentary report Diversity in Broadcast[36] (House of Commons, 2016) and subsequent Ofcom report in 2017 (Ofcom, 2017). The main broadcasters BBC[37], Channel 4[38], Channel 5[39], ITV[40], and Sky[41] have clear diversity policy statements in place, have formal diversity monitoring systems in place, and set specific targets to increase representation of diverse and minority groups which they report on annually.

Within film, the British Film Institute (BFI), the British Academy for Film and Television Awards (BAFTA) and British Independent Film Awards (BIFA) are breaking new ground in diversity and inclusion. In 2017 in the wake of sexual harassment allegations in the media and the call for gender equality, the BFI took action and commissioned an initiative to address bullying and harassment across the film, television and games industries. The end result was the publishing of a new set of principles and guidance for tackling and preventing bullying and harassment in the screen industries developed by the BFI in partnership with BAFTA and in consultation with organisations including guilds, unions, industry member bodies and key agencies as well as employees and freelancers across all roles[42] (BFI & BAFTA, 2017).

The BFI has wider industry impact and promote diversity good practice through BFI Diversity Standards[43]. The Standards have been adopted by Film4 and BBC Films, meaning it is a requirement for the majority of public funding for film in the UK. BAFTA has also incorporated the BFI Diversity Standards, making it an eligibility requirement for the BAFTA Film Awards categories for Outstanding British Film and Outstanding Debut by a British Writer, Director or Producer[44] (BAFTA, 2018). The British Independent Film Awards (BIFA, 2018a) are piloting the Standards in the Best British Independent Film category, with a view to introducing a formal rule change in 2019[45]. BIFA have also pioneered a new diversity initiative: in 2018 BIFA became the first film awards body in the UK create compulsory unconscious bias training for every BIFA voter taking part in the 2018 nominations and awards process[46] (BIFA, 2018b).

Within VFX, many VFX companies, educational establishments and industry organisations collaborate together to raise awareness, create initiatives, produce events, and champion diversity and inclusion.

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[35] For further advice and information, please see ScreenSkills' guide to diversity and inclusivity monitoring available here. This resource includes useful research findings and guidance to help you improve inclusivity and diversity in your organisation.

[36] The full 2016 parliamentary report is available here.

[37] BBC's Diversity and Inclusion Strategy 2016-20 is available here.

[38] Channel 4's 360° Diversity Charter is available here.

[39] Channel 5's Diversity and Inclusion Strategy is available here.

[40] ITV's Corporate Responsibility Summary Report 2017 is available here.

[41] Sky's diversity policy statement is available here.

[42] The principles were commissioned by the BFI, working in partnership with BAFTA, BBC Films, BECTU Sector of Prospect, British Film Commission, British Society of Cinematographers, Creative England, Creative Scotland, Directors UK, the Edinburgh International Television Festival, Equity, Film and TV Charity, Ffilm Cymru Wales, Film4, Film London, Independent Cinema Office, Into Film, the Motion Picture Association, Northern Ireland Screen, Pact, The Production Guild, ScreenSkills, Sheffield Doc/Fest, UK Interactive Entertainment, UK Screen Alliance, Women in Film & TV, and Writers' Guild of Great Britain together with Challenge Consultants (specialists in equality, diversity and inclusion training and policy development). The principles and guidance for tackling and preventing bullying and harassment are available here.

[43] More information on BFI Diversity Standards is available here.

[44] More information on BAFTA's new diversity requirement to film awards is available here.

[45] More information on the BIFA Standards is available here.

[46] More information on the programme of unconscious bias training is available here.

ACCESS:VFX (2018) is a cross-company initiative to promote diversity and inclusion and bring about change in the VFX industry[47].

The ScreenSkills Employer Survey asked employers what actions they take to maintain a diverse workforce (figure 21). The majority of employers who reported that their workforce is reflective of UK diversity stated that they offer flexible working arrangements (73%), review and revise recruitment and selection practices to assure equal opportunity (68%) and take actions to promote diversity across the organisation (66%).

Figure 21: What actions does your organisation take to maintain a diverse workforce? (n = 132)

	n	%
Offer flexible working arrangements	96	73
Review and revise recruitment and selection practices to ensure equal opportunity to diverse candidates	90	68
Promote transparency across the organisation	87	66
Introduce measures to demonstrate fairness in performance evaluations and promotions	62	47
Introduce measures to reduce gender, disability and ethnicity pay gaps and disparities	57	43
Offer diversity and inclusion training to different workforce groups, such as entrant, early career, experienced and expert staff	53	40
Invest in career development programmes to promote diverse leadership	48	36
Set specific diversity and inclusion objectives or targets	39	30
Invest in return-to-work schemes	35	27
Monitor and annually publish diversity data in relation to diversity objectives or targets	24	18
Other	13	10
I don't know	11	8

Source: ScreenSkills Employer Survey (2019).

The above actions taken by employers are in line with contemporary views on best practice in the workplace and could make a significant contribution to improving diversity and inclusivity across UK screen. In this context transparency is key to the promotion of diversity and inclusivity (The McGregor-Smith Review, 2015). For this reason it is important that employers both monitor and report data on their workforce composition and diversity targets. As research by Ofcom (2018b and 2018c) shows, the collection of diversity data informs action to improve the representation of underrepresented groups in the industry and also offers vital insight into those areas of the value chain where diversity has to be improved.

The ScreenSkills Employer Survey found that only a small majority of 52% of employers responding (excluding sole-traders) claim to have a formal diversity monitoring system in place (figure 22)[48].

Figure 22: Do you have a formal diversity monitoring system in place? (n = 346)

Yes (n = 181) — 52%
No (n = 144) — 42%
I don't know (n = 22) — 6%

Source: ScreenSkills Employer Survey (2019).

The findings suggest that there are significant variations between the different sectors of the industry (figure 23). It appears that surveyed employers in VFX (17%) and games (29%) are significantly less likely to have a formal diversity monitoring system in place than employers in film production (66%), unscripted TV (62%), high-end TV (60%), children's TV (60%), and film exhibition (57%).

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[47] More information about ACCESS:VFX can be found here.

[48] See figure 83 and figure 84 in appendix D for a breakdown of regions and nations, and main SIC code activity.

Figure 23: Do you have a formal diversity monitoring system in place? (n = 346)

	Responses	Yes	%
Film	116	65	56
- Film production	38	25	66
- Film exhibition	60	34	57
- Film distribution	12	2	17
High-end TV	70	42	60
Unscripted TV	45	28	62
Children's TV	20	12	60
Animation	26	10	39
VFX	12	2	17
Games	31	9	29
Other	26	12	46

Source: ScreenSkills Employer Survey (2019).

The results furthermore suggest that there appears to be a relationship between the size of the organisation and whether or not employers have a formal monitoring system in place (figure 24). The results indicate that large organisations with more than 250 employees are twice as likely to have a diversity monitoring system in place than smaller organisations with 1-4. They are also significantly more likely to have a diversity monitoring system in place than other organisations in the sample. A possible explanation for this is that large organisations have a more embedded HR structure and more resources at their disposal to put such systems in place. Furthermore, these results may at least in part be due to increased emphasis (and in the case of the gender pay gap, a legal requirement) on larger organisation to publish data on diversity.

Figure 24: Do you have a formal diversity monitoring system in place? (n = 346)

	Responses	Yes	%
Not specified	11	6	55
1 – 4 employees	92	37	40
5 – 49 employees	172	85	49
50 – 249 employees	45	30	67
250+ employees	27	21	78

Source: ScreenSkills Employer Survey (2019). *Note: since sole traders do not have employees on their payroll, they were excluded from this question in the survey.*

4.6 Perceptions about the future of diversity

The ScreenSkills Employer Survey asked employers how they think diversity levels in their organisation will change in the next three years (figure 25)[49]. The vast majority of surveyed employers (61%) appear to be optimistic and confident that diversity will improve. Only a small minority of employers (3%) thought that diversity levels in their organisation would get worse.

Figure 25: How do you think diversity in your organisation will change in the next three years? (n = 418)
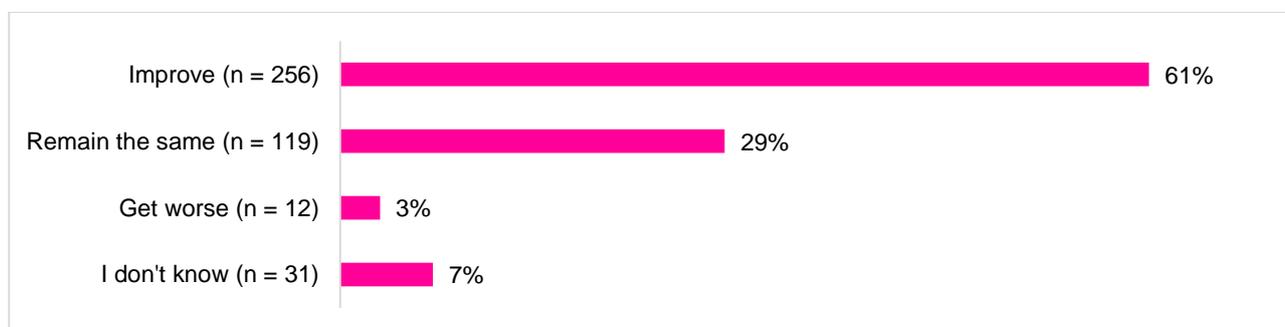
Source: ScreenSkills Employer Survey (2019).

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[49] See figure 85 and figure 86 in appendix D for a breakdown of the size of the organisation and main SIC code activity. Also see figure 104 – figure 107 in appendix G for a breakdown of perceptions on disparities between London/South East and the rest of the UK regions and nations.

The survey furthermore found that employers in unscripted TV (42, or 79%), film production (54, 76%) and high-end TV (58, 73%) were proportionally more optimistic about the future of diversity in their organisation than their colleagues in other sectors (Figure 26). Although the findings are not likely to be representative, in these areas, only 42% and 38% of employers in film distribution and animation respectively think that diversity in their organisation will improve.

Figure 26: Do you think that diversity in your organisation will improve in the next three years? Subsectors (n = 418)

	Responses	Yes	%
Film	158	95	60
- Film production	71	54	76
- Film exhibition	62	31	50
- Film distribution	12	5	42
High-end TV	80	58	73
Unscripted TV	53	42	79
Children's TV	22	13	59
Animation	29	11	38
VFX	12	7	58
Games	33	18	55
Other	31	12	39

Source: ScreenSkills Employer Survey (2019).

The findings show that employers in Yorkshire & Humber were most optimistic, with 81% expecting that diversity levels in their organisation would improve in future (Figure 27).

Figure 27: Do you think that diversity in your organisation will improve in the next three years? Regions and nations (n = 418)

	Responses	Yes	%
East of England	5	2	40
East Midlands	8	4	50
West Midlands	14	10	71
London	164	109	67
North East	12	8	67
North West	29	17	59
South East	38	21	55
South West	36	17	47
Yorkshire & Humber	21	17	81
Northern Ireland	24	17	71
Scotland	42	24	57
Wales	22	7	32
Outside the UK	3	3	100

Source: ScreenSkills Employer Survey (2019).

This is likely to be related to recent and upcoming investments in the area, such as Channel 4's decision to open a headquarters in the region. Employers in Wales appear to be the least optimistic about the future of diversity, with only 32% reporting that diversity levels in their organisation will improve.

5 Extent of skills mismatch

5.1 Introduction

The issue of skills mismatch[50] is one that has been explored at some length over a considerable period of time (Winterbotham et al, 2018). This research shows that while skills issues affects a minority of businesses in the UK (with 6% suffering from skills shortage vacancies and 13% reporting skills gaps in their workforce), where these skills mismatches do exist, they have a considerable impact on the ability of the business to perform. Skill shortages may cause increased workloads for other staff; loss of business or orders to competitors; delays developing new products or services; and difficulties introducing new working practices. Skills gaps, where persistent, can hinder an employer's ability to function to its full potential in terms of productivity and profitability.

Reports of the screen industries facing a range of skills issues, both skills shortages (where employers are finding vacancies hard to fill) as well as skills gaps (shortfalls in the skills of the existing workforce) have been common in recent years. Findings from recent reports highlight that skills issues are found across the subsectors of the screen industries (ScreenSkills, 2019a and 2017; Work Foundation, 2017). This section examines the extent of skills mismatch in the screen industries sector, looking at:

1. the existence and extent of **skill shortages** (called Skills Shortage Vacancies, SSVs). This is a measure of the external skills mismatch, being an indication of whether employers can find the skills, qualifications and experiences that they need when trying to recruit to vacancies;

2. the existence of **skills gaps**. This is a measure of internal skills mismatch, being the extent to which employers think that the skills of their current workforce are suitable or deficient.

5.2 Skills shortages

5.2.1 Extent of recruitment difficulties

Engagement with the recruitment market is not always a frequent occurrence for employers. Less than a fifth of employers (17%) in the screen industries had not tried to recruit anyone at all in the last 12 months (Figure 28)[51].

