



Film Sector – Labour Market Intelligence Digest

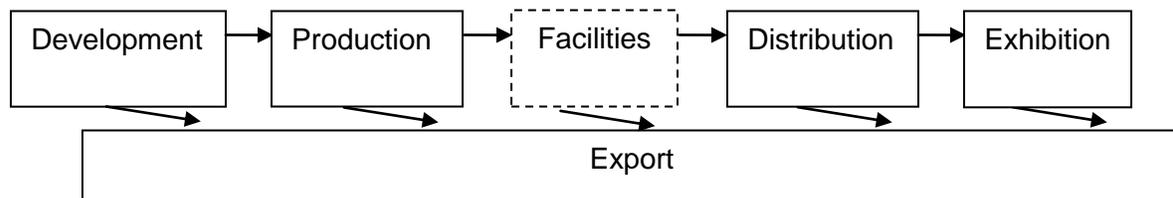
Background

Labour market data provided by the Office for National Statistics (ONS) do not provide the sectoral detail required by the Creative Media Industry and Skillset to identify and fill skills gaps and shortages¹. As a result the industry charged Skillset in 1999 with generating Labour Market Intelligence (LMI) to a sectoral level throughout the four nations, where possible.

The LMI presented in this Digest are a summary of those generated through Skillset's comprehensive research programme. The full reports for each source and more information about Skillset's research programme can be found by visiting www.skillset.org/research.

Size of Film Sector²

The film industry consists of the following six sub-sectors, which have been arranged to illustrate the cycle in which they operate:



Where available this profile includes labour market information for all film sub-sectors apart from development and export, for which little data exist, and facilities (post production, special physical effects, studio and equipment hire, processing laboratories and other services for film and television) which operate across film and television, and for which a separate labour market profile has been produced.

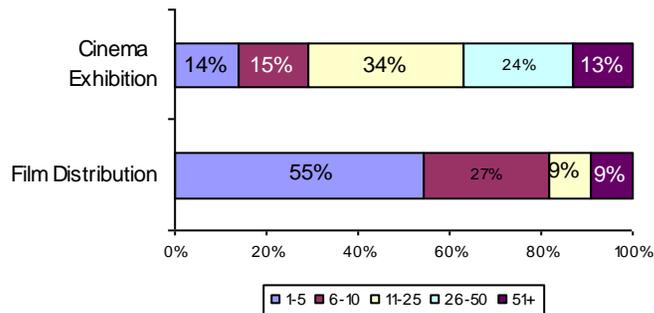
There are around **550** permanent companies in the film industry but this can fluctuate depending on the number of productions that are being worked on at any time. Of the permanent companies around 55% are production, 18% are distributors and the remaining 27% are cinema exhibition companies.

¹ This is in part due to the way in which industries in the UK's economy are classified e.g. TV and radio are combined and cannot be disaggregated, and freelancers are systematically excluded.

² Until otherwise specified, data for Cinema Exhibition, Film Distribution and Film Production employees are taken from Skillset's 2009 Employment Census, which excludes film production freelancers, photo imaging, publishing and freelancers not working on Census Day. Data for film production freelancers are taken from secondary analysis of unit lists for feature (defined here as 80 minutes or longer duration and minimum budget of £500K) film productions involving UK based crew that were shot during 2006, and the joint Skillset/UK Film Council Second Feature Film Production Workforce Survey 2008.

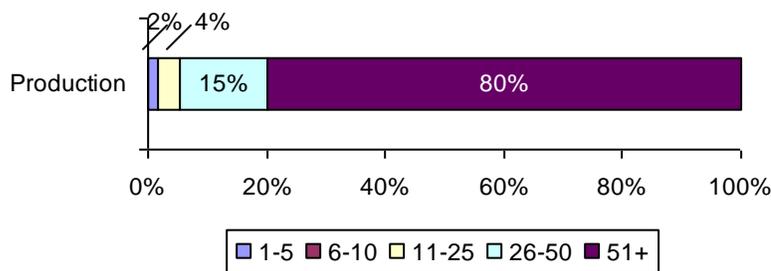
Figure 1 shows the size of film distribution and cinema exhibition companies. Within the exhibition sector there is a wider variety of company sizes and around three in ten (31%) employ between 1 and 10 people, a third (34%) employ between 11 and 25 people and two fifths (37%) employ 26 people or more. In film distribution there are more small companies and four fifths (82%) employ between 1 and 10 people.

Figure 1 Company Size by Sub-sector (Distribution and Exhibition)



As noted earlier, few film production companies are permanent and mostly they are set up for the duration of a production only. **Figure 2** below illustrates the size of the UK based workforce in a sample of 55 companies established to shoot feature film productions in 2006³. An overwhelming four fifths had more than 50 people.

Figure 2 Crew Size on Productions



Overall around 30,200 people are estimated to work in the film industry. Three fifths (59%) of the workforce is in cinema exhibition, approaching two fifths (37%) is in film production and the remaining 4% work in film distribution. As can be seen in **Figure 3**, the film workforce makes up 7% of the entire Creative Media workforce.⁴

³ Secondary analysis of unit lists for feature film productions (80 minutes or longer and minimum budget of £500K) involving UK based crew that were shot during 2006.

⁴ Data for the Creative Media industry as a whole are taken from the following sources: Skillset 2009 Employment Census, secondary analysis of unit lists for feature film productions (80 minutes or longer and minimum budget of £500K) involving UK based crew that were shot during 2006, and Labour Force Survey April - June 2009.

