

2010 Employer Survey

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Key Findings

The range and impact of skills gaps and, to a lesser extent, skills shortages experienced within the Creative Media industries is a continued area of focus for employers. In addition, employers state that the provision of quality new entrants from education alongside targeted CPD for the existing workforce is paramount to ensuring the future success of Creative Media businesses.

Almost half of employers (49%) recruited a new member of staff over the past 12 months.

Demand for freelancers over this same period increased for three in 10 employers (30%), notably higher than demand for permanent employees which increased for 18% of employers. However, 24% of employers reported a decrease in the demand for freelancers and 19% in the demand for employees. Looking forward, around a quarter of employers anticipate the number of freelancers and employees will increase over the next 12 months. However, the majority of employers expect their demand for freelancers and employees to remain unchanged in the next year.

28% of Creative Media employers report a gap between the existing skills of their workforce and those needed to meet business objectives.

Interestingly medium/large businesses are significantly more likely to report a skills gap (41%) compared to micro/small businesses (27%)¹, reflecting the fact that they employ more people and probably cover a wider range of skill areas. Employers using freelancers were more likely to report skills gaps amongst their workforce (35%) than those not employing freelancers² (22%). This suggests that skills gaps may be more prevalent amongst the freelance workforce.

Employers who reported skills gaps were asked what form these took. The most common skills gap reported is in sales and marketing (61%), followed by technical skills (48%), and skills in using specific software applications (46%). Employers who identified technical skills specified computer programming and computer/software usage as the most common technical skills gaps. The size of businesses seems to have an impact on the skills gaps they experience. Skills gaps in sales and marketing were identified more frequently by micro/small employers (63%) than medium/large (41%). However, gaps in leadership and management skills were significantly more likely to be reported by medium/large employers (52%) than micro/small (39%).

Skills gaps have damaging and wide ranging effects on businesses such as delaying the development of new products/services (63% of employers), causing companies to outsource work they would prefer to keep in-house (48%), increasing operating costs (47%) and the actual loss of business to competitors (43%). However, seven in ten employers have taken actions to address the skills gaps they're experiencing. The actions most commonly

¹ Micro/small businesses = less than 50. Medium/large businesses = 50 or more

² As agreed by industry 'freelance' is defined as an individual with a contract of fewer than 365 days and an 'employee' is defined as an individual with a contract of 365 days or more. The length of time the individual has been freelancing and the mode of payment is not taken into consideration.

taken by employers are up-skilling the existing workforce (69% of employers) and increasing/expanding trainee programmes (54%).

Creative Media employers are encountering skills gaps when trying to recruit new workers direct from education.

When asked if they had found any specific skills difficult to obtain in applicants direct from education, employers cited sales and marketing skills (31% of employers), followed by leadership and management skills (27%), multi-skilling (23%) and specific software skills (22%).

Future skills gaps cited are consistent with the current gaps identified by the workforce.

Employers were asked whether they expected demand for particular skills to be difficult to meet over the next three to five years. Just over a third of employers identified sales and marketing skills as a future skills gap area (34%), followed by skills in using software packages (29%) and technical skills (25%). Within the broad area of 'technical skills' the specific future skill gap predicted most frequently was computer programming (mentioned by 7% of employers).

Creative Media professionals and new entrants from education alike need to become increasingly multifaceted.

Individuals need to prepare for being in interdisciplinary teams with a new emphasis on the fusion of skills required to be able to create content across multiple platforms whether an advertising creative or print journalist. So called diagonal thinking (i.e. the ability to think creatively and practically) will be increasingly important as creativity combined with the business skills to commercially exploit content will be critical to sector growth.

Vacancies were reported by 15% of employers in the Creative Media industries. Of these, 46% reported vacancies that are hard to fill (skills shortages).

This equates to 7% of all Creative Media employers. These hard to fill vacancies were most frequently based in distribution, sales and marketing (both 38%), technical development (27%) and business management (13%)

There is considerable variation in the reporting of vacancies by sector.

To a large extent, the likelihood of vacancies correlates with company size. For example, employers in TV (32%), radio (32%), and computer games (31%) are most likely to have vacancies at the time of the survey, as they are among the sectors with the largest establishments. Conversely, the sectors in which fewest employers report vacancies are photo imaging (6%) and film production (7%). These sectors are more likely to contain the smallest establishments and are also heavily freelance-dependent so employment vacancies may be less of an issue for them.

Mismatch of applicants' skills to the needs of the job is a common issue and experience in work is often a greater priority than academic qualifications.

Half of employers state they do not value formal qualifications, although the apparent lack of value employers place on qualifications may be attributable to a perception that qualifications do not necessarily make new recruits to the sector 'job ready'.