Figure 28: Has your organisation recruited anyone (including freelancers) in the last 12 months? (n = 418)
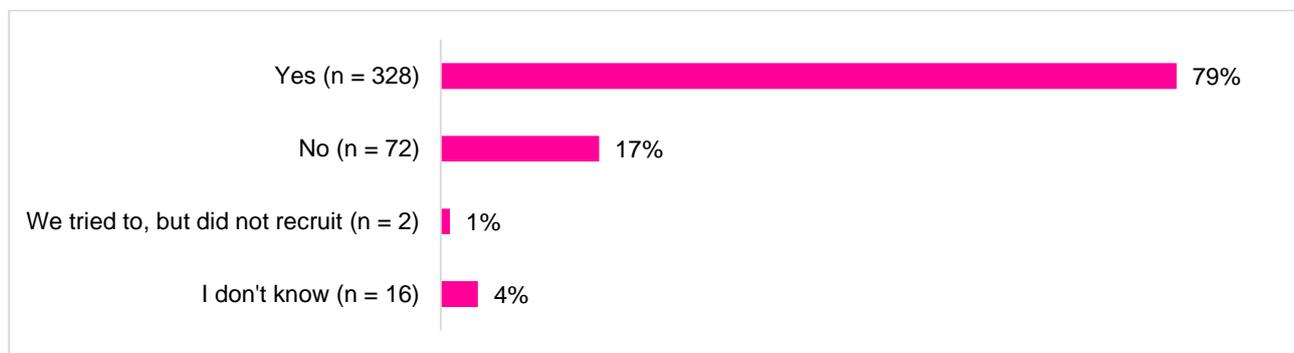
Source: ScreenSkills Employer Survey (2019).

These "recruiting" employers were then asked whether they had found it difficult to recruit for any job roles (figure 29). In total, a third of employers (33%) in the screen industries reported recruitment difficulties[52] (figure 30).

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[50] We define skills mismatch as the gap between the availability of people with the skills needed and the demands of the job market.

[51] See figure 87 – figure 90 in appendix E for a breakdown by subsector, size of the organisation, regions and nations, and main SIC code activity.

[52] See figure 91 – figure 93 in appendix E for a breakdown by subsector, size of the organisation and main SIC code activity.

Figure 29: In the last 12 months, was it difficult to recruit for any particular roles? (n = 329)

Yes (n = 138) — 42%

No (n = 176) — 54%

I don't know (n = 15) — 5%

Source: ScreenSkills Employer Survey (2019).

These recruitment difficulties are not evenly distributed across the industry. Businesses who had found it difficult to recruit are particularly those operating in the VFX sector (58% of employers), the games sector (49%) and the animation sector (48%), where around half of those recruiting experienced difficulties filling vacancies[53] (figure 30); the latter resonating with recent research by Animation UK (2018), which suggests two thirds of businesses experience skills shortages.

Figure 30: Existence of recruitment difficulties (including freelancers) in the last 12 months Subsector (n = 418)

	Did not try to recruit	No recruitment difficulties	Recruitment difficulties	Don't know
	%	%	%	%
All	17	42	33	8
Film Production	28	37	32	3
Film Exhibition	16	50	27	6
Film Distribution	17	67	8	8
High-end TV	15	43	31	11
Unscripted TV	6	58	34	2
Children's TV	9	43	38	10
Animation	24	28	48	0
VFX	0	33	58	8
Games	18	30	49	3
Other	19	32	23	26

Source: ScreenSkills Employer Survey (2019).

The survey data suggests that the issue of recruitment difficulties is more common in larger companies, although evidence (Work Foundation, 2017) notes that those making smaller budget films were also facing wide-ranging recruitment difficulties and commented that they were missing out on top talent to big productions that could afford to pay more. There is also a relationship between the existence of skill gaps and recruitment difficulties. 63% of those business who had skills gaps had also found difficulties in recruiting, while only 29% of those who did not have skill gaps had faced recruitment difficulties. Furthermore, the survey found that recruitment difficulties are present across all UK regions and nations (figure 31).

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[53] See figure 94 in appendix E for a breakdown by main SIC code activity.

Figure 31: In the last 12 months, was it difficult to recruit for any particular role? Regions and nations (n = 329)

	Responses	Yes	%
East of England	4	2	50
East Midlands	7	3	43
West Midlands	8	4	50
London	137	58	42
North East	7	4	57
North West	24	10	42
South East	26	14	54
South West	27	8	30
Yorkshire & Humber	17	7	41
Northern Ireland	22	8	36
Scotland	35	15	43
Wales	13	4	31
Outside the UK	2	1	50

Source: ScreenSkills Employer Survey (2019).

When asked to identify where recruitment difficulties were most noticeably (figure 32), most businesses mentioned Scotland (21%), London (16%) and the South East (11%); albeit this is likely to affect both demand-side (scale of activity) and supply-side (availability of talent) factors.

This pattern is in line with the pattern found in the regional location quotient analysis discussed in section 2.5 suggesting that where employment in the screen industries is relatively higher, then recruitment difficulties are also more likely to be higher.

Figure 32: Areas where recruitment difficulties are most noticeable (n = 138)
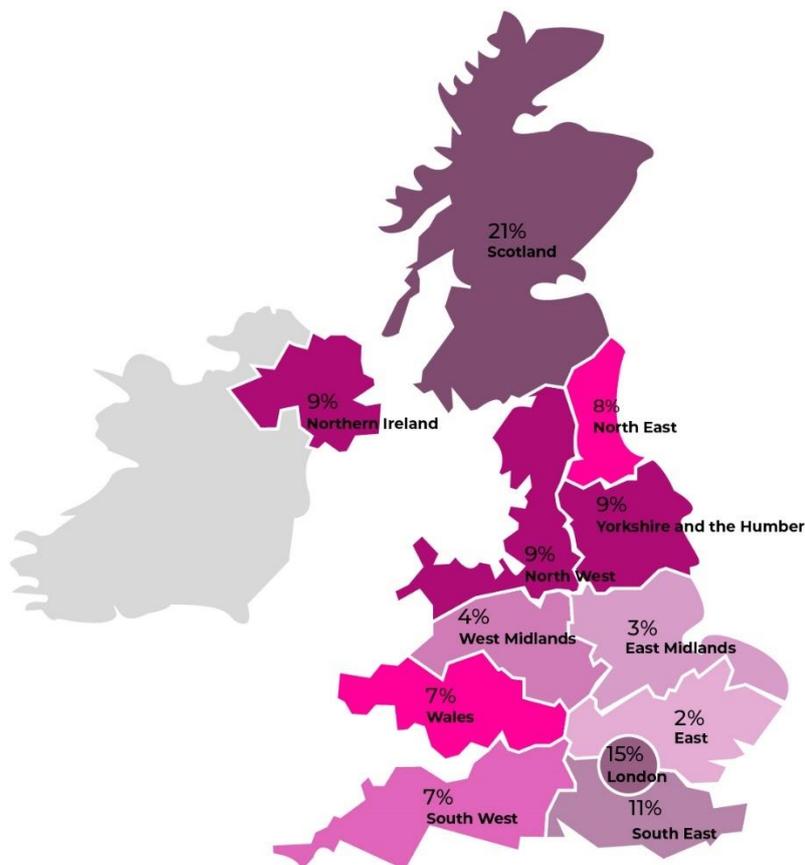
% of employers reporting in which of the nations/regions recruitment difficulties are most noticeable

Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

5.2.2 Job roles affected by recruitment difficulties

Figure 33 shows the job titles of the staff that were identified by participants as hard-to-fill.

In film, the most common areas of shortages relate to production, development, technical as well as exhibition roles, including production accountants, script supervisors, electricians, focus pullers and projectionists. In line with previous research (ScreenSkills, 2019a), the high-end TV sector presents shortages in production at various levels and grades eg line producers, production coordinators, directors, first assistant directors, location managers.

A range of roles have been identified as difficult to recruit for in the animation sector, including storyboard artists, animators, art directors, animation designers and lead 2D animators. Accountants and line producers are the most common shortages in children's TV, whereas in unscripted TV the most critical roles are editors, series producers, accountants and production coordinators.

The games sector presents shortages in programming, art direction and animation. In VFX, hard-to-fill roles mentioned by survey respondents were production accountant, FX technical director, pipeline technical director, FX artist, lead digital matte painter, senior Houdini generalist.

Figure 33: Job roles difficult to recruit for (n = 123)

Film	High-end TV	Animation	Unscripted TV
Accountant (6)	Line producer (10)	Storyboard artist (4)	Editor (5)
Script supervisor (3)	Production coordinator (7)	Animator (4)	Series producer (4)
First assistant director (3)	Director (6)	Art director (2)	Production accountant (4)
Editor (3)	First assistant director (6)	Animation designer (2)	Production coordinator (4)
First assistant camera (3)	Accountant (6)	Lead 2D animator (2)	Edit producer (4)
Electrician (3)	Producer (6)	Rigger (2)	Executive producer (3)
Focus puller (3)	Location manager (4)	Art worker (1)	Archive researcher (2)
Grip (3)	Production manager (4)	Concept artist (1)	Celebrity booker (2)
Art director (2)	Executive producer (2)	Environment artist (1)	Development specialist (2)
Sound re-recorder mixer (2)	Production designer (2)	Scene prep/layout artist (1)	Development producer (2)
Projectionist (2)	Development producer (2)	2D animator (1)	Director (2)
Location manager (2)	Script supervisor (2)	2D artist (1)	Producer director (2)
Gaffer (2)	Writer (2)	2D character rigger (1)	Assistant production accountant (2)
Composer (1)	Second assistant director (2)	2D designer (1)	Location manager (2)
Location sound recordist (1)	Production executive (2)	Animation editor (1)	Production manager (2)
Mixer (1)	Production runner (2)	Animation rigger (1)	Automation director (1)
Construction manager (1)	Production secretary (2)	Junior 2D animator (1)	Casting producer (1)
Production designer (1)	Editor (2)	Director (1)	Series director (1)
Prop master (1)	Art director (1)	Series producer (1)	Broadcast project engineer (1)
Development producer (1)	Costume designer (1)	Production assistant (1)	Broadcast technician (1)
Front house manager (1)	Makeup artist (1)	Production coordinator (1)	Drama producer (1)
Festival assistant (1)	Makeup designer (1)	Editor (1)	Public address engineer (1)
Festival consultant (1)	Prop master (1)	Background designer (1)	First assistant director (1)
Ticket collector (1)	Development executive (1)	3D generalist (1)	Line producer (1)
BSL interpreter (1)	Researcher (1)	Hair and fair TD (1)	Post-production assistant (1)
Cinema manager (1)	Senior producer (1)	Houdini artist (1)	Camera operator (1)
Head of film and audience development (1)	Mechanical CAD engineer (1)		Technical supervisor (1)
Operations manager (1)	Flame online editor (1)		
Support engineer (1)	Junior flame artist (1)		
Venue assistant manager (1)	Senior colourist (1)		
Boom operator (1)	Showrunner (1)		
Unit manager (1)	Assistant location manager (1)		
Second assistant director (1)	Financial controller (1)		
Assistant accountant (1)	Assistant editor (1)		
Bookkeeper (1)	Offline editor (1)		
Operations director (1)	SFX technician (1)		
Producer (1)	Senior technician (1)		
Production assistant (1)	Visual effects supervisor (1)		
Production coordinator (1)	VFX producer (1)		
Production manager (1)	Marketing manager (1)		
Film programmer (1)	Electronics engineer (1)		
Catalogue sales consultant (1)	Grip (1)		

	VFX	Children's TV	Games
Director of marketing (1)	Production accountant (1)	Accountant (2)	General programmer (4)
Fundraising executive (1)	FX technical director (1)	Line producer (2)	Senior programmer (3)
Marketing and communications manager (1)	Pipeline TD (1)	Producer (1)	Art director (2)
Marketing assistant (1)	FX artist (1)	Offline editor (1)	Animator (2)
Senior sales executive (1)	Lead digital matte painter (1)	Assistant accountant (1)	Producer (2)
Driving coordinator (1)	Senior Houdini generalist (1)	Floor runner (1)	AI programmer (2)
Lighting engineer (1)		Production coordinator (1)	Engineer (2)
Rigger (1)		Assistant director (1)	Environment artist (2)
Technical manager (1)		Editor (1)	VFX artist (2)
		Interactive edit assistant (1)	Technical artist (2)
		Post production supervisor (1)	Animator supervisor (1)
		Production secretary (1)	Designer (1)
		Front-end developer (1)	Senior designer (1)
		Camera trainee (1)	UI artist (1)
			UX designer (1)
			Pipeline engineer (1)
			Data scientist (1)
			Pipeline director (1)
			Product manager (1)
			Animation programmer (1)
			Graphics programmer (1)
			Lead programmer (1)
			Network coder (1)
			Rigging programmer (1)
			Unity C# programmer (1)
			Modelling supervisor (1)
			UI/UX artist (1)

Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

To judge the extent of this problem, the employers facing recruitment difficulties were asked to describe them on a scale running from "very serious" to "not at all a problem". The responses show that 12% believe the recruitment difficulties to be a very serious problem, 35% that they are a serious problem (figure 34). Only a very small proportions of employers believe that these recruitment difficulties do not create problems (4% saying that they only created minor problems and 1% that they did not create a problem at all).

Figure 34: How would you describe the problem of recruitment difficulties related to lack of relevant skills, qualifications or experience? (n = 138)

	n	%
Very serious problem (always limits our activities)	17	12
Serious problem (very often limits our activities)	48	35
Moderate problem (sometimes limits our activities)	64	46
Minor problem (rarely limits our activities)	6	4
Not at all a problem (never limits our activities)	2	1
Don't know	1	1

Source: ScreenSkills Employer Survey (2019).

Data from the UK Employer Skills Survey shows the implications of hard-to-fill vacancies (HTFVs). This data shows that the main impact is to increase the workload for other staff, though this seems to be less the case in the screen industries than across the entire economy (71% compared to 83%) (figure 35). However, HTFVs seem to particularly affect the screen industries' ability to meet customer service objectives, and quality standards; and result in delays in developing new products and services, and introducing technological change.