Figure 3 Proportion of Creative Media Workforce in Film

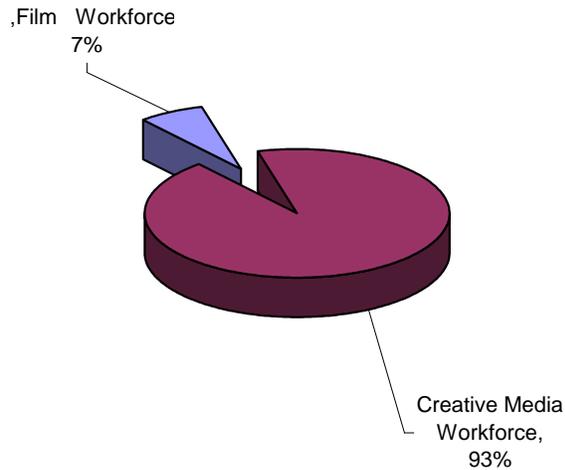


Figure 4 illustrates the distribution of the main occupations within each film sub-sector. In film production the largest occupational group is production in which 2,500 individuals work (24%), closely followed by 2,400 who work in art & design (23%). Around 1,100 (10%) work in camera/photography and 6% work in each of business management and an umbrella heading of 'other' which includes a combination of stunts, catering and other occupations not classified elsewhere.

In film distribution nearly half (46%) of the workforce are in 'distribution, sales and marketing' roles – a total of 550 individuals. A further 450 are working in strategic management roles (38%) and 200 in business management (17%).

In cinema exhibition, 13,900 individuals work in kiosk/box office roles which accounts for four fifths (79%) of the workforce. Other notable occupations in terms of numbers include projectionists and head office/team leaders/managers (both 7% of the workforce).

Figure 4 Distribution of the Film Workforce by Occupation (%)

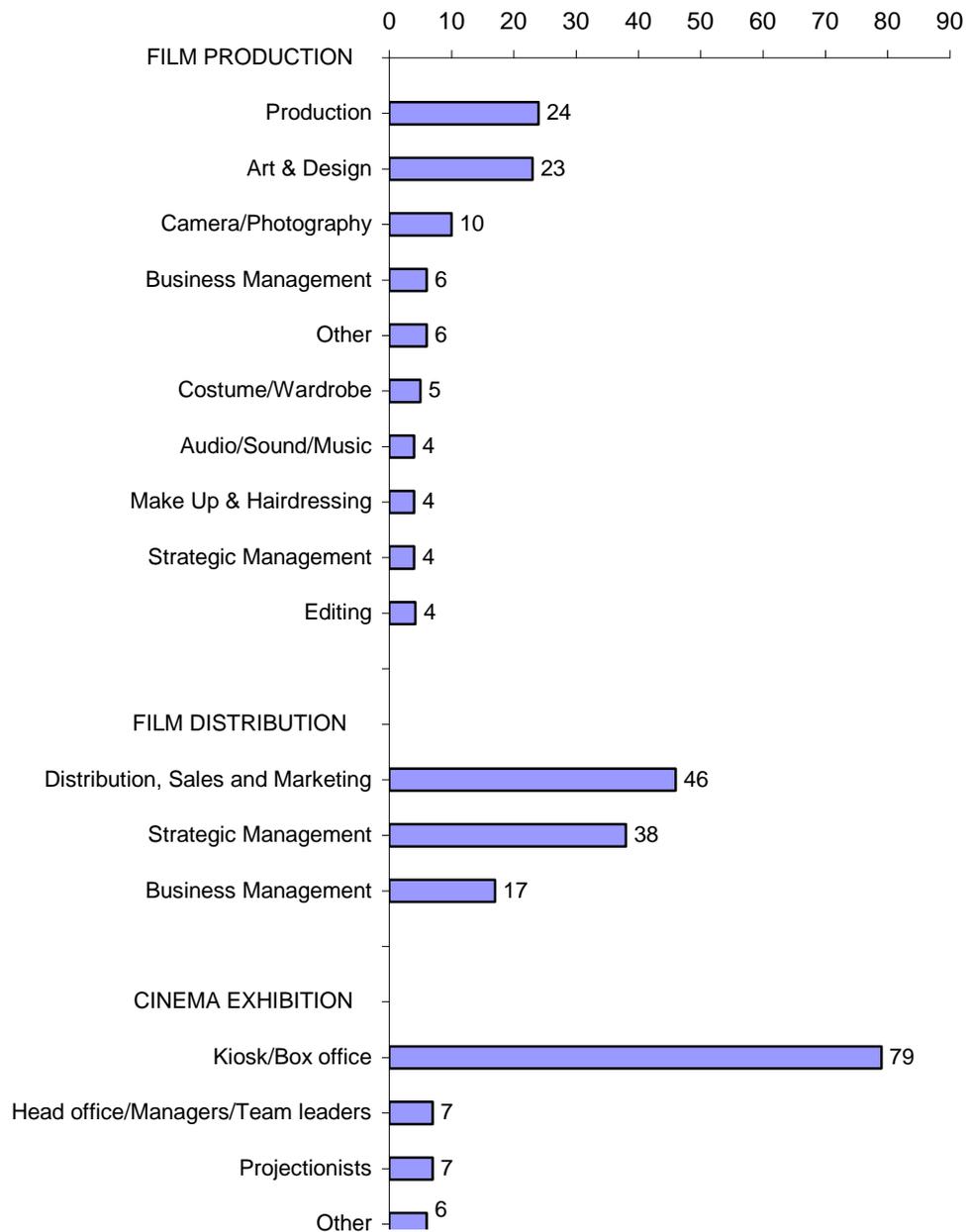
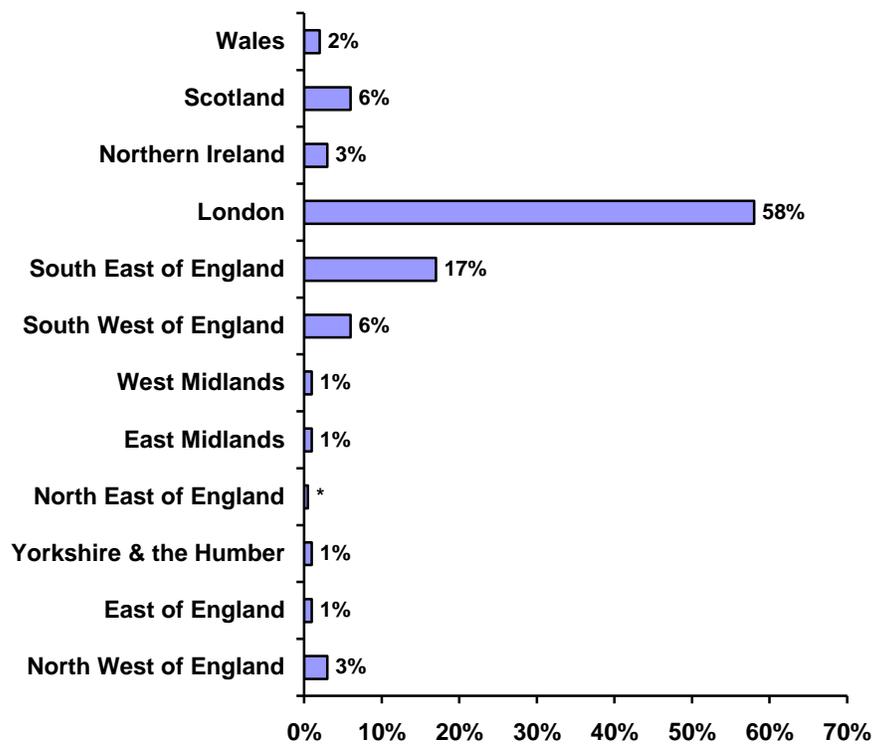