However, in contrast to this finding on the perception of qualifications amongst employers is the high level of graduate employment that currently exists within the Creative Media workforce; with 57% of the workforce holding a qualification that is NVQ Level 4 equivalent or higher.³ In addition, recent research by Skillset into the destination of 2007/08 graduates also suggests that the likelihood of HE graduates finding employment within the Creative Media industries within six months of graduation increases for students who have undertaken industry-specific courses, particularly those approved by Skillset.⁴

Less than half (47%) of Creative Media employers had funded or arranged learning or development for their workforce in the past 12 months.

In addition, less than a fifth (18%) had a plan that specifies the level and type of learning and development that the company will invest in over the coming year. This seems to be out of sync with workforce needs as demand for CPD amongst the Creative Media workforce is high; one in two members of the workforce declared a current need for learning and development, whilst six in ten had undertaken learning or development in the previous year.⁵

50% of employers cited barriers to the provision of more learning and development.

Of these, two in ten reported that learning and development is not considered a priority at the current time. This trend could at least be partly attributable to the recession as previous Skillset research shows that one in two Creative Media companies said their ability to deliver learning and development has been affected by the recession.⁶ However, just 12% of employers reported a decrease in their learning and development budget in the last 12 months (64% reporting no change and 16% actually reporting an increase) suggesting the impact may not have been that significant.

The proportion of employers providing learning and development over the last 12 months varies significantly by sector, ranging from 68% in radio to 34% in photo imaging.

It is highly likely that these variations are an effect of company size. As would be expected, larger employers are more likely to fund or arrange learning and development (apart from anything else they have more people to train) and the sectors where learning and development is most prevalent are those containing larger employers (for example, broadcast radio and broadcast television). Similarly, employers in these sectors are more likely to have a learning and development plan.

The survey found that less than one in ten Creative Media employers currently offer Apprenticeships (9%) though two fifths (40%) said they would consider doing so in the future.

The proportion of employers that offer apprenticeships ranges from 23% in film to just 5% in publishing. The relatively high proportion of employers willing to offer Apprenticeships in the

³ Skillset Creative Media Workforce Survey 2010 and LFS, ONS Jul 2009 – Jun 2010

⁴ 10% of employed HE graduates from 2007/08 who undertook Skillset-relevant courses found employment within Skillset industries, compared to 3% of all HE graduates who have found employment in Skillset industries. This increased to 34% for employed HE graduates of Skillset-accredited courses. DLHE Survey, HESA 2007/08 from Skillset/Research As Evidence (October, 2010)

⁵ Creative Media Workforce Survey, Skillset (2010)

⁶ From Recession to Recovery, Skillset (2009). Based on a sample of 262 employers.

future is encouraging as this is a clear priority area for the Coalition Government and more resources are being invested in the development of Apprenticeships.⁷

⁷ www.hm-treasury.gov.uk/spend_sr2010_speech.htm

1 Executive Summary

Skillset is the Sector Skills Council for the Creative Media Industries, representing 14 sectors. At the heart of the Creative Industries, the Creative Media sector includes employers involved in: Advertising, Textiles, Fashion, Film, Television, Radio, Photo Imaging, Interactive Media, Publishing, Animation, Content for Computer Games, Commercials and Promos, Corporate Production and Facilities.

The Advertising and Fashion and Textiles sectors became part of Skillset's footprint shortly before the inception of the survey and were excluded from the sample due to the recency of that development.

Skillset operates a comprehensive, industry endorsed programme of research to understand the size and shape of the Creative Media Industries, their skills needs and training provision. The Creative Media Employer Survey provides essential labour market intelligence on employers' recruitment issues, current and future skills needs, qualifications, and learning and development activities.

Profile of Respondents

- Skillset's footprint comprises an estimated 33,252 employers. The two largest main sectors are Publishing, comprising 9,715 employers and Photo Imaging, consisting of 8,665. Between them, these two sectors now represent well over half of all employers within Skillset's remit. The third largest main sector is Interactive Media (7,458 employers). The combined sectors of Film, Television and Radio account for 2,623 employers – representing 10% of the footprint.
- Nearly half of all employers are based either in London or the South East, with a fairly even spread throughout the rest of the UK. Some sectors however, remain very much London-centric – 71% of employers in Broadcast Television are based in London, and 63% of those in Film Production.
- Nearly three quarters (73%) of employers are micro-businesses (employing 1-10 people), one fifth (19%) are small employers (11-50 people), and the remaining 8% are medium-large employers employing in excess of fifty people. The proportion of medium-large employers is much higher in some sectors – for example, 43% in Broadcast Television and 28% in Broadcast Radio.
- The majority (56%) of employers have existed for ten years or more, and the remaining 44% for less than ten years. The proportion of older employers is much lower in some sectors however – comparatively only 36% of those in Other Interactive Media, and 40% of those in both Online Content and Computer Games have been around for ten years or more.