Figure 35: Implications of hard-to-fill vacancies (n = all employers with HTFVs)

	Screen industries	All UK
	%	%
Increase workload for other staff	71	83
Have difficulties meeting customer service objectives	60	46
Have difficulties meeting quality standards	54	33
Delay developing new products or services	53	37
Have difficulties introducing new working practices	41	33
Lose business or orders to competitors	40	40
Experience increased operating costs	36	43
Outsource work	29	29
Have difficulties introducing technological change	28	20
Withdraw from offering certain products or services altogether	26	24
None	2	6
Don't know	2	-

Source: Employer Skills Survey (2017). *Note: multiple responses allowed.*

5.2.3 Causes of recruitment difficulties

Employers were asked what they thought were the main, non-skills-related causes, of these recruitment difficulties (figure 36). The main cause cited was competition from within the sector (59% of employers facing recruitment difficulties). The lack of applicants is also noted by a significant proportion of respondents, with 48% citing a general low number of applicants, 44% reporting short lead-time on projects, 42% mentioning increasing rates of pay in boom production periods, 38% citing a low number of applicants with the required attitude, motivation or personality and 30% that there are not enough people interested in this type of job.

Figure 36: Causes of recruitment difficulties (n = 138)

	n	%
Competition from inside the sector	81	59
Low number of applicants generally	66	48
Short lead-time on projects	61	44
Increasing rates of pay in boom production periods	58	42
Job role is very narrow and specific	57	41
Low number of applicants with the required attitude, motivation or personality	52	38
Not enough people interested in the type of job	41	30
Competition from outside the sector	35	25
Remote location/poor transport links	30	22
Job entails shift work/unsociable hours	25	18
Other	20	14
Don't know	4	3

Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

5.2.4 Responding to recruitment difficulties

Nearly all of these employers had responded to their recruitment difficulties, with only 2% having taken no action (figure 37). Where action had been taken the most common action was to recruit at a lower skill level than they had intended (57%), which in turn is likely to have a significant impact on whether the workforce has the skills they need for their roles (discussed further in section 5.3). Beyond this, employers either increased training (47%) or increased salaries (46%).

The further impact of these actions should be noted. If employers are recruiting at a lower skill level than intended this may lead, further down the line, to either skills gaps (where employees do not have all the skills that they need to do the job effectively) or to increased costs, with additional training and development spend to bring the individual up to the required level.

Figure 37: Actions taken to overcome recruitment difficulties (n = 138)
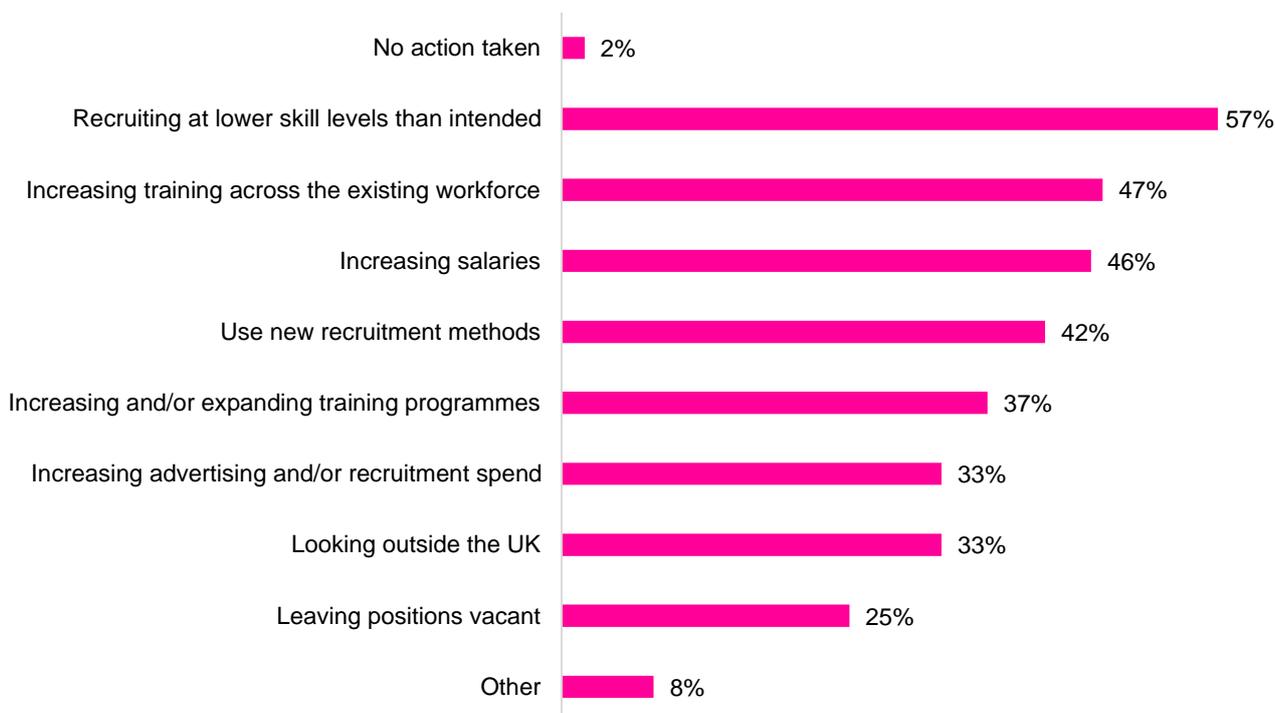
Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

Of specific interest in the current climate is whether the businesses had responded to the recruitment difficulties by trying to recruit from overseas (figure 38). 46% of screen industry employers (with HTFVs) had done so – a higher proportion than across all UK employers. This suggests that employers in the screen industries may be more likely to look overseas to address their skills issues, as well as reflecting the international focus of many screen industries (see section 2.4).

Of those screen industries employers who have tried to recruit overseas workers, nearly all have tried to recruit workers from the EU.

Figure 38: Recruitment of non-UK workers to address recruitment difficulties (n = all employers with HTFVs)

	Screen Industries	All UK
	%	%
Whether recruited, or tried to recruit, workers who are non-UK nationals in order to fill hard-to-fill vacancies		
Yes	46	38
No	54	61
Don't know	0	0
Whether the non-UK nationals recruited / sought to help fill hard-to-fill vacancies have been EU nationals, non-EU nationals or both		
EU nationals only	56	46
Non-EU nationals only	2	6
Both EU and non-EU nationals	42	44
Don't know	0	4

Source: Employer Skills Survey (2017).

5.3 Skills gap

5.3.1 Extent of skills gaps

Just over a third (35%) of respondents stated that they had skills gaps among their workforce (including freelancers) (figure 39). 57% did not feel they had, with 9% not knowing.

Figure 39: Existence of skills gaps in existing workforce or freelancers they work with (n = 418)

Source: ScreenSkills Employer Survey (2019).

The survey results moreover indicate that these skills gaps are more common in:

1. the animation and VFX sectors, with 48% of companies in animation reporting skills gaps, as did 42% of those working in VFX (Figure 40 40);
2. larger companies (Figure 41 41).

Figure 40: Existence of skills gaps in existing workforce or freelancers worked with. Subsectors (n = 418)

	Skills gap	No skills gap	Don't know
	%	%	%
All	35	57	9
Film	31	61	8
- Film Production	38	55	7
- Film Exhibition	26	68	7
- Film Distribution	25	58	17
High-end TV	39	51	10
Unscripted TV	38	59	4
Children's TV	23	59	18
Animation	48	52	0
VFX	42	50	8
Games	37	61	3
Other	32	42	26

Source: ScreenSkills Employer Survey (2019).

Figure 41: Existence of skills gaps in existing workforce or freelancers. Size of organisation (n = 418)

	Skills gap	No skills gap	Don't know
	%	%	%
Sole trader	28	57	15
1 – 4 employees	38	59	3
5 – 49 employees	34	59	8
50 – 249 employees	42	53	4
250+ employees	37	48	15

Source: ScreenSkills Employer Survey (2019).

Interestingly, those employers who believe that their workforce is representative of the diversity of the UK population are less likely to report skills gaps than those who do not think that their workforce is representative (34% compared to 43%). Although this finding needs further research to confirm it, it adds weight to calls to increase the inclusiveness of recruitment and working practices as a means to ensuring the sector has access to the talent it needs for the future.

The survey also found that skills gaps are present across the UK regions and nations (figure 42).

Figure 42: Are there any skills gaps in your existing workforce or the freelancers you work with? Regions and nations (n = 418)

	Responses	Yes	%
East of England	5	2	40
East Midlands	8	2	25
West Midlands	14	3	21
London	164	58	35
North East	12	4	33
North West	29	9	31
South East	38	14	37
South West	36	9	25
Yorkshire & Humber	21	8	38
Northern Ireland	24	11	46
Scotland	42	17	41
Wales	22	8	36
Outside the UK	3	1	33

Source: ScreenSkills Employer Survey (2019).

When asked to identify where recruitment difficulties were most noticeably (figure 43), most businesses mentioned Scotland (16%), Northern Ireland (10%), the North West (10%) and London (9%). However, a still significant number of respondents stated that skills gaps are noticeable across the country (10%).

Figure 43: Areas where skills gaps are most noticeable (n = 147)
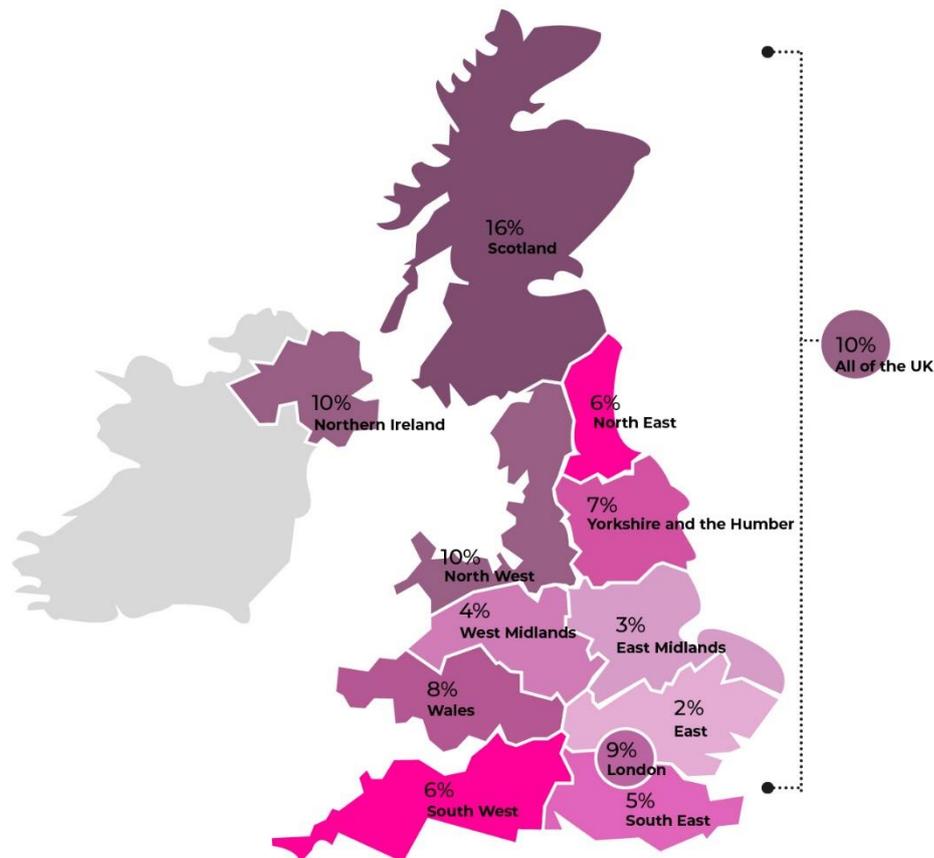
% of employers reporting in which of the nations/regions skills gaps are most noticeable

Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

5.3.2 Occupations suffering from skills gaps

Figure 44 shows the job titles identified by participants as affected by skills gaps.

In film, skills gaps are found in production accountants, production managers, producers and projectionists, whereas in high-end TV the most affected are accountants, production executives, location assistants and directors. A range of occupations were identified in animation as well, including 2D animators, animators and storyboard artists. In unscripted TV, skills gaps affect accountants, directors and assistant directors. The games sector presents skills gaps for programmers, while in VFX occupations affected are account managers, CG supervisors and VFX artists.