Figure 5 illustrates that around three fifths (58%) of the film production workforce work in London. A fifth of the film production crew work in the South East (17%) and they are present in each nation and English region in the UK. Likewise the film distribution workforce is also primarily London based (72%).

The cinema exhibition workforce is distributed more evenly throughout the UK, with a quarter (26%) of the workforce based in London, three fifths (62%) working in the other English regions, 8% in Scotland, 4% in Wales and less than 0.5% in Northern Ireland.

Figure 5⁵ Distribution of the Film Production Workforce by Nation/English Region



In 2007, Gross Value Added (GVA)⁶ for film, video and photography totalled £2,800 million. Although this figure is lower than the 2006 total (£3,800 million), it nonetheless represents an increase of 147% since 1997 (Annual Business Inquiry)⁷.

Shape of the Film Industry⁸

The working arrangement of the film workforce varies considerably by sub-sector; 89% of film production crew are freelance and just 11% are employees, whereas all of cinema exhibition and almost all of film distribution are employees. The working arrangement of the film production workforce has remained largely unchanged since 2005.

Overall representation of women in film stands at 41% which is similar to representation across the Creative Media industry as a whole (42%)⁹, but lower than the wider economy

⁵ Data indicating the geographical work base of the film industry are available for film production and distribution only. Film production crew do not have a permanent place of work and have therefore been given the opportunity to indicate more than one nation or English region.

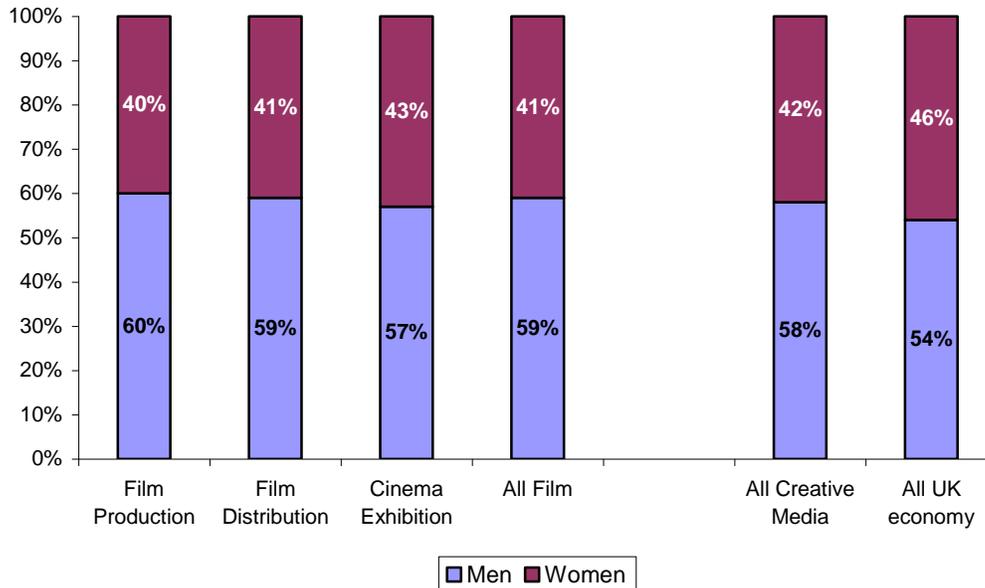
⁶ GVA is the contribution the film sector makes to UK Gross Domestic Product (GDP), and is equal to industry turnover minus the cost of inputs bought from other industries.

⁷ GVA figures from Annual Business Inquiry taken from DCMS Creative Industries Economic Estimates - February 2010.

⁸ Data for this section are taken from the Skillset Employment Census 2009, the Joint Skillset/UK Film Council Feature Film Production Workforce Survey 2008 and the Skillset Creative Media Workforce Survey 2008.

where women make up 46% of the workforce¹⁰ (**Figure 6**). Representation of women does vary slightly by sub-sector, from 40% of the film production workforce, to 41% of the film distribution workforce, and up to 43% in cinema exhibition.

Figure 6 Gender Representation in the Film Sector



The overall proportion of women in the film production workforce has increased since 2005, although this is due to improved representation in particular occupational groups, including assistant directors, art/set decorating/props and sound/electrical, rather than an increase across the board.

Over time there has been a decrease of the proportion of women in film distribution (50% of the workforce were women in 2003 and 46% in 2006), and also a slight decrease in cinema exhibition (46% women in 2002 and 45% in 2006).

Just 6% of people in the film industry are from a Black, Asian or Minority Ethnic (BAME) background. There is some variation by sub-sector. In film production one in ten (9%) of the workforce are BAME, 7% in film distribution and 4% in cinema exhibition (**Figure 7**).

There is little difference in representation when compared with the Creative Media workforce (6%)¹¹ and the economy as a whole across the UK (7%)¹². In London and

⁹ Data for the Creative Media industry as a whole is taken from the Skillset 2009 Employment Census which excludes film production freelancers, photo imaging, publishing, advertising and freelancers not working on Census Day, the Skillset/UK Film Council Feature Film Production Workforce Survey 2008, Skillset Photo Imaging Workforce Survey 2007 and LFS Apr-Jun 2009.