- Nearly half of respondents (48%) employ people on short term contracts, but this is over three quarters in Independent Production for Television (85%), Film Production (82%), Broadcast Television (80%), and Computer Games (77%).⁸

Recruitment

- Nearly half (49%) of employers have taken on new recruits in the year leading up to the survey. Employers in Publishing (46%), and especially Photo Imaging (30%) are less likely than average to have done so, and those in Television (76%) and Animation (71%) more likely.
- Nearly half (45%) of employers say they have recruited directly from education, 41% from outside the Creative Media Industries, and 28% from within the Creative Media Industries.
- Employers who had recruited direct from education were asked whether they had found any specific skills difficult to obtain in applicants. The most common skill area cited is sales and marketing (31% of employers), followed by leadership and management skills (27%), multi-skilling (23%) and specific software skills (22%).
- 30% of employers say their demand for people employed on short term contracts has increased over the past year compared to just 18% for permanent employees.
- At the time of the survey, 15% of employers report having vacancies. This proportion is much higher in sectors comprising a greater number of large employers, such as Broadcast Television (49%), and Broadcast Radio (40%).
- Nearly half of employers with vacancies (46%) say that some of them are hard to fill. Around three quarters of these employers have taken action in response, in most cases around exploring new recruitment channels or approaches rather than offering higher salaries or recruiting from overseas.

Current Skill Needs

- 28% of employers reported skills gaps at the time of the survey. This was far higher among employers in Film and Television, and to a lesser extent within Radio. A lower than average percentage of all employers within Publishing and Photo Imaging report skills gaps, with the exception of Other Publishing.
- The most common skills gap reported by employers is in sales and marketing (61%), followed by technical skills (48%), and skills in using specific software applications (46%).

⁸ 'Short term contract' = contract of less than 365 days and 'employee' = contract of 365 days or more.

- The most common causes of skills gaps are a lack of experience or individuals having been recruited recently, cited by 24%, failure to train and develop staff (21%), and recruitment problems (20%).
- The most common effect of skills gaps is delays to developing new products or services, reported by 63%, followed by outsourcing work that would preferably be done in-house (48%), increased operating costs (47%), and losing business or orders to competitors (43%). Only 11% of employers say their skills gaps have not caused any problems.
- Nearly three quarters (72%) of employers experiencing skills gaps have taken action to address them. The most common type of intervention reported is skilling up the current workforce, reported by 69% of employers. 54% of employers report increasing or expanding trainee programmes and 40% redefining existing jobs.

Future Skill Needs

- Just over a quarter (26%) of employers say they expect the number of permanent employees in their company to increase over the next twelve months. Two thirds expect it to stay the same and just 4% think it will decrease.
- Employers in the Interactive Media and Games sectors were more likely to expect the number of employees to increase – 41% of Online Content employers, 51% of Other Interactive Media employers, and 44% of Computer Games.
- At the other end of the spectrum, all sectors within Publishing and Photo Imaging contain lower than average proportions of employers expecting numbers of permanent employees to increase.
- Overall, employers predict a similar level of demand for people on short term contracts, with nearly a quarter (24%) anticipating an increase, nearly two thirds (65%) no change and 5% a decrease.
- Employers were asked in which skill areas they thought demand may be hard to meet in three to five years. The most common area cited is sales and marketing (34%), followed by skills using specific software applications (29%), technical skills (25%), multi-skilling (24%), and leadership and management skills (22%).

Education and Qualifications

- Exactly half of employers say that they value formal qualifications. This was highest in Broadcast Television (73%) and Publishing of Newspapers (69%).
- By some margin, the qualification valued by most employers is an undergraduate degree (25%). Technical or vocational qualifications are valued by 15% of employers, and postgraduate degrees by 9%.

- Sectors in which most employers prefer media or related qualifications include Animation (66%), Publishing of Newspapers (64%), and Photographic Activity (60%).