Figure 44: Jobs affected by skills gaps (n = 103)

High-end TV	Film	Animation	Unscripted TV
Accountant (9)	Accountant (7)	2D animator (2)	Director (5)
Production executive (9)	Production manager (6)	Animator (2)	Accountant (5)
Location assistant (7)	Producer (4)	Storyboard artist (2)	Researcher (4)
Director (6)	Projectionist (4)	2D character rigger (1)	Assistant producer (4)
Production runner (5)	First assistant director (4)	2D designer (1)	Series producer (3)
Producer (4)	Line production (4)	Assistant animator (1)	Production coordinator (3)
First assistant director (3)	Line producer (3)	Lead animator (1)	Editor (3)
Script editor (2)	Editor (3)	Rigger (1)	Make-up artist (1)
Script writer (2)	Production designer (2)	Director (1)	Production designer (1)
Assistant accountant (2)	Script supervisor (2)	Pipeline technical director (1)	Editor (1)
Showrunner (2)	Location manager (2)	Producer (1)	Producer (1)
Costume designer (1)	VFX supervisor (2)	Assistant producer (1)	Senior producer (1)
Production designer (1)	Programmer (2)	Production manager (1)	Assistant location manager (1)
Executive producer (1)	Events manager (2)	Programmer (1)	Assistant accountant (1)
Managing director (1)	Art director (1)	Compositor (1)	Technical operator (1)
Researcher (1)	Mixer (1)	Houdini artist (1)	
Script supervisor (1)	Sound recordist (1)	Storyboard artist (1)	
Series producer (1)	Executive director (1)		
Writer (1)	Film archivist (1)		
Assistant producer (1)	Customer service assistant (1)		
Unit manager (1)	Duty officer (1)		
Second assistant director (1)	Post-production supervisor (1)		
Assistant production coordinator (1)	Production assistant (1)		
Financial controller (1)	Support engineer (1)		
Line producer (1)	Team manager (1)		
Location manager (1)	ADR supervisor (1)		
Production coordinator (1)	Assistant account (1)		
Production manager (1)	Dialogue editor (1)		
Production secretary (1)	Floor manager (1)		
Assistant editors (1)	Production coordinator (1)		
Post-production coordinator (1)	Stunt coordination /stunt man (1)		
Best boy (1)			
Gaffer (1)			
Genny operator (1)			
Grip (1)			
Lighting technician (1)			

	VFX	Children's TV	Games
	Account manager (1)	Accountant (3)	Programmers (5)
	CG supervisor (1)	Director (1)	3D character animator (1)
	VFX artist (1)	Assistant director (1)	3D character rigger (1)
		Location manager (1)	Community manager (1)
			Game developer (1)
			Lead developer (1)
			Virtual developer (1)
			Marketing and sales lead (1)
			3D artist (1)
			3D facial modeller (1)

Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

5.3.3 Reasons for skills gaps

The main reasons for the skill gaps are that recruits are new to the role (65%) or that the employee's training is only partially complete (60%), both suggesting that, for the most part, training is taking place and that skills gaps are largely transient in nature (figure 45). There are some indications that the skills gaps are caused by the job changing – the introduction of new technology (25%), new products and services (19%) and new working practices (12%).

Figure 45: Reasons for skills gaps (n = all employers reporting skills gaps)

	Screen industries	All UK
	%	%
They are new to the role	65	61
Their training is currently only partially completed	60	62
They have not received the appropriate training	41	26
Unable to recruit staff with the required skills	25	26
The introduction of new technology	25	18
Staff lack motivation	19	27
The development of new products and services	19	16
They have been on training but their performance has not improved sufficiently	15	26
The introduction of new working practices	12	23
Problems retaining staff	9	13
Lack of other skills eg communication, interpersonal	2	3
Lack of aptitude to do job/reached maximum potential	1	1
No particular cause	1	1
Don't know	0	1

Source: Employer Skills Survey (2017). *Note: multiple responses allowed.*

More widely, the Work Foundation (2017) found that the rapid growth in the sector and the subsequent high demand for labour were causing skills gaps as well as skills shortages, with emerging "problems in the pipeline of talent" with people progressing to roles beyond their experience level. This is causing skills gaps among the existing workforce and is leading to a gap in the bottom of the talent pyramid.

5.3.4 Areas of skills gaps

Employers believe that these skills gaps are most common in the area of management (44%) and leadership skills (also 44%) (figure 46). This is consistent with wider evidence suggesting a "management quality deficit" in the UK relative to our international counterparts that is thought to play a significant role in hindering growth in productivity (Bloom, Sadun & Van Reenen, 2017).

In addition, 40% of respondents suggest a lack of project-management skills among the existing workforce, alongside deficiencies in advanced IT or software skills (cited by 37% of employers reporting skill gaps). More than three in 10 also suggest a lack of communication and interpersonal skills; planning and organisational skills; and financial skills – deficiencies also emphasised in the latest iteration of the ScreenSkills Barometer (April 2019).

Figure 46: Nature of skills gaps (n = 146)

Skill	Percentage
Management skills (n = 64)	44%
Leadership skills (n = 64)	44%
Project management skills (n = 58)	40%
Advanced IT or software skills (n = 53)	36%
Communication/interpersonal skills (n = 49)	34%
Planning and organisational skills (n = 49)	33%
Financial skills and the ability to work to a budget (n = 46)	32%
Supervisory skills (n = 45)	31%
Foreign language skills (n = 40)	27%
Problem-solving skills (n = 38)	26%
Resilience (n = 36)	25%
Creativity and vision (n = 34)	23%
Presentation and negotiation skills (n = 34)	23%
Other (n = 33)	23%
Client management skills (n = 30)	21%
Team-working skills (n = 28)	19%
Customer-handling skills (n = 25)	17%
Numeracy skills (n = 19)	13%
Don't know (n = 3)	2%

Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

Part of the problem is perceived as being the lack of work preparedness of new labour market entrants (Work Foundation, 2017). These gaps do not relate to job specific or technical skills, but in areas such as:

- soft skills, variously referred to as "personality", "having the right attitude", but also to "have initiative" and "be a self-starter";
- technical engagement was seen as very important, particularly in front-line technical production and post-production roles;
- broader knowledge of the film and screen industries and the production process; and
- the ability to work collaboratively and excellent communication skills.

5.3.5 Impact of skills gaps
These skills gaps are causing difficulties for nearly all employers who suffer from them to some extent (figure 47). They are a very serious problem (always limiting their activities) for 6% of these employers, a serious problem for 24% of these employers (very often limiting their activities) and a moderate problem for 49% (sometimes limiting their activities).

Figure 47: Extent of the problem of skills gaps (n = 146)

	n	%
Very serious problem (always limits our activities)	9	6
Serious problem (very often limits our activities)	35	24
Moderate problem (sometimes limits our activities)	72	49
Minor problem (rarely limits our activities)	22	15
Not at all a problem (never limits our activities)	6	4
Don't know	2	1

Source: ScreenSkills Employer Survey (2019).

Data from the 2017 UK Employer Skills Survey suggest that the main impact of the skills gaps is to increase operating costs (38% of employers with skills gaps), with 31% noting that they have increased workload for other members of staff (figure 48). Furthermore, 29% of respondents stated that skills gaps force them to outsource work, contracting out to external suppliers/freelancers.

Figure 48: Implications of skills gaps (n = all employers reporting skills gaps)

	Screen industries	All UK
	%	%
Have higher operating costs	38	27
Increase workload for other staff	31	51
Outsource work	29	11
Have difficulties introducing new working practices	18	23
Delay developing new products or services	17	29
Have difficulties meeting quality standards	16	24
Lose business or orders to competitors	15	21
No particular problems / None of the above	34	41
Don't know	0	*

Source: Employer Skills Survey (2017). *Note: multiple responses allowed.*

5.3.6 Actions taken to address skills gaps

Employers most commonly believe that an expansion of traineeships, internships or work placement programmes would help to tackle the skills gap (63%) (figure 49). 56% believe that they could implement a mentoring or buddying scheme, with 53% suggesting increasing the training spend for freelancers.

Figure 49: Actions which could help tackle skills gaps (n = 146)

	n	%
Expand traineeships/internships / work placement programmes	92	63
Implement mentoring/buddying scheme	82	56
Increase training spend for freelancers	78	53
Increase training spend for workforce on payroll	71	49
Expand apprenticeship programmes	66	45
Invest in skills levies	63	43
More supervision of staff	39	27
Other	17	12
Reallocate work	16	11
Don't know	7	5

Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

6 Workforce training and development

6.1 Introduction

In a dynamic and fast-changing global marketplace, the importance of workforce training and development cannot be overstated. Research has consistently found a relationship between workforce training and the improvement of organisational retention, productivity and profitability (Aguinis & Kraiger, 2009; Das & Baruah, 2013). Besides benefits to the organisation, the empowerment of employees through training has been found to have a substantially positive effect on job satisfaction (Hanaysha & Tahir, 2016) and organisational commitment (Hanaysha, 2016).

This section examines workforce training and development in the UK screen industries, including payroll staff and freelancers, by looking at the planning and delivery of training and workforce development, the extent and nature of learning while in work in the screen industries, and employers' plans for investment in training in the future.

6.2 Delivery of training and workforce development

Figure 50 shows the proportion of organisations that have funded or arranged training for their workforce. The ScreenSkills Employer Survey found that 60% of employers stated that their organisation had arranged or funded training in 2018. 36% reported they had not organised or funded training. This suggests that employers are indeed taking actions to support workforce development but the persistence of skills gaps may indicate either a mismatch between the type of training needed and the supply or the need for more investment to keep up with the growing demand and a booming sector.

Figure 50: Has your organisation arranged or funded any training for the workforce in the last 12 months? (n = 418)

Source: ScreenSkills Employer Survey (2019).

Figure 51 below presents the proportion of employers who arranged or funded training in 2018 for each of the sectors of the screen industries. The survey results suggest that more employers in film exhibition (74%), children's TV (73%) and unscripted TV (72%) have invested in training for their workforce than employers in animation (48%) and film production (44%).

Figure 51: Has your organisation arranged or funded any training for the workforce in the last 12 months? Subsector (n = 418)

	Responses	Yes	%
Film	158	90	57
- Film production	71	31	44
- Film exhibition	62	46	74
- Film distribution	12	7	58
High-end TV	80	53	66
Unscripted TV	53	38	72
Children's TV	22	16	73
Animation	29	14	48
VFX	12	8	67
Games	33	16	49
Other	31	14	45

Source: ScreenSkills Employer Survey (2019).

Figure 52 shows that, in proportion, employers based in the South West, Northern Ireland and London have invested in training more than employers based in the South East and Yorkshire.

Figure 52: Has your organisation arranged or funded any training for the workforce in the last 12 months? Regions and nations (n = 418)

	Responses	Yes	%
East of England	5	3	60
East Midlands	8	5	63
West Midlands	14	8	57
London	164	105	64
North East	12	7	58
North West	29	14	48
South East	38	18	47
South West	36	24	67
Yorkshire & Humber	21	11	52
Northern Ireland	24	16	67
Scotland	42	24	57
Wales	22	12	55
Outside the UK	3	2	67

Source: ScreenSkills Employer Survey (2019).

The ScreenSkills Employer Survey also found that larger organisations are significantly more likely to arrange or fund training than medium- and smaller-size organisations (figure 53). This is in line with the research conducted by the Federation of Small Businesses (2017) that found that only 24% of small businesses in the UK has arranged training for their workforce in 2017. This should come as no surprise since, in many cases, larger organisations have formal workforce development schemes in place, combined with availability of financial resources to be devoted to training.

Figure 53: Has your organisation arranged or funded any training for the workforce in the last 12 months? Size of the organisation (n = 418)

	Responses	Yes	%
Not specified	10	4	40
Sole trader	72	19	26
1 – 4 employees	92	37	40
5 – 49 employees	172	123	72
50 – 249 employees	45	38	84
250+ employees	27	25	93

Source: ScreenSkills Employer Survey (2019).

Figure 54 below presents the groups of workers which employers arranged or funded training for in the last 12 months. The vast majority or surveyed employers (84%) invested in training for payroll staff. Only a third of employers (33%) invested in training for freelancers. Furthermore figure 54 shows that employers were more likely to arrange or fund training for early career and experienced workers than for apprentice, entrant and expert workers[54].

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[54] See figure 71 in appendix C for a definition of these grades.

Figure 54: For which of the following groups did your organisation arrange or fund training? (n = 248)
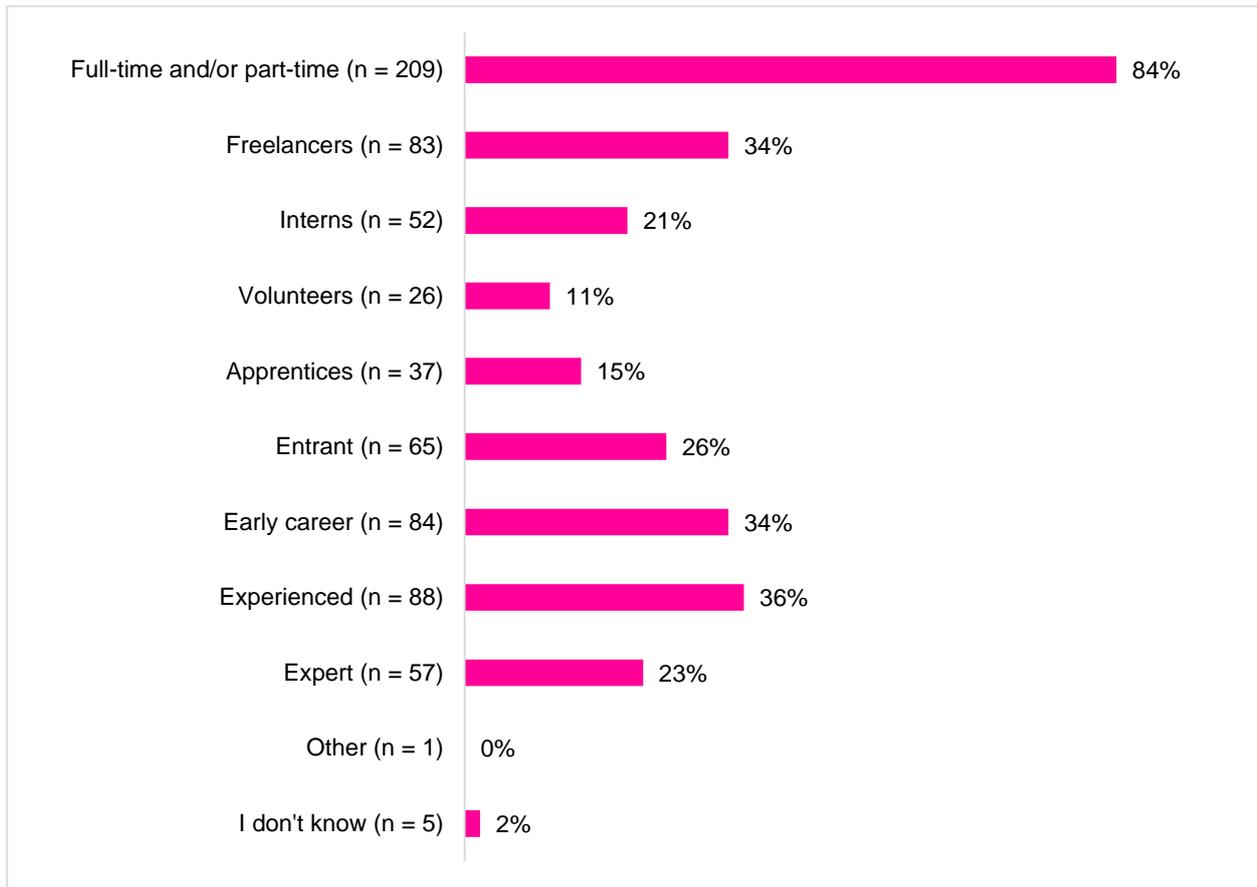
Source: ScreenSkills Employer Survey (2019). *Note: multiple responses allowed.*

The findings suggest that employers in high-end TV, unscripted TV and VFX seem currently more likely to invest in training for freelancers than employers in film production. As seen in figure 55, the highest levels of training for freelancers were in TV subsectors, animation and VFX (HETV – 50.9%, unscripted TV – 55.3%, children's – 40%, animation– 42.9% and VFX – 50%). While film and games offered very little training to their freelancers (15% and 11.8% respectively). In sectors such as TV and film production, whose workforce consists primarily of freelancers (see section 3.3), this could be problematic.