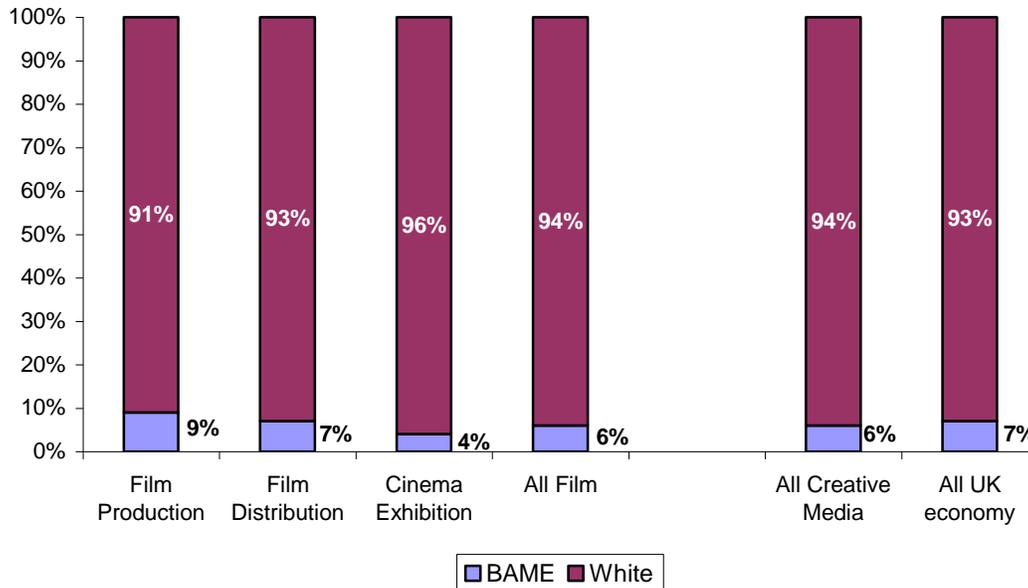
¹⁰ LFS 2004-2006

¹¹ Data for the Creative Media industry as a whole is taken from the Skillset 2009 Employment Census which excludes film production freelancers, photo imaging, publishing, advertising and freelancers not working on Census Day, the Skillset/UK Film Council Feature Film Production Workforce Survey 2008, Skillset Photo Imaging Workforce Survey 2007 and LFS Apr-Jun 2009.

¹² Labour Force Survey First Quarter 2009

across the entire economy however, where a large proportion of the film industry is based, almost a quarter (24%) of the workforce is from a BAME background.

Figure 7 Ethnic Background of the Film Sector



The proportion of people working in film production from a BAME background has increased slightly since 2005, and likewise for film distribution since 2006. There has, however, been a decline in this proportion within cinema exhibition from 12% in 2006.

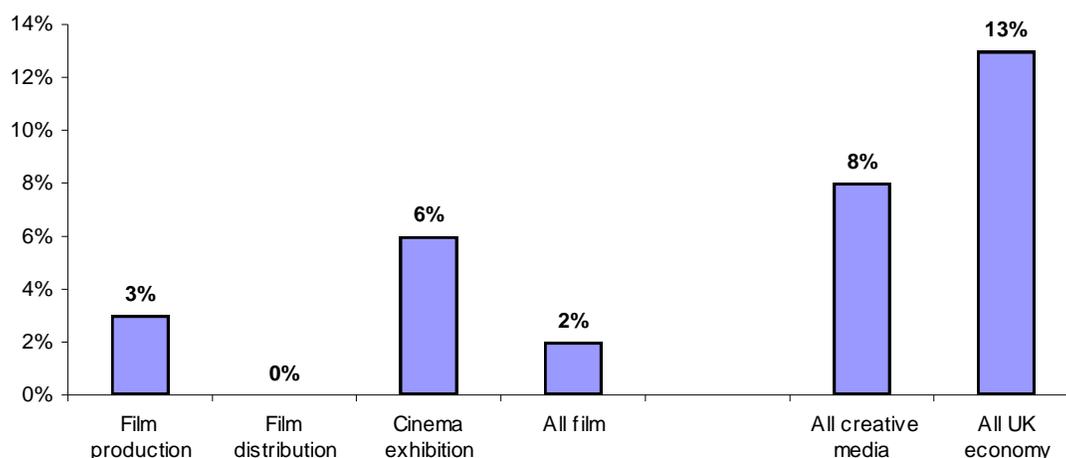
Figure 8 illustrates that 5%¹³ of the film industry is disabled as defined by the Disability Discrimination Act (DDA)¹⁴ which is a lower proportion than for the creative media industry as a whole¹⁵ and the entire economy where 8% and 13% is disabled (Labour Force Survey Historical Quarterly Supplement, autumn 2008). 3% of the film production workforce is disabled, compared with 6% in cinema exhibition, while this is true for a number too low to report for those working in distribution.

¹³ Disability data for distribution is taken from the Skillset 2009 Employment Census which relies on employers, whereas data for film production is taken from the joint Skillset/UK Film Council Second Feature Film Production Workforce Survey 2008 which relies on individuals' self-classification, as does Skillset's Creative Media Workforce Survey 2008 which provides disability data for cinema exhibition.

¹⁴ Disability, as defined by the Disability Discrimination Act (DDA), covers many people who may not usually have considered themselves disabled. It covers physical or mental impairments with long term, substantial effects on ability to perform day-to-day activities.

¹⁵ Unless specified otherwise for the remainder of this document, data pertaining to the perspective of the Creative Media workforce as a whole are taken from the Skillset Creative Media Workforce Survey 2008, joint Skillset/UK Film Council Feature Film Production Workforce Survey 2008, Skillset Photo Imaging Workforce Survey 2007 and Labour Force Survey 2005-2007 (excludes advertising).