On the other hand, figure 55 shows across all the subsectors fairly healthy levels of training being arranged for employees on permanent contracts.

Figure 55: For which of the following groups did your organisation arrange or fund training? (n = 248)

■ Payroll   ■ Freelancers

Group	Payroll	Freelancers
Film (n = 90)	80%	16%
Film production (n = 31)	52%	32%
Film exhibition (n = 46)	96%	4%
Film distribution (n = 7)	100%	0%
High-end TV (n = 53)	85%	51%
Unscripted TV (n = 38)	90%	55%
Children's (n = 15)	80%	40%
Animation (n = 14)	85%	43%
VFX (n = 8)	100%	50%
Games (n = 17)	94%	13%
Other (n = 14)	79%	21%
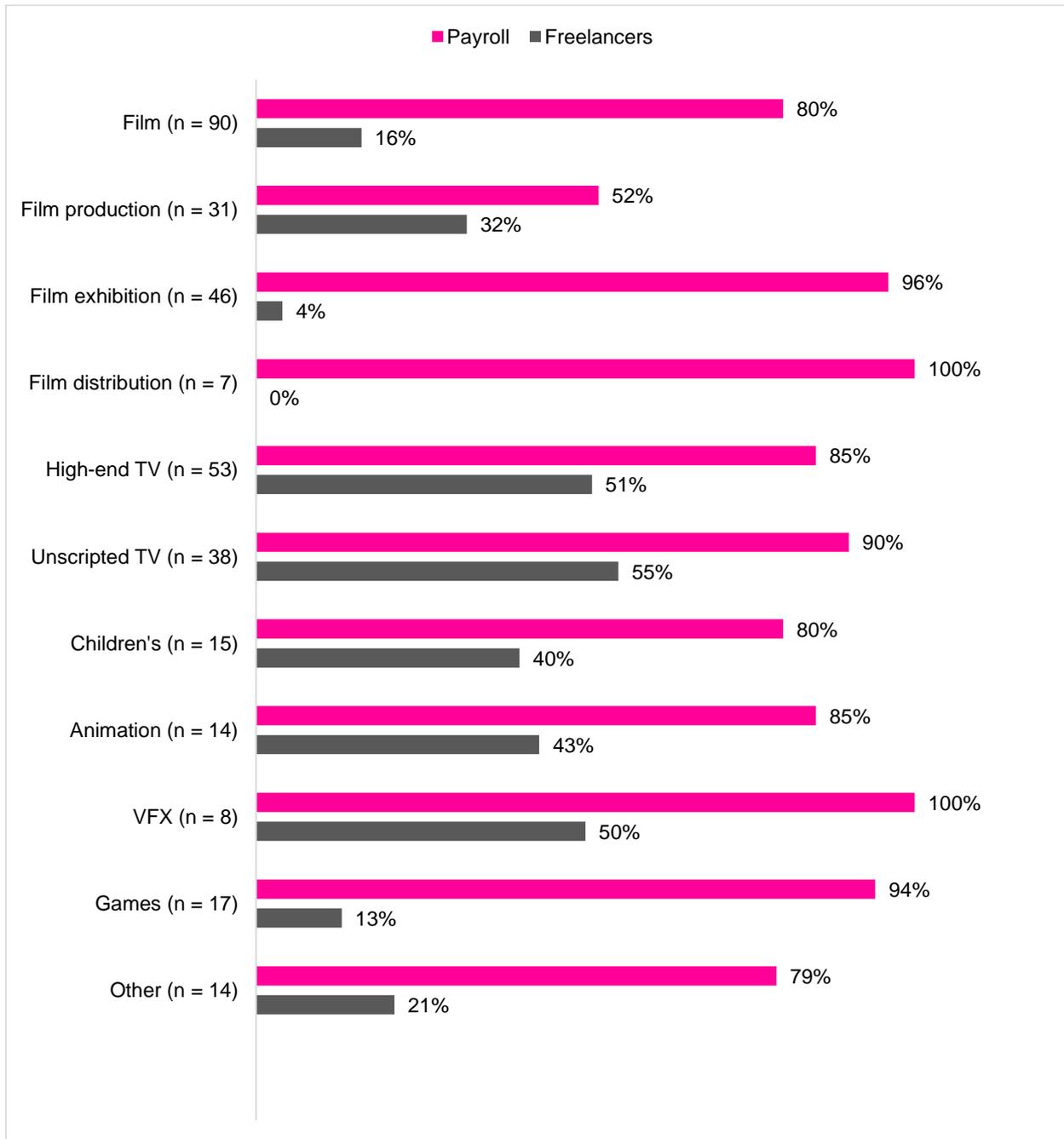
Source: ScreenSkills Employer Survey (2019).*Note: multiple responses allowed.

Figure 56 below shows the reasons why employers choose not to invest in training. The ScreenSkills Employer Survey identified that a lack of financial resources (32%) was cited as the main reason why employers refrained from arranging or funding training for the workforce. Moreover, 24% of employers stated the use of freelancers as the main reason for not investing in training. 21% reported that the workforce is already skilled enough.

Figure 56: Which factors have prevented your organisation from arranging/funding training? (n = 145)

	n	%
Little / no money available for training	47	32
We mainly work with freelancers for whom we do not provide training	35	24
Not enough time to take part in training	30	21
Opinion that workforce already has required skills	30	21
No relevant training available	20	14
No particular reason	18	12
Courses not provided where employers are based	14	10
Training not considered a priority	14	10
Course providers not of reliable quality	8	6
I don't know	7	5
Fear of trained staff being poached	6	4

Source: ScreenSkills Employer Survey (2019).

The most common action taken to overcome skills gaps has been to increase training activity and spend and to increase or expand trainee programmes (57% of these employers) (figure 57). There is also increased oversight of employees, either more supervision of staff (41%), more staff appraisals (34%) and more employers implementing mentoring or buddying schemes (34%).

Figure 57: Actions taken to overcome lack of proficiency among staff with skills gaps
(n = all employers reporting skills gaps)

	Screen industries	All UK
	%	%
Increase training activity / spend or increase/expand trainee programmes	57	67
More supervision of staff	41	54
More staff appraisals / performance reviews	34	45
Implementation of mentoring / buddying scheme	34	44
Reallocating work	16	35
Changing working practices	24	27
Increase recruitment activity / spend	7	21
Recruiting workers who are non-UK nationals	6	10
Other	6	2
Nothing	33	16
Don't know	1	1

Source: Employer Skills Survey (2017). *Note: multiple responses allowed.*

6.3 Nature of training and workforce development

Figure 58 below present the types of training arranged or funded for the workforce (including payroll staff only) in the last 12 months. These figures represent payroll workers only.

The 2017 Employer Skills Survey (ESS) found that of the 32% of employers in the screen industries offered both off-the-job and on-the-job training. "Off-the-job training" is usually defined as training that takes place *outside* the working environment. By contrast, "on-the-job training" is provided at the place of work. The ESS moreover found that 12% of employers invested in only off-the-job training and 17% invested in only on-the-job training.

Figure 58: Types of training arranged or funded for employees in the last 12 months

		UK economy	Screen industries
		%	%
Train		66	61
	Off-job and on-job training	35	32
	Off-job training only	13	12
	On-job training only	18	17
Don't train		34	39

Source: Employer Skills Survey (2017).

Figure 59 presents a breakdown of the specific types of training that employers invested in in the last 12 months. The table shows that the vast majority of employers in the screen industries who invested in training arranged or funded job specific training (78%). This is followed by training in new technology (63%) and basic staff inductions (59%).

Figure 59: Types of training arranged of funded for employees in the last 12 months

	UK economy	Screen industries
	%	%
Job-specific training	84	78
Training in new technology	48	63
Basic induction training new staff receive when they start the job	65	59
Health and safety / first aid training	74	57
More extensive induction training for new staff	36	28
Management training	35	27
Supervisory training	35	25
Personal Development Training	1	-
Any other types	1	1
None of these	1	3
Don't know	-	-

Source: Employer Skills Survey (2017). *Note: multiple responses allowed.*

Figure 60 presents other valuable actions taken by employers to support the development of employees. 64% of employers allowed tasks to go beyond their strict job roles and then provided them with feedback, 59% provided opportunities for staff to spend time learning by watching others perform their jobs, both these above the wider UK economy average; and 49% provided supervision to guide employees over time, which is a preferred means of training in the wider economy to that of the screen industry (52%).

Figure 60: Actions taken to aid the development of employees

	UK economy %	Screen industries %
Allowed staff to perform tasks that go beyond their strict job role	48	64
Provided opportunities for staff to spend time learning through watching others perform their job	49	59
Supervision to ensure that employees are guided through their job role over time	52	49
Any broader development activities	65	76
None of these broader development activities	34	24
I don't know	1	0

Source: Employer Skills Survey (2017).

As the ESS finds, and in line with findings presented in figure 54 and figure 55, employers do not necessarily invest in training for all their staff. As shown in figure 61, in fact surveyed employers offered training to 57% of their staff. This is approximately 5% lower than surveyed employers across the wider UK economy. The ESS also finds that screen industry employees who receive training (trainees) receive on average just below six days training each or 3.27 days on average for all staff. This is on both counts slightly below than the UK economic average.

Figure 61: Level of training activities (n = all employers who offered training)

	UK economy	Screen industries
Proportion of staff trained	62%	57%
Training days per trainee	6.39	5.71
Training days per staff	3.97	3.27

Source: Employer Skills Survey (2017).

6.4 Future training and skills challenges

The ScreenSkills Employer Survey identified that 68% of surveyed employers think their organisation provides enough training to deal with current skills needs. By contrast, the survey found that just over half (55%) think their organisation provides enough training to deal with future skills needs (figure 62). Although further research is needed to confirm this, it appears that employers are less confident about whether or not their organisation and workforce are ready to face future skills needs.

Figure 62: Do you think your organisation is providing enough training to deal with current skills needs? (n = 248)
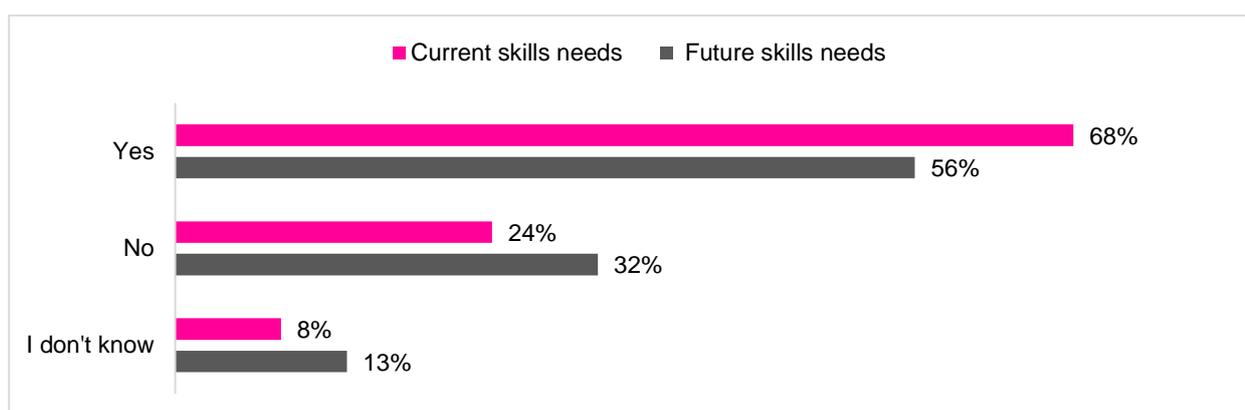
Source: ScreenSkills Employer Survey (2019).

The ScreenSkills Employer Survey found that 78% of surveyed employers who are already investing in training for their workforce also plan to invest in future training (figure 63).

Figure 63: Do you plan to arrange more training for your workforce (payroll and freelance) over the next 12 months? (n = 248)
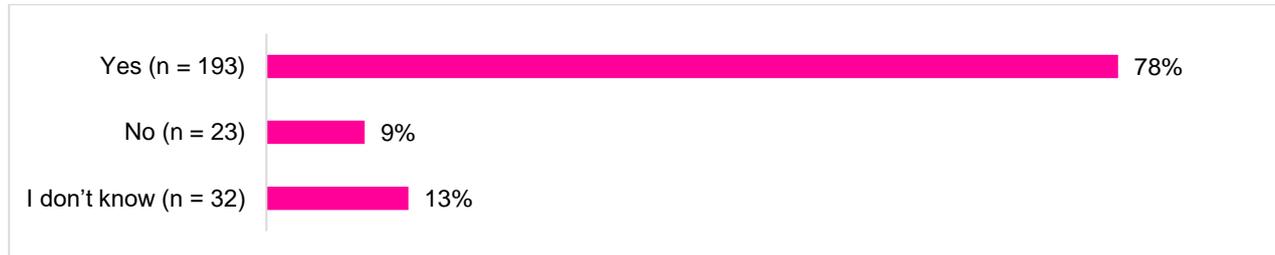
Source: ScreenSkills Employer Survey (2019).

Asked what types of training would best suit their organisation's needs in future, 78% of surveyed employers stated training for those already in the workforce (figure 64). This response was closely followed by informal on-the-job training (73%), such as mentoring or job-shadowing.

Figure 64: What types of training would best suit your organisation's needs in future? (n = 248)

	n	%
Training courses for those already in the workforce	194	78
Informal on-the-job training (eg mentoring, job-shadowing)	182	73
Technical/vocational training for those new to the workforce (eg apprenticeships)	131	53
Other – please specify	21	9
I don't know	9	4

Source: ScreenSkills Employer Survey (2019).

7 Conclusions and strategic priorities

The UK screen industries are a success story and fast growing. Employment in the sector is highly skilled, freelance-oriented and requires, above all, highly qualified workers.

Despite the success of the screen industries, the sector is also facing significant skills and diversity challenges. To overcome these challenges it is important to establish an accurate, coherent picture of the labour market in UK screen. Information of this kind helps to identify the potential causes and nature of skills and diversity challenges, which in turn allows for the development of subsector-specific policies and solutions to address these issues.

While a bank of useful research exists that gives insight into specific screen industry sectors or features, a comprehensive study of the labour market conditions in UK screen was hitherto lacking. As the first study of its kind in the sector, the Annual ScreenSkills Assessment 2018-19 seeks to move us closer to building such a picture for the industry by drawing together existing and new research under a single study.

Some of the research findings confirm what is already known about the industry, such as the fact that the sector is facing diversity challenges. However, our analysis of national data sources and the results of the ScreenSkills Employer Survey also shines new light on certain areas and facets of UK screen. We now know for instance that there are approximate 211,000 workers in the sector; that half of surveyed employers think their organisation is not reflective of UK diversity; and that there is an indication that employers who think their organisation is reflective of UK diversity report fewer skills gaps and shortages than their counterparts.

While many of the areas touched on in this study are in need of further research, we hope that the findings collated in this document serve as a starting point for further, subsector-specific investigations into the abovementioned challenges.

7.1 Skills gaps and shortages

The findings of the ScreenSkills Employer Survey 2019 show that approximately a third of employers report that they experience **recruitment difficulties**. However, there is evidence that recruitment difficulties are not equally distributed across the subsectors of the industry, being more commonly reporting in animation, games and VFX.

The ScreenSkills Employer Survey found that the most common areas of shortage relate to production and development roles – job roles such as (in development) directors, producers and development producers, and (in production) of line producer, production managers, assistant directors, production accountants and studio manager. There are also significant shortages in advanced IT and art areas of artists, technical artists and animators, particularly in animation, games and VFX.

Although not common across the entire sector, where these difficulties exist, they are causing issues for businesses, with 47% believing they are a serious or very serious problem, very often or always limiting the businesses' activities. For another 46% of employers who stated they experience recruitment difficulties they are causing moderate problems, sometimes limiting the business' activities. Given that the most common response to recruitment difficulties is to recruit at a lower skill level than was intended, it also suggests that there are knock-on effects and may well be creating internal skills gaps after recruitment.

Just over a third of employers (35 per cent) stated that their existing workforce had **skills gaps**. Furthermore, for almost a third of employers affected by them skills gaps cause serious or very serious problems. These skills gaps were most common in the TV programming and broadcasting, animation and VFX sectors. Again, we see that these are most common in production and development roles.

While surveyed employers identified a wide range of skills gaps, they identified management, leadership and project management skills as most commonly lacking among the current workforce. This indicates that UK screen might be suffering from a management quality deficit, the exact extent and nature of which needs to be further investigated.

7.2 Freelance work

Self-employment is a key part of the employment structure of UK screen. The data suggests that, overall, the level of self-employment in the sector is around 28%: almost twice as high as the UK average of 15%. In some subsectors within the screen industries, particularly in film and TV production, the level of self-employment is significantly higher: around 50%.

Furthermore, the ScreenSkills Employer Survey found that 86% of surveyed employers work with freelancers, and 80% do so frequently or very frequently. The results also indicate that employers from across the sector are more likely to hire freelancers in experienced or expert grades than those in the early stages of their career or recent entrants.

This not only confirms the general view that freelance work in the sector is widespread, but also points towards potential issues in the areas of skills and diversity. For instance, although skills gaps are widespread, only a third of surveyed employers are able to provide training for freelancers, compared to 84% for in-house employees. Despite the fact that freelancers form a large part of the screen labour market, the findings seem to suggest that not enough is being done to support career development among freelancers. This might in turn aggravate skills challenges in the industry.

7.3 Diversity

The sector has long struggled with attracting, building and retaining a **diverse workforce** and this report finds that this remains an issue that needs continuing attention.

Women are under-represented across the sector, as are those from non-white ethnic groups and those whose parents are from lower occupational groups. Just 38% of surveyed employers believe that their workforce is reflective of the diversity of the UK population, with 52% believing that it is not. The most common reason cited for this lack of diversity is a lack of applications from under-represented groups, which suggests that there are pipeline issues.

Recent years have seen the introduction of a series of initiatives to improve the diversity of the UK workforce. This data suggests that these initiatives need to be continued (and possibly enhanced) in order for the diversity of the workforce to be improved.

7.4 Areas for further research

While the aim of the Annual ScreenSkills Assessment is to build an accurate and robust picture of the sector, the current study necessarily contains a number of limitations:

1. Current national data sources do not accurately capture the games sector, and neither do they cover fast- and/or newly evolving occupations. This means that some of the data presented in our research, such as diversity statistics, cannot be generalised for those areas and/or roles of the industry.

2. The Annual ScreenSkills Assessment found that there are no national statistics available for earnings of the freelance workforce.

3. The national diversity statistics currently available cannot be presented for each of the subsectors of the industry. Furthermore, data on several important characteristics such as religion, caring duties and sexual orientation is not available for the sector.

4. While the Employer Survey is broadly representative of the subsectors of the industry, certain regions such as the East of England and the South East are under-represented in our sample. This means that caution is advised when generalising the findings of this research.

5. Based on the data collected through the survey we have not been able to draw any conclusive relationships between certain key-variables, such as diversity, skills gaps and recruitment difficulties. Although the survey found a number of interesting correlations between these variables, further research is needed to confirm their statistical validity.

6. The Annual ScreenSkills Assessment 2018-2019 does not cover migration of labour between the subsectors of the industry. This means that our current research is not able to shine light on whether skills gaps and shortages migrate from one area of the industry to another.

The Annual ScreenSkills Assessment highlights several areas that require further research, including:

1. **Freelance work in each of the subsectors of the industry:** further research is needed to better understand the working patterns and earnings of freelancers, as well as any challenges they might face. While research of this kind is already undertaken in, for instance, broadcast TV, future research on freelance work should be undertaken for each of the subsectors of the industry.

2. **Diversity statistics in each of the subsectors of the industry:** further research is needed to provide a better understanding of diversity levels and challenges in each of the subsectors of the industry, and in particular of currently under-represented characteristics such as religion, caring duties, socio-economic background and sexual orientation. This would in turn aid the development of sustainable and subsector-specific solutions to diversity issues in the industry. Research of this kind would greatly benefit from the expansion of more inclusive and consistent diversity monitoring systems across the sector at large.

3. **Hiring versus retention of older workers in the workforce:** further research is needed to better understand whether workers over the age of 50, who are under-represented in the workforce compared with the UK workforce as a whole, are choosing to leave the industry at a certain stage of their career or are failing to be employed. Furthermore, further research is needed to determine what the implications of this are in terms of any loss of skills

4. **Relationships between diversity levels, skills gaps and skills shortages:** further research is needed to determine whether diversifying the workforce would address skills challenges, and also to better understand if and how the pressures created by the production boom are making it harder to address diversity and inclusivity. Further research is also needed to determine how these relationships manifest themselves in each of the subsectors of the industry. Insights of this kind would greatly aid the development of more subsector-specific solutions to both diversity and skills challenges.

5. **New occupations and migration of labour between the subsectors:** further research is needed to identify new and/or fast-evolving occupations in the sector, as well as the migration of labour between certain subsectors of the industry. Information of this kind could help us anticipate new skills gaps and shortages and guide investment in training and professional development.

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Appendix A – Introduction

Skills Forecasting Service[55]

In the autumn of 2018 we launched the Skills Forecasting Service (SFS) to investigate current and future skills challenges and needs in the screen industries. The service is an integral part of ScreenSkills' strategy and a key delivery objective of the BFI Future Film Skills Action Plan (PDF).

The research we undertake aims to tackle significant gaps in the existing evidence base, as identified by the Skills Audit of the UK Film and Screen Industries (PDF) which was carried out for the British Film Institute (BFI) in 2017 and which has been reinforced by our further consultation with business, industry associations, screen agencies, policymakers and training providers.

The first year of research (2018-19) has been carried out in partnership with the Work Foundation, the advocacy and research organisation which is part of Lancaster University. This research was made up of three work streams:

1. The **Quarterly ScreenSkills Barometer**: provides regular, short-term snapshots on business activity, skills gaps and shortages and training practices across, and is underpinned by a short online survey completed by a rolling panel of around 50 industry experts;
2. The **Annual ScreenSkills Assessment 2018-19**: provides an in-depth analysis of the screen industries' labour market and workforce, diversity and inclusion statistics, skills gaps and shortages experienced by employers in the sector, and training provisions. The ASA is underpinned by a specially commissioned employer survey, which was completed by 418 employers across the industry, and;
3. The **ScreenSkills Forecasting Analysis**: provides a forward-looking analysis of drivers of change and the future of work in the sector. The study is based on a rapid evidence assessment and insights gained from a series of in-depth Delphi Panel interviews with 22 industry experts.

Figure 65: Research strands of the Skills Forecasting Service 2018-19

Skills Forecasting Service 2018-19

Quarterly ScreenSkills Barometer	Annual ScreenSkills Assessment	ScreenSkills Foresighting Analysis
Purpose: provide responsive, short-term insights on skills gaps and shortages, recruitment challenges and training practices	**Purpose:** provide an in-depth assessment of workforce profile and diversity, skills gaps and shortages, recruitment challenges and future trends	**Purpose:** provide a forward-looking analysis of likely changes in our industries' needs and ways of working
Method: quarterly online survey completed by a small rolling panel of industry experts	**Method:** online employer survey completed by a large sample, corroborated by literature reviews and national data sources	**Method:** Delphi panel consultations with industry experts, corroborated by literature reviews and national data sources

For more information, please visit the SFS page on our website.

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[55] More information about ScreenSkills' research and the Skills Forecasting Service is available here.

Figure 66: Definition of the screen industries

SIC code	SIC title	Description of sector
58.21	Publishing of Computer Games	This class includes the publishing of computer games for all platforms
59.11	Motion picture, video and television programme production activities	This class includes the: ● production of motion pictures; ● production of videos; ● production of television programmes (television series, documentaries etc.), or television advertisements.
59.12	Motion picture, video and television programme post-production	This class includes post-production activities such as editing, film/tape transfers, titling, subtitling, credits, closed captioning, computer-produced graphics, animation and special effects, developing and processing motion picture film, as well as activities of motion picture film laboratories and activities of special laboratories for animated films. This class also includes: the activities of stock footage film libraries, etc.
59.13	Motion picture, video and television programme distribution	This class includes: ● distributing film to motion picture theatres, television networks and stations, and exhibitors. This subclass also includes: acquiring film distribution rights; ● distributing video tapes, DVDs and similar productions to motion picture theatres, television networks and stations, and exhibitors and also includes acquiring video tape and DVD distribution rights; ● distributing television programmes to television networks and stations, and exhibitors and also includes acquiring television distribution rights.
59.14	Motion picture projection activities	This class includes: ● activities of motion picture or video tape projection in cinemas, in the open air or in other projection facilities; and ● activities of cine-clubs.
60.20	Television programming and broadcasting activities	This class includes the activities of creating a complete television channel programme, from purchased programme components (*eg* movies, documentaries, etc), self-produced programme components (eg local news, live reports) or a combination thereof. This complete television programme can be either broadcast by the producing unit or produced for transmission by a third-party distributor, such as cable companies or satellite television providers. The programming may be of a general or specialised nature (eg limited formats such as news, sports, education or youth-oriented programming). This class includes programming that is made freely available to users, as well as programming that is available only on a subscription basis. The programming of video-on-demand channels is also included here. This class also includes data broadcasting integrated with television broadcasting.
62.01/1	Ready-made interactive leisure and entertainment software development	This subclass includes the development, production, supply and documentation of ready-made interactive leisure and entertainment software, such as games software, designed for publication by a different enterprise. A key component part of the software is audio-visual content with which the user interacts. The software can be published across any format, such as games consoles, the internet and mobile phones.