Figure 8 Incidence of Disability in the Film Sector



The proportion of people with a disability in film production, film distribution and cinema exhibition has remained largely unchanged since 2005.

Labour market information for film production crew and the cinema exhibition workforce only is included in the remainder of this profile.

The average age of the workforce in film production is 39 years, a slightly younger profile than was the case in 2005 (when the average age was 41). The average in cinema exhibition is lower, at 29 years.

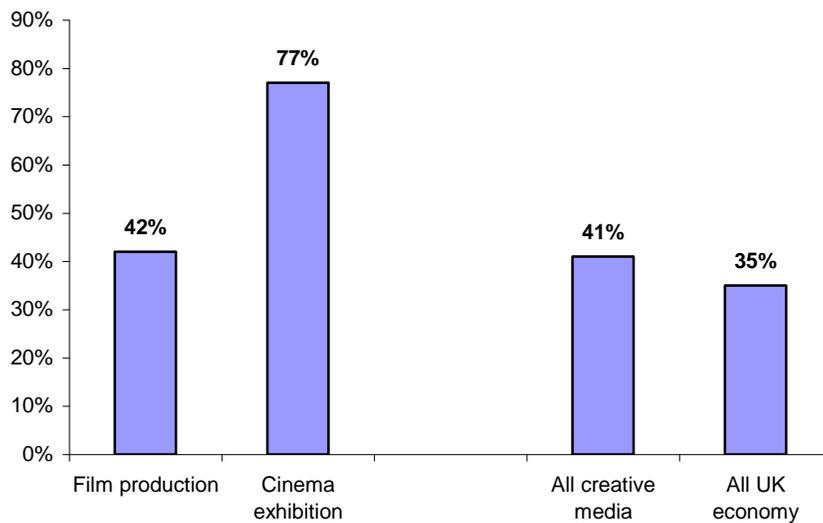
The age profile of film production crew is similar to the Creative Media industry as a whole¹⁶ and almost three fifths (58% and 59%) is 35 years or older. In contrast, the cinema exhibition workforce has a more youthful profile, with over three quarters (77%) of workers aged under 34 years.

As is the case for the Creative Media workforce¹⁷, film production crew and the cinema exhibition workforce are on average younger than the workforce across the whole economy where for example around two thirds (65%) is 35 years or older.

¹⁶ Skillset Creative Media Workforce Survey 2008, joint Skillset/UK Film Council Feature Film Production Workforce Survey 2008 and Skillset Photo Imaging Workforce Survey 2007 (excludes publishing and advertising).

¹⁷ Ibid.

Figure 9 % of the Film Sector Aged Under 35 Years



As is typical of the Creative Media industry, the age profile of women working in film production is younger than that of men (average ages are 36 and 40, respectively). However, the average age profile is identical for men and women working in cinema exhibition (the average is 29 in both cases).

Nearly three fifths (57%) of film production crew is married or living with someone as a couple, down from 61% in 2005, and the remainder are single, divorced or widowed. The marital status of the sub-sector is similar to that of the Creative Media workforce as a whole. In contrast, just over two fifths (43%) of the cinema exhibition workforce is married or living with someone as a couple.

Almost three in ten (27%) film production crew has a dependent child under 16 years living with them and under one tenth (7%) has a dependent child under 16 years not living with them. There is a much lower incidence of child dependents in the cinema exhibition sub-sector, where 13% of the workforce have a child living with them aged under 16.

The phenomenon varies by gender within film production, and more men than women have a dependent child under 16 years living with them (40% compared with 14%). The experience in film production is similar to that of the wider Creative Media workforce¹⁸ where a quarter (27%) of the workforce has a dependent child under 16 years and this is the case for more men than women (31% compared with 21%). The reverse is true for the cinema exhibition workforce, where more women (17%) than men (10%) have dependent children under 16.

By comparison, across the wider economy three fifths (62%) of the workforce has a dependent child under 16 years and this does not vary by gender.

¹⁸ Ibid.

Working Patterns and Career Development in Film

Nearly three quarters (73%) of the cinema exhibition workforce surveyed in 2008 entered the Creative Media industries after 1999, including 26% who entered in 2007/08; there is no difference between men and women in the cinema exhibition workforce.

Just over one third (36%) of the film production workforce entered the Creative Media industries after 1999; women were more likely than men to have joined in recent years: 44% of women joined since 2000 compared with 30% of men.

Over three quarters (76%) of the film production workforce had done some other audio visual work before entering the film industry, an increase over the figure reported by those working in 2005 (67%), most commonly in television (47%), film shorts (41%) and commercials (33%).

Three in ten of the cinema exhibition workforce heard of their first Creative Media job via an advertisement, a similar experience to the Creative Media workforce as a whole where 31% heard about their job this way¹⁹, Over two-fifths (43%) heard about it through more informal means (from a friend or family, or through general word of mouth), indicating the importance of informal channels, which is common to recruitment in the Creative Media industries.

A similar pattern is evident when looking at how the cinema exhibition workforce heard about their current or most recent job. 28% replied to an advertisement, while 45% heard either from a previous work colleague, friend, family member or through general word of mouth. Over one-in-five (22%) were approached directly by an employer.

The majority of the film production workforce (87%) was recruited to their latest production by word of mouth (nearly two thirds had either been approached directly by the producer or director [23%] or by their Head of Department or Supervisor [40%]). A further 20% was suggested to the production by an individual or company who had worked with them before, and 3% had been recommended by an agent or national or regional screen agency (1%). Only 1% responded to a job advertisement – far lower than the figures for the cinema exhibition workforce and the Creative Media industry as a whole. Little has changed in this pattern of recruitment methods since 2005.

The average working day on a feature is longer than in cinema exhibition. Two fifths (42%) work a 11-12 hour day on average, and almost a quarter (23%) work 13 hours on an average day. In comparison, nearly three quarters (74%) of people working in cinema exhibition work on average for between four and nine hours a day.

Over three quarters (78%) of the film production workforce work on average for 5 or 6 days a week, while 7% worked '11-day fortnights'. Nearly all (96%) of the cinema exhibition workforce work for 5 or fewer days a week on average (including 11% who work for 3 or fewer days a week).