Source: UK Standard Industrial Classification of Economic Activities (2007), Office for National Statistics.

Appendix B – chapter 2

Figure 67: Worker per nation/region and location quotients

	Screen industries	LQ
	n	
Total	**169,000***	
London	84,000	3.03
Scotland	13,000	0.94
South East	18,000	0.78
Wales	5,000	0.73
South West	9,000	0.62
North West	11,000	0.59
East of England	8,000	0.54
East Midlands	6,000	0.52
Northern Ireland	**	0.45
Yorkshire & Humber	6,000	0.45
North East	**	0.39
West Midlands	5,000	0.36
Outside UK	**	

Source: Labour Force Survey (2017). *Note: this figure does not accurately capture the games workforce. For further information, see chapter 3. **Note: as LFS results with values below 4,000 cannot be presented, this figure does not contain statistics for Northern Ireland, the North East, and outside the UK.*

Appendix C – chapter 3

Figure 68: Does your organisation work with freelancers? Size of the organisation (n = 418)

	Responses	Yes	%
Not specified	5	2	40
Sole trader	72	68	94
1 – 4 employees	92	86	94
5 – 49 employees	172	143	83
50 – 249 employees	45	38	84
250+ employees	27	20	74

Source: ScreenSkills Employer Survey (2019).

Figure 69: Does your organisation work with freelancers? Regions and nations (n = 418)

	Responses	Yes	%
East of England	5	4	80
East Midlands	8	3	38
West Midlands	14	10	71
London	164	154	94
North East	12	10	83
North West	29	26	90
South East	38	33	87
South West	36	26	72
Yorkshire & Humber	21	18	86
Northern Ireland	24	21	88
Scotland	42	37	88
Wales	22	17	77
Outside the UK	3	2	67

Source: ScreenSkills Employer Survey (2019).

Figure 70: Does your organisation work with freelancers? Main SIC code activity (n = 418)

	Responses	Yes	%
59.11 Film and TV production	205	201	98
59.12 Film and TV post-production	41	40	98
59.13 Film and TV programme distribution	12	9	75
59.14 Film exhibition	64	30	47
60.20 TV programming and broadcasting	21	19	91
58.21 & 62.01/1 Development and publishing of games	31	22	71
Other	44	40	91

Source: ScreenSkills Employer Survey (2019).

Figure 71: ScreenSkills career grades

Career stage	Entry	Early	Experienced	Expert
Short form description	Entering the screen industries	Establishing your career	Progressing your career	Acknowledged as expert
Education history	I left full-time education within the last two years.	I left full-time education more than two years ago.	I left full-time education more than five years ago.	It has been 10 years or more since I was in full-time education.
Career	I'm still working that out, but I've decided the screen industries are definitely for me.	I have a sense of which job role or department I want to work in but as yet I might not be working regularly within it.	I've chosen my job role or department and I am regularly working in it.	I have chosen my specific job role or department and I am now acknowledged as being an expert in my chosen field.
Professional engagements	I am working towards my first couple of professional production credits or full-time employed roles in the screen industries.	I have two or more professional production credits and/or have been employed in an industry-recognised role on two or more occasions.	I have a number of professional production credits in my current role or I am transferring in with advanced skills from another sector. I have been working in my chosen industry-recognised role for a number of years full-time.	I have built up a portfolio of professional credits. I am highly regarded in my field and consistently work in advanced positions within my specialisation.
Budgetary responsibility	I am not expected to manage budgets or spend money on behalf of the production or company.	I have very minor budgeting responsibility, often restricted to petty cash or acquiring quotes for goods and services.	I might expect to be in control of my budget, reporting to a more senior member of the production or company.	I might be in control of my departmental budget, which could have many categories. I might be aware of other departments/overall budgeting strategy and report directly into the most senior member of finance.
Team management	I do not manage anyone else other than myself.	I manage myself and sometimes others also at my level.	I might be responsible in my department for overseeing entry- and early-stage career colleagues working with me.	I am responsible in my department for overseeing entry- and early-stage career colleagues working with me.

Figure 72: For which grades do you usually hire freelancers? Subsectors (n = 361)

Legend: Entrant, Early career, Experienced, Expert, Other

Film (n = 119)
- Entrant: 39%
- Early career: 50%
- Experienced: 77%
- Expert: 70%
- Other: 1%

Film production (n = 69)
- Entrant: 45%
- Early career: 59%
- Experienced: 80%
- Expert: 68%
- Other: 0%

Film exhibition (n = 29)
- Entrant: 28%
- Early career: 35%
- Experienced: 76%
- Expert: 76%
- Other: 3%

Film distribution (n = 9)
- Entrant: 22%
- Early career: 33%
- Experienced: 67%
- Expert: 78%
- Other: 0%

High-end TV (n = 77)
- Entrant: 47%
- Early career: 58%
- Experienced: 83%
- Expert: 73%
- Other: 7%

Unscripted TV (n = 52)
- Entrant: 50%
- Early career: 64%
- Experienced: 87%
- Expert: 81%
- Other: 0%

Children's TV (n = 21)
- Entrant: 62%
- Early career: 76%
- Experienced: 81%
- Expert: 86%
- Other: 5%

Animation (n = 29)
- Entrant: 24%
- Early career: 45%
- Experienced: 97%
- Expert: 72%
- Other: 0%

VFX (n = 10)
- Entrant: 20%
- Early career: 50%
- Experienced: 70%
- Expert: 100%
- Other: 0%

Games (n = 24)
- Entrant: 13%
- Early career: 29%
- Experienced: 83%
- Expert: 67%
- Other: 4%

Other (n = 29)
- Entrant: 41%
- Early career: 62%
- Experienced: 72%
- Expert: 52%
- Other: 3%

Source: ScreenSkills Employer Survey (2019).

Figure 73: How often does your organisation work with freelancers? Subsectors (n = 361)

Legend: ■ (Very) frequently ■ Occasionally ■ (Very) rarely

Film (n = 119): 71%, 19%, 10%

Film production (n = 69): 74%, 17%, 9%

Film exhibition (n = 29): 62%, 21%, 17%

Film distribution (n = 9): 67%, 22%, 11%

High-end TV (n = 77): 83%, 14%, 1%

Unscripted TV (n = 52): 90%, 6%, 4%

Children's TV (n = 21): 95%, 5%, 0%

Animation (n = 29): 83%, 14%, 3%

VFX (n = 10): 90%, 10%, 0%

Games (n = 24): 67%, 21%, 13%

Other (n = 29): 66%, 24%, 10%
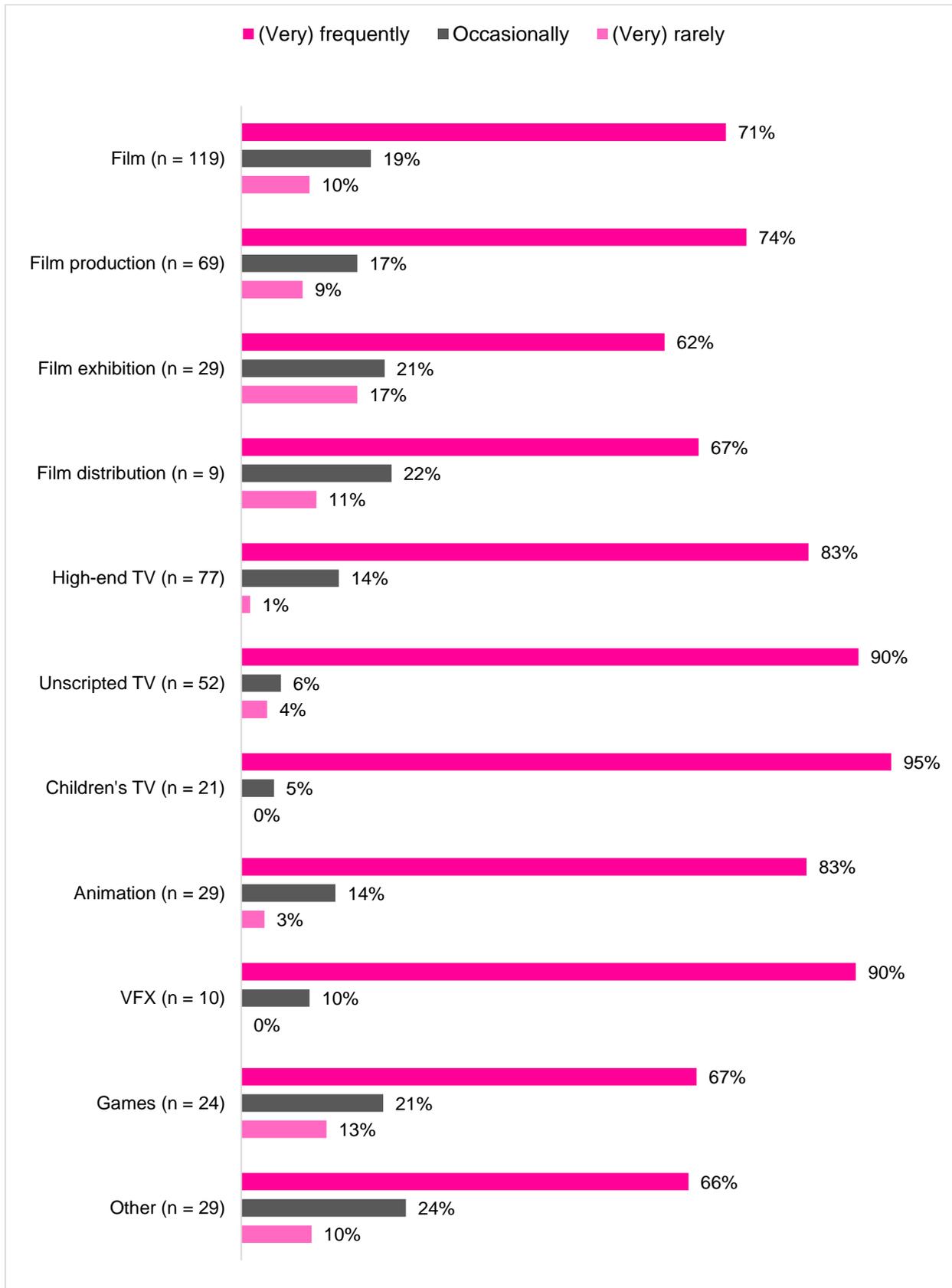
Source: ScreenSkills Employer Survey (2019).

Figure 74: Do you work with interns and volunteers? (n = 361)

Yes (n = 125) — 35%
No (n = 230) — 64%
I don't know (n = 6) — 2%

Source: ScreenSkills Employer Survey (2019).

Figure 75: Do you work with interns and volunteers? Subsectors (n = 361)

	Responses	Yes	%
Film	119	61	51
- Film production	69	31	45
- Film exhibition	29	21	72
- Film distribution	9	5	56
High-end TV	77	14	18
Unscripted TV	52	18	35
Children's TV	21	9	43
Animation	29	5	17
VFX	10	2	20
Games	24	7	29
Other	29	9	31

Source: ScreenSkills Employer Survey (2019).

Figure 76: Do you work with interns and volunteers? Size of the organisation (n = 361)

	Responses	Yes	%
Not specified	6	2	33
Sole trader	68	20	29
1 – 4 employees	86	30	35
5 – 49 employees	143	54	38
50 – 249 employees	38	12	32
250+ employees	20	7	35

Source: ScreenSkills Employer Survey (2019).

Figure 77: Do you work with interns and volunteers? Regions and nations (n = 361)

	Responses	Yes	%
East of England	4	4	100
East Midlands	3	1	33
West Midlands	10	3	30
London	154	53	34
North East	10	7	70
North West	26	15	58
South East	33	8	24
South West	26	10	39
Yorkshire & Humber	18	6	33
Northern Ireland	21	4	19
Scotland	37	8	22
Wales	17	5	29
Outside the UK	2	1	50

Source: ScreenSkills Employer Survey (2019).

Figure 78: Do you work with interns and volunteers? Main SIC code activity (n = 361)

	Responses	Yes	%
59.11 Film and TV production	201	64	32
59.12 Film and TV post-production	40	9	23
59.13 Film and TV programme distribution	9	5	56
59.14 Film exhibition	30	22	73
60.20 TV programming and broadcasting	19	5	26
58.21 & 62.01/1 Development and publishing of games	22	6	27
Other	40	14	35

Source: ScreenSkills Employer Survey (2019).

Appendix D – chapter 4

Figure 79: Do you think that your workforce is reflective of diversity in the UK population? Subsectors (n = 346)

Legend: ■ Yes ■ No ■ I don't know

- Film (n = 116): Yes 39%, No 51%, I don't know 10%
- Film production (n = 38): Yes 40%, No 50%, I don't know 11%
- Film exhibition (n = 60): Yes 33%, No 57%, I don't know 10%
- Film distribution (n = 12): Yes 58%, No 25%, I don't know 17%
- High-end TV (n = 70): Yes 37%, No 51%, I don't know 11%
- Unscripted TV (n = 45): Yes 44%, No 49%, I don't know 7%
- Children's TV (n = 20): Yes 45%, No 45%, I don't know 10%
- Animation (n = 26): Yes 39%, No 54%, I don't know 8%
- VFX (n = 12): Yes 42%, No 58%, I don't know 0%
- Games (n = 31): Yes 39%, No 45%, I don't know 16%
- Other (n = 26): Yes 19%, No 65%, I don't know 15%

Source: ScreenSkills Employer Survey (2019).

Figure 80: Do you think that your workforce is reflective of diversity in the UK population? Size of the organisation (n = 346)

	Responses	No	%
Not specified	5	0	0
1 – 4 employees	92	53	58
5 – 49 employees	172	82	48
50 – 249 employees	45	23	51
250+ employees	27	17	63

Source: ScreenSkills Employer Survey (2019).

Figure 81: Do you think that your workforce is reflective of diversity in the UK population? Regions and nations (n = 346)

	Responses	No	%
East of England	5	1	20
East Midlands	7	6	86
West Midlands	13	8	62
London	135	65	48
North East	6	5	83
North West	24	10	42
South East	30	14	47
South West	32	14	44
Yorkshire & Humber	18	11	61
Northern Ireland	21	10	48
Scotland	37	22	60
Wales	17	12	71
Outside the UK	2	1	50

Source: ScreenSkills Employer Survey (2019).

Figure 82: Do you think that your workforce is reflective of diversity in the UK population? Main SIC code activity (n = 346)

	Responses	No	%
59.11 Film and TV production	157	82	52
59.12 Film and TV post-production	37	23	62
59.13 Film and TV programme distribution	12	3	25
59.14 Film exhibition	62	35	57
60.20 TV programming and broadcasting	18	6	33
58.21 & 62.01/1 Development and publishing of games	29	13	45
Other	31	16	52

Source: ScreenSkills Employer Survey (2019).

Figure 83: Do you have a formal diversity monitoring system in place? Regions and nations (n = 346)

	Responses	Yes	%
East of England	5	3	60
East Midlands	7	2	29
West Midlands	13	7	54
London	135	65	48
North East	6	2	33
North West	24	13	54
South East	30	12	40
South West	31	17	55
Yorkshire & Humber	18	9	50
Northern Ireland	21	16	76
Scotland	37	22	60
Wales	17	10	59
Outside the UK	2	2	100

Source: ScreenSkills Employer Survey (2019).

Figure 84: Do you have a formal diversity monitoring system in place? Main SIC code activity (n = 346)

	Responses	Yes	%
59.11 Film and TV production	157	95	61
59.12 Film and TV post-production	37	11	30
59.13 Film and TV programme distribution	12	2	17
59.14 Film exhibition	62	36	58
60.20 TV programming and broadcasting	18	12	67
58.21 & 62.01/1 Development and publishing of games	29	9	31
Other	31	15	48

Source: ScreenSkills Employer Survey (2019).

Figure 85: How do you think diversity in your organisation will change in the next three years? Size of the organisation (n = 418)

	Responses	Improve	%
Not specified	10	4	40
Sole traders	72	37	51
1 – 4 employees	92	54	59
5 – 49 employees	172	117	68
50 – 249 employees	45	25	56
250+ employees	27	17	63

Source: ScreenSkills Employer Survey (2019).

Figure 86: How do you think diversity in your organisation will change in the next three years? Main SIC code activity (n = 418)

	Responses	Improve	%
59.11 Film and TV production	205	152	74
59.12 Film and TV post-production	41	21	51
59.13 Film and TV programme distribution	12	5	42
59.14 Film exhibition	64	32	50
60.20 TV programming and broadcasting	21	11	52
58.21 & 62.01/1 Development and publishing of games	31	18	58
Other	44	17	39

Source: ScreenSkills Employer Survey (2019).

Appendix E – chapter 5

Figure 87: Has your organisation recruited anyone (including freelancers) in the last 12 months? Subsector (n = 418)

	Responses	Yes	%
Film	158	114	72
- Film production	71	49	69
- Film exhibition	62	48	77
- Film distribution	12	10	83
High-end TV	80	64	80
Unscripted TV	53	50	94
Children's TV	22	19	86
Animation	29	22	76
VFX	12	11	92
Games	33	27	82
Other	31	21	68

Source: ScreenSkills Employer Survey (2019).

Figure 88: Has your organisation recruited anyone (including freelancers) in the last 12 months? Size of the organisation (n = 418)

	Responses	Yes	%
Not specified	10	7	70
Sole traders	72	33	46
1 – 4 employees	92	71	77
5 – 49 employees	172	152	88
50 – 249 employees	45	41	91
250+ employees	27	24	89

Source: ScreenSkills Employer Survey (2019).

Figure 89: Has your organisation recruited anyone (including freelancers) in the last 12 months? Regions and nations (n = 418)

	Responses	Yes	%
East of England	5	4	80
East Midlands	8	7	88
West Midlands	14	8	57
London	164	136	83
North East	12	7	58
North West	29	25	86
South East	38	26	68
South West	36	26	72
Yorkshire & Humber	21	17	81
Northern Ireland	24	22	92
Scotland	42	35	83
Wales	22	13	59
Outside the UK	3	2	67

Source: ScreenSkills Employer Survey (2019).

Figure 90: Has your organisation recruited anyone (including freelancers) in the last 12 months?
Main SIC code activity (n = 418)

	Responses	Yes	%
59.11 Film and TV production	205	164	80
59.12 Film and TV post-production	41	36	88
59.13 Film and TV programme distribution	12	10	83
59.14 Film exhibition	64	49	77
60.20 TV programming and broadcasting	21	16	76
58.21 & 62.01/1 Development and publishing of games	31	26	84
Other	44	27	61

Source: ScreenSkills Employer Survey (2019).

Figure 91: In the last 12 months, was it difficult to recruit for any particular job roles? Subsector (n = 329)

	Responses	Yes	%
Film	114	43	38
- Film production	49	23	47
- Film exhibition	48	17	35
- Film distribution	10	1	10
High-end TV	66	25	38
Unscripted TV	50	18	36
Children's TV	18	8	44
Animation	22	14	64
VFX	11	7	64
Games	27	16	59
Other	21	7	33

Source: ScreenSkills Employer Survey (2019).

Figure 92: In the last 12 months, was it difficult to recruit for any particular job roles?
Size of the organisation (n = 329)

	Responses	Improve	%
Not specified	8	-	-
Sole traders	34	14	41
1 – 4 employees	72	30	42
5 – 49 employees	152	58	38
50 – 249 employees	40	21	53
250+ employees	25	16	64

Source: ScreenSkills Employer Survey (2019).

Figure 93: In the last 12 months, was it difficult to recruit for any particular job roles?
Main SIC code activity (n = 329)

	Responses	Improve	%
59.11 Film and TV production	165	72	44
59.12 Film and TV post-production	36	16	44
59.13 Film and TV programme distribution	10	1	10
59.14 Film exhibition	49	18	37
60.20 TV programming and broadcasting	16	5	31
58.21 & 62.01/1 Development and publishing of games	26	15	58
Other	27	11	41

Source: ScreenSkills Employer Survey (2019).

Figure 94: Recruitment difficulties

	Did not try to recruit	No recruitment difficulties (among those who recruited)	Recruitment difficulties (among those who recruited)
	%	%	%
All	17	56	38
59.11 Film and TV production	18	52	44
59.12 Film and TV post-production	10	56	44
59.13 Film and TV programme distribution	17	80	10
59.14 Film exhibition	17	63	37
60.20 TV programming and broadcasting	10	23	31
58.21 & 62.01/1 Development and publishing of games	16	39	58
Other	27	44	41

Source: ScreenSkills Employer Survey (2019).

Figure 95: Are there any skills gaps among your existing workforce or the freelancers you work with? (n = 418)

	Responses	Yes	%
59.11 Film and TV production	205	78	38
59.12 Film and TV post-production	41	14	34
59.13 Film and TV programme distribution	12	3	25
59.14 Film exhibition	64	16	25
60.20 TV programming and broadcasting	21	11	52
58.21 & 62.01/1 Development and publishing of games	31	12	39
Other	44	12	27

Appendix F – chapter 6

Figure 96: Do you think your organisation is providing enough training to deal with future skills needs? Subsectors (n = 248)

	Responses	Yes	%
Film	90	54	60
- Film production	31	18	58
- Film exhibition	46	32	70
- Film distribution	7	3	43
High-end TV	53	28	53
Unscripted TV	38	19	50
Children's TV	15	8	53
Animation	14	6	43
VFX	8	4	50
Games	16	14	88
Other	14	5	36

Source: ScreenSkills Employer Survey (2019).

Figure 97: Do you think your organisation is providing enough training to deal with future skills needs? Size of the organisation (n = 248)

	Responses	Yes	%
Not specified	7	3	57
Sole trader	19	7	37
1 – 4 employees	32	19	51
5 – 49 employees	123	77	63
50 – 249 employees	38	21	55
250+ employees	24	10	42

Source: ScreenSkills Employer Survey (2019).

Figure 98: Do you think your organisation is providing enough training to deal with future skills needs? Regions and nations (n = 248)

	Responses	Yes	%
East of England	3	2	67
East Midlands	5	5	100
West Midlands	8	5	63
London	105	54	51
North East	7	4	57
North West	13	5	39
South East	18	12	67
South West	24	16	67
Yorkshire & Humber	11	7	64
Northern Ireland	16	10	63
Scotland	24	10	42
Wales	12	8	67
Outside the UK	2	-	-

Source: ScreenSkills Employer Survey (2019).

Figure 99: Do you think your organisation is providing enough training to deal with future skills needs? (n = 248)

	Responses	Yes	%
59.11 Film and TV production	120	58	48
59.12 Film and TV post-production	27	19	70
59.13 Film and TV programme distribution	7	3	43
59.14 Film exhibition	47	32	68
60.20 TV programming and broadcasting	11	4	36
58.21 & 62.01/1 Development and publishing of games	13	11	85
Other	23	11	48

Source: ScreenSkills Employer Survey (2019).

Figure 100: Do you plan to arrange more training for your workforce (payroll and freelance) over the next 12 months? Subsectors (n = 248)

	Responses	Yes	%
Film	90	69	77
- Film production	31	21	68
- Film exhibition	46	36	78
- Film distribution	7	6	86
High-end TV	53	39	74
Unscripted TV	38	29	76
Children's TV	15	13	87
Animation	14	11	79
VFX	8	8	100
Games	16	16	100
Other	14	8	57

Source: ScreenSkills Employer Survey (2019).

Figure 101: Do you plan to arrange more training for your workforce (payroll and freelance) over the next 12 months? Size of the organisation (n = 248)

	Responses	Yes	%
Not specified	7	2	29
Soletrader	19	10	53
1 – 4 employees	37	26	70
5 – 49 employees	123	101	82
50 – 249 employees	38	32	84
250+ employees	26	20	83

Source: ScreenSkills Employer Survey (2019).

Figure 102: Do you plan to arrange more training for your workforce (payroll and freelance) over the next 12 months? Regions and nations (n = 248)

	Responses	Yes	%
East of England	3	3	100
East Midlands	5	4	80
West Midlands	8	8	100
London	105	81	77
North East	7	6	86
North West	13	10	77
South East	18	16	89
South West	24	15	63
Yorkshire & Humber	11	9	82
Northern Ireland	16	9	56
Scotland	24	22	92
Wales	12	8	67
Outside the UK	2	2	100

Source: ScreenSkills Employer Survey (2019).

Figure 103: Do you plan to arrange more training for your workforce (payroll and freelance) over the next 12 months? (n = 248)

	Responses	Yes	%
59.11 Film and TV production	120	89	74
59.12 Film and TV post-production	27	21	78
59.13 Film and TV programme distribution	7	6	86
59.14 Film exhibition	47	37	79
60.20 TV programming and broadcasting	11	8	73
58.21 & 62.01/1 Development and publishing of games	13	13	100
Other	23	19	83

Source: ScreenSkills Employer Survey (2019).

Appendix G – Regional disparities

Figure 104: Do you think that disparities between London/South East and the rest of the UK nations and regions will improve in the next three years? Subsectors (n = 418)

	Respondents	Yes	%
Film	158	40	25
- Film production	71	21	30
- Film exhibition	62	12	19
- Film distribution	12	3	25
High-end TV	80	37	46
Unscripted TV	53	31	59
Children's TV	22	6	27
Animation	29	9	31
VFX	12	4	33
Games	33	6	18
Other	31	5	16

Source: ScreenSkills Employer Survey (2019).

Figure 105: Do you think that disparities between London/South East and the rest of the UK nations and regions will improve in the next three years? Size of the organisation (n = 418)

	Responses	Yes	%
Not specified	10	1	10
Sole trader	72	17	24
1 – 4 employees	92	35	38
5 – 49 employees	172	54	31
50 – 249 employees	45	16	36
250+ employees	27	11	41

Source: ScreenSkills Employer Survey (2019).

Figure 106: Do you think that disparities between London/South East and the rest of the UK nations and regions will improve in the next three years? Regions and nations (n = 418)

	Responses	Yes	%
East of England	5	2	40
East Midlands	8	2	25
West Midlands	14	4	29
London	164	68	42
North East	12	2	17
North West	29	7	24
South East	38	9	24
South West	36	12	33
Yorkshire & Humber	21	9	43
Northern Ireland	24	6	25
Scotland	42	13	31
Wales	22	4	18
Outside the UK	3	0	0

Source: ScreenSkills Employer Survey (2019).

Figure 107: Do you think that disparities between London/South East and the rest of the UK nations and regions will improve in the next three years? Main SIC code activity (n = 418)

	Responses	Yes	%
59.11 Film and TV production	205	86	42
59.12 Film and TV post-production	41	14	34
59.13 Film and TV programme distribution	12	3	25
59.14 Film exhibition	64	12	19
60.20 TV programming and broadcasting	21	5	24
58.21 & 62.01/1 Development and publishing of games	31	7	23
Other	44	11	25

Source: ScreenSkills Employer Survey (2019).