On average, during a year long period spanning 2005 and 2006, film production crew spent 23 weeks working on feature films and 11 weeks on another type of production

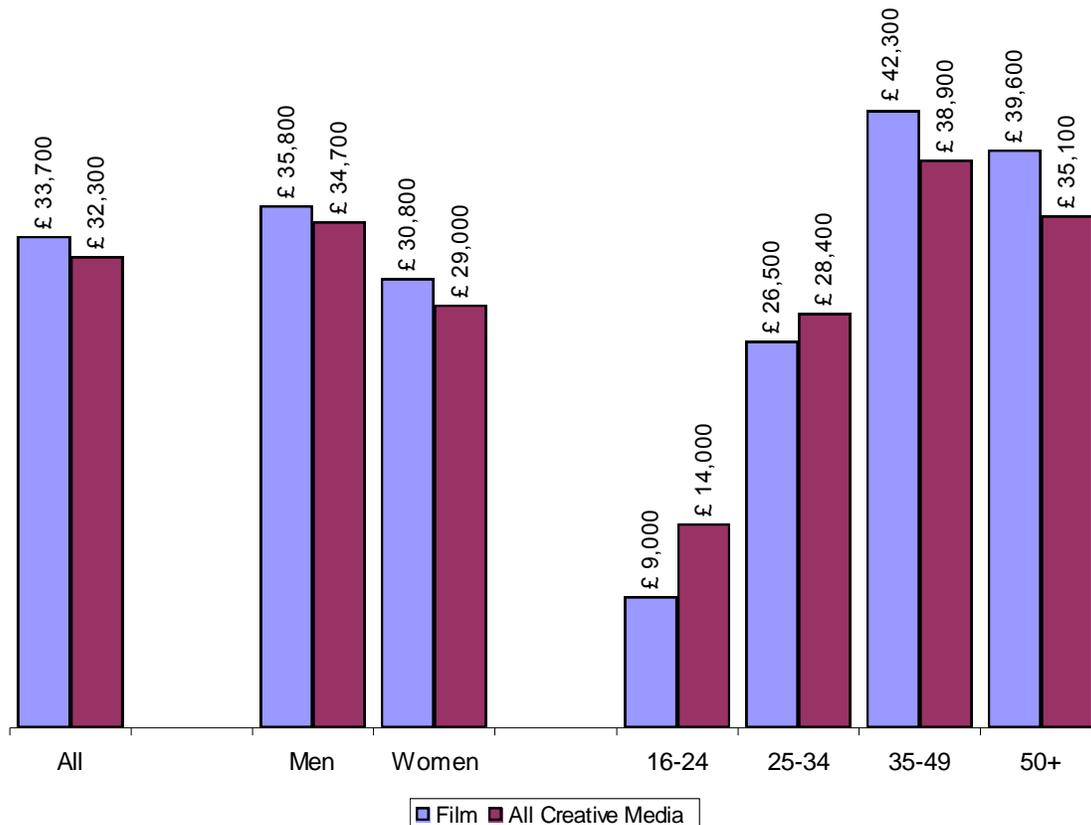
¹⁹ Ibid.

e.g. television (51% of crew) and commercials (34% of crew). In addition it is common among this segment of the economy to spend time unemployed and seeking work and three quarters (74%) of the workforce had experienced this in the same twelve months. These patterns remain largely unchanged since 2005.

As **Figure 10** below shows, film production crew earn an average gross income of £33,700, which is slightly higher than the £32,300 earned on average by the Creative Media workforce as a whole²⁰. This is lower than the average reported in 2005 (£37,300).

As is the case across the Creative Media industry as a whole, men earn more than women (£35,800 compared with £30,800) and on average income increases with age and drops slightly in the 50+ age group.

Figure 10 Mean Income of Film Production Crew Compared with the Creative Media Workforce as a Whole²¹



The cinema exhibition workforce earn an average gross income of £12,400, and over half (58%) earn less than £12K a year. Men earn more than women (£13,100 compared

²⁰ Skillsset Creative Media Workforce Survey 2008 (excludes film production freelancers, photo imaging, publishing and advertising).

²¹ Ibid.

with £11,700), and on average income increases with age (those aged 35-49 earn on average £19,400, compared to £7,500 earned by 16-24 year olds) and drops slightly in the 50+ age group (£18,300).

Just over one-in-five (22%) of the cinema exhibition workforce have ever undertaken unpaid work in the Creative Media industries. This proportion is much greater in the film production workforce, where nearly two fifths (37%) had done some unpaid work in the film industry before securing a paid job.

Nearly three in ten (27%) people working in cinema exhibition have received structured careers advice or guidance during their career, a similar proportion to the wider Creative Media workforce. This is most commonly provided by their employer (56%) and work colleagues (41%).

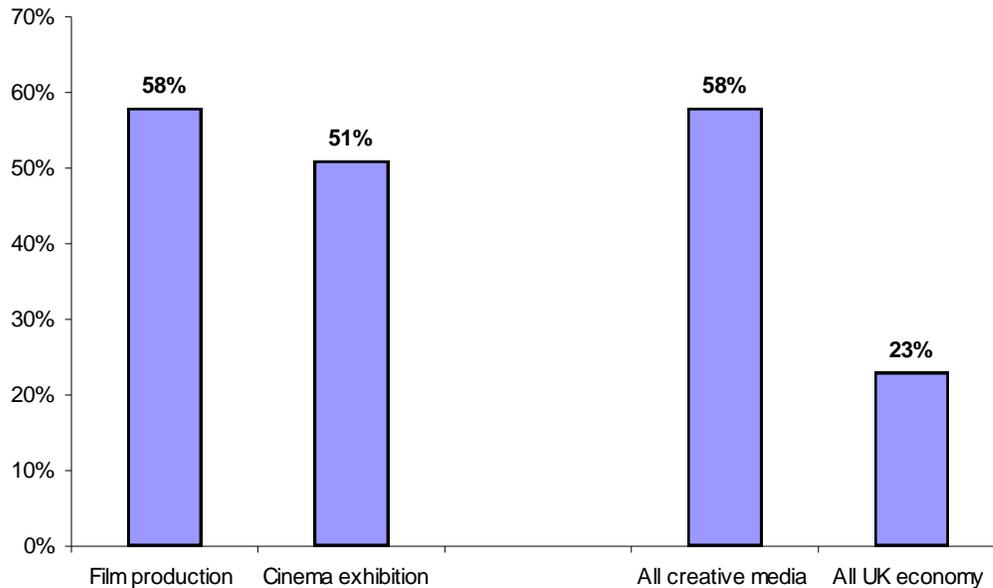
Qualifications Held in Film

The vast majority of the film production workforce (88%) holds some kind of qualification, with 60% having obtained CSE, GCSE or O level qualifications. Over half (55%) hold A levels or S levels, nearly one in five (18%) hold a BTEC, 15% hold a City and Guilds qualification and 9% hold a NVQ or SVQ.

Figure 11 shows that compared with the entire UK population of working age, 23% of whom are graduates (Labour Force Survey, Historical Quarterly Supplement, autumn 2006), film production crew are highly qualified, and nearly three fifths (58%) has a degree, which is on a par with the Creative Media industry as a whole. This is a larger proportion than in 2005, when 46% of the workforce had a degree.

The proportion of graduates is lower in the cinema exhibition workforce, at 51%. 7% of people in cinema exhibition have a technical or vocational qualification relevant to work in the industry, and 6% have another type of technical qualification.

Figure 11 % of Graduates in the Film Sector



For 15% of the film production workforce, their highest qualification is a postgraduate degree, and this is the case for 21% of the cinema exhibition workforce. For a further 43% of film production crew, their highest is an undergraduate degree or diploma, and this is the case for 30% of those working in cinema exhibition.

The highest qualification obtained varies by age in film production. Younger respondents are considerably more likely to hold a graduate level qualification than their older counterparts. Over three quarters of those aged under 35% have a graduate qualification compared with 52% aged 35-49 and 29% of those aged 50 and older.

Since 2005, there has been a marked change in the relative proportions of those with and without media-related degrees in the film production workforce. In 2005, there were more graduates with degrees in a media related subject than in other subjects, whereas the opposite is now the case. So while the proportion of graduates increased over this period, this was driven by a rise in the number of those holding non-media degrees entering the industry.

More people working in cinema exhibition have a non-media undergraduate or postgraduate degree than an equivalent media qualification, although this is likely to change as 93% of those who entered the Creative Media industries after 2000 with a degree qualification have it in a media-related subject, compared with 17% of those who entered before 2000 with a degree qualification.

In film production, more women are graduates than men (75% compared with 48%) and this is the case for more people from a Black, Asian and Minority than a white ethnic background (69% compared with 58%), and the trend decreases with age (77% under 35 years are graduates compared with 46% aged 35 and over).

In cinema exhibition, there is little difference between men and women, or those from a Black, Asian and Minority and white ethnic background in terms of holding a graduate qualification. However, those aged 25 to 34 are most likely to be graduates (65%), and the trend decreases in older age groups (58% of 35-49 year olds and 35% of those aged 50 and above).

Training Delivery in Film

Perspective of Workforce

In a twelve month period spanning 2005 and 2006 under half (45%) the film production workforce had received some training (including structured self-tuition), which is less than the three fifths (57%) of the workforce across the Creative Media industry as a whole²² during a similar period of time. The most common mode of training is structured self-tuition followed by a taught course and on-the-job. This pattern of training and learning has remained largely unchanged since 2005.

Commonly cited areas of taught training received in the same twelve months are first aid and health and safety (17%), art and design (12%), camera (12%), construction (12%) and finance, business, marketing and management (10%). A third (32%) received their taught course via a training organisation specialising in film or TV and a quarter (26%) via a training organisation not specialising in film or TV. Half fund their own training and a quarter receives funds for training from their employer.

Also in the same period, a third of film production crew had taught themselves skills in the past year without formal tuition and incidence did not vary by contract type. Commonly cited areas of training taught in this way are general computer and administration (17%), camera (16%), art and design (15%), finance and business (13%), and post production (11%).

Incidence of training received is higher in cinema exhibition. Nearly three quarters of the cinema exhibition workforce (73%) received training in the twelve month period spanning 2007 and 2008. Around one third (34%) of the workforce spent five or more days training during this period. The majority (68%) underwent on-the-job training during the year. Just under half (46%) attended a course delivered in a classroom, 12% undertook courses delivered using technology and nearly one in five (17%) did a course delivered using a combination of classroom and technology.

In most cases training is provided by the employer (75%), while a quarter of the cinema exhibition workforce attended training provided by a private company. Over half (52%) of the workforce took free training, while 46% had training paid for by their employer.

²² Skillset 2008 Survey of the Creative Media Workforce, Skillset/UK Film Council Feature Film Production Workforce Survey 2008 and Skillset Photo Imaging Workforce Survey 2007 (excludes publishing and advertising).

Training Needs in Film

Perspective of Workforce

With more than half (52%) the film production workforce citing a training need, the need for training is as high as it is for the Creative Media industry as a whole. Training is needed by more locations (73%) and camera crew (66%) than construction crew (31%); more women (57%) than men (49%); more people from a Black, Asian or Minority (70%) than a white ethnic background (51%); and more younger than older crew, for example two thirds of 16-24 year olds compared with two fifths (42%) of crew aged 35 years and older reported a training or development need.

The most commonly given reasons by film production crew for needing further training are to move on in their careers, to develop new technical skills and to keep up to date with current skills.

Common industry specific areas cited are art and design and camera, and common generic areas cited are finance and business, and general computer and administration, which are also common areas in which training has been received.

Over one quarter (26%) of those working in cinema exhibition has a training need. This is most commonly in the area of health and safety, management and leadership, projection and first aid.

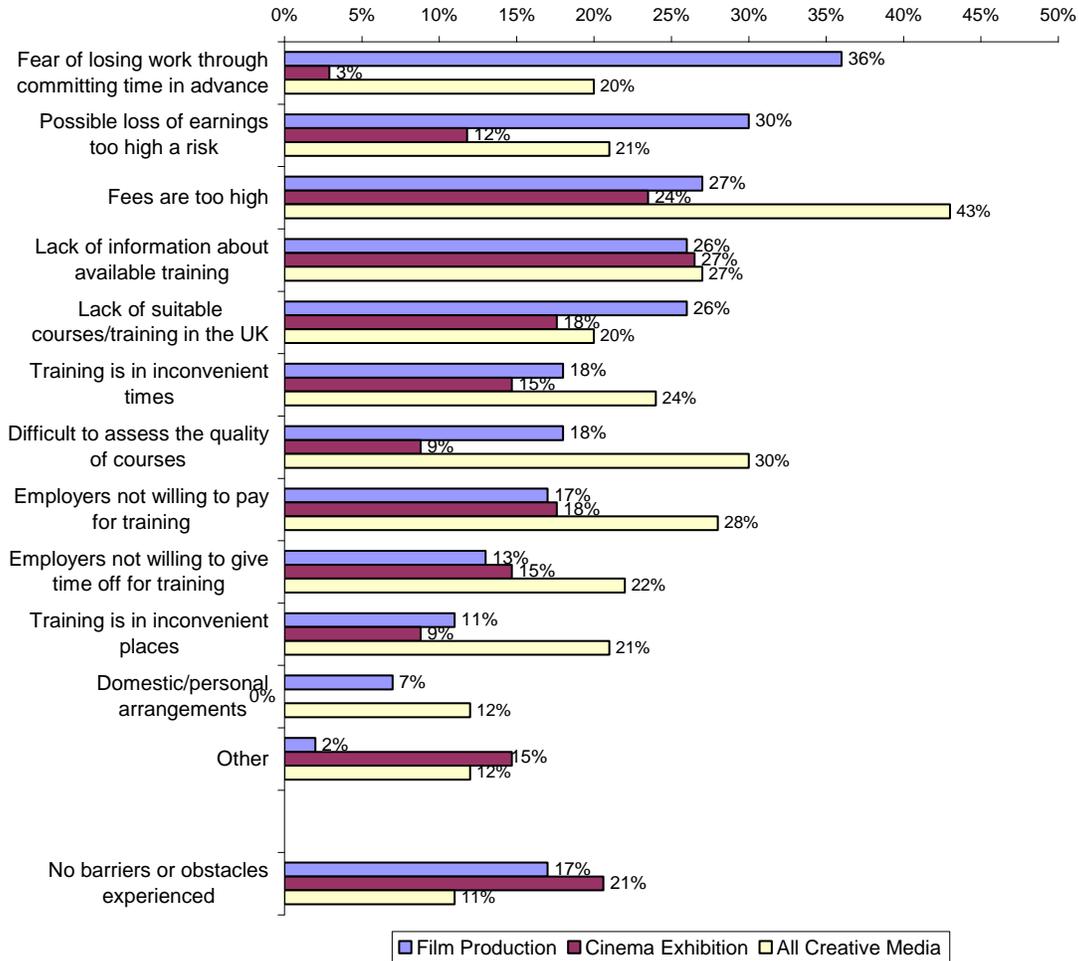
Within cinema exhibition, training is most commonly needed in the area of business skills development (cited by 19% of the workforce), management/leadership, accounting, health and safety and cinema skills (17% respectively) and training for new/digital technology (12%).

Figure 12 below illustrates that four fifths (83%) of the film production workforce have experienced barriers to accessing the training they need, which is similar to the proportion of the workforce across the Creative Media industry as a whole (88%), but much higher than was the case in 2005 (61%). Those working on a freelance basis are more likely to report difficulties (87%) compared with permanent employees (79%).

Common reasons cited by those in film production are fear of losing work through committing time in advance (36%), difficulty taking time off (34%) and possible loss of earnings (30%) whereas in the wider Creative Media industries common barriers are the expense of fees (43%), difficulty assessing the quality of courses (30%) and employers not willing to pay for the fees (28%).

The proportion of those experiencing barriers to training is lower in general in cinema exhibition, at 79%. The most common barrier in cinema exhibition is a lack of information about available training (27%), followed by lack of suitable training courses (18%) and employers not willing to pay (18%). Fear of losing work through committing time in advance was far less of a concern in cinema exhibition than in the film production workforce, probably due to the absence of freelance workers in the sub-sector.

Figure 12 Barriers to Training Experienced²³



Perspective of Employers²⁴

According to film employers key skills gaps and shortages include negotiation and diplomacy with internal colleagues and external customers, management and leadership and business skills (specifically commercial acumen, knowledge of the film value chain, finance for non finance managers).

^z Skillset 2008 Creative Media Workforce Survey, Skillset/UK Film Council Feature Film Production Workforce Survey 2008 and Skillset Photo Imaging Workforce Survey 2007(excludes publishing and advertising).

²⁴ Evidence gathered from Skillset 'Film Sector Employers: Skills Needs in Production, Distribution & Exhibition Study 2009'

In film production there is a shortage of production accountancy skills (perhaps due to low pay compared with other sectors), development executive skills particularly with insight and commercial acumen, up to date knowledge of new legal developments among location managers and commercial acumen among producers. Employers in distribution have isolated a clear gap in information management skills particularly through ICT and in exhibition there is a lack of fundraising skills and skills to develop small businesses.

A key skills gap for the future, common for the film industry, is new and digital technology and particularly managing the change from traditional to digital media. In production digital camera skills and awareness are lacking. For exhibition and distribution employers a key focus is exploiting opportunities such as online and digital sales, marketing and distribution and dealing with threats eg. file sharing.

In production an ongoing need for training is in health and safety. In addition, employers are concerned that the 2012 Olympics may reduce the availability of construction and lighting crew.

Future Research

Labour market data from Skillset's regular cycle of research will continually update this Digest, which is one of a series for each sector of the Creative Media industry. This includes data gathered on the size and shape of the industry, the demands of individuals and employers in terms of training experiences, skill gaps and shortages.

Skillset, June 2010