Learning and Development

- Just under one in five (18%) employers have a plan that specifies the level and type of learning and development in which they will invest over the coming year, this is highest in Broadcast Television (52%), Community Radio (40%) and Broadcast Radio (38%).
- Provision of training plans correlates positively with company size – 44% of medium-large employers have one, 34% of small employers, and 13% of micro-businesses.
- The majority of employers (63%) have experienced no change in their learning and development budget over the past twelve months; 16% report an increase and 12% a decrease.
- Nearly half of employers (47%) say they have funded or arranged learning or development over the past twelve months.
- The highest proportions of employers having funded or arranged learning and development are to be found in Broadcast Radio (77%) and Broadcast Television (69%). The lowest are found in Other Photo Imaging and Photographic Activity (32% and 36%). It is highly likely that many of the sectoral variations are an effect of company size, as larger employers within these sectors are also more likely to have provided training.
- To a large extent, the areas in which training has been delivered reflect those which were previously identified in the survey as skills gaps, such as specific software skills, sales and marketing, and leadership and management.
- The most common mode of delivery is sending employees to external courses or seminars, reported by 68% of employers, followed by structured support on the job, such as coaching or mentoring (58%), and ad hoc support on the job (52%).
- 59% of employers who have provided learning and development over the past year reported that they also make this available to people on short term contracts.
- When asked about barriers to providing learning and development over half of employers (54%) say they cannot afford to invest in training, 41% that there is not enough time, and 38% state that it is because their employees are already proficient. Around a third said that learning and development is not a priority for their business at the time of the survey.
- 9% of employers offer apprenticeships and a further 50% say that they would consider offering them in the future; 18% offer graduate internships and 36% say they would consider doing so; and nearly half (49%) of employers offer work experience, while a further quarter (25%) would consider offering them.

- 81% of medium-large enterprises operate work placement/experience schemes, 63% of small businesses, and 44% of micro-businesses. The same pattern exists for graduate internships (54%, 34% and 12% respectively) and apprenticeships (25%, 18% and 6% respectively).

2 Introduction

Skillset is the Creative Industries' Sector Skills Council, representing the following sectors:

- Advertising
- Animation
- Computer Games
- Facilities (which includes post production, studio and equipment hire, special physical effects, outside broadcast, processing laboratories, transmission, manufacture of AV equipment and other services for Film and TV)
- Fashion and Textiles
- Film
- Interactive Media
- Photo Imaging
- Publishing (books, journals, magazines, newspapers, directories and databases, news agencies, and electronic information services)
- Radio
- Television

Advertising and fashion and textiles had recently come within Skillset's footprint at the point of inception of the survey and are excluded due to the recency of that development.

Exploratory research is currently underway to identify how best to incorporate both of those sectors into Skillset's core research programme.

Background

In 1989 the Institute of Manpower Studies carried out a groundbreaking study on the audio visual labour market. For the first time this study identified the industries' increasing reliance on a highly skilled freelance labour force. This research was instrumental in identifying the need for an interventionist body to address the skills development needs of this segment of the workforce. Since it was established, Skillset has developed a regular cycle of labour market intelligence gathering to build on this initial research. Skillset's core research programme now consists of three approaches to gathering labour market data:

- 1) A biennial Census of employers to obtain employment estimates in each sector and occupation and nation and English region broken down by contract type, gender, ethnicity and disability.
- 2) Employer research to obtain detailed information from the perspective of the employer on skill gaps and shortages.
- 3) Surveys of the workforce in order to provide the perspective of the individual on employment patterns and training and skills development needs.

This survey is part of the second series of surveys. It was carried out concurrently with a major cross-sector workforce survey forming a key element of the third series of surveys.

Copies of all other Skillset research reports can be downloaded at www.skillset.org/research/index

Aims and Objectives of the Survey

The goal of this survey is to add to Skillset's existing portfolio of labour market intelligence on the Creative Media Industries. In particular, the aim is to gather accurate intelligence on recruitment issues, current and future skill needs, qualifications and learning and development. This is intended to serve a number of purposes including the following:

- Information on current recruitment problems to inform public training policy;
- Intelligence on skill shortages and strengths to help ensure effectively targeted investment and interventions;
- Information on perceptions of qualifications to help inform public education policy to best meet industry need;
- Analysis of employers' awareness of Skillset products and services to help Skillset to tailor its offer to meet industry demand as effectively as possible.

Scope, Methodology and Sampling

The scope of the survey is all employers working in the sectors listed below:

- Animation
- Computer Games
- Facilities (which includes Post Production, studio and equipment hire, special physical effects, outside broadcast, processing laboratories, transmission, manufacture of AV equipment and other services for Film and TV)
- Film Distribution
- Film Exhibition
- Film Production
- Interactive Media
- Other Content Creation (pop promos, corporate and Commercials production)
- Photo Imaging
- Publishing (books, journals, magazines, newspapers, directories and databases, news agencies, and electronic information services)
- Radio
- Television

As already noted above, the survey did not include employers operating in the sectors of Advertising or Fashion and Textiles.

The fieldwork took place between June – September 2010, primarily by way of a telephone survey of employers known to be operating in any of the sectors in scope, with a follow-up approach to employers in some sectors to complete the survey online during the later stages of the fieldwork. The sample frame was compiled by collating a comprehensive company database from relevant directories, databases and trade association memberships. A full list of organisations that supported both this process and the promotion and promulgation of the survey is listed in **Figure 2.1**.

Figure 2.1 Supporting Organisations

Association of Studio & Production Equipment Companies (ASPEC)	Independent Publishers Guild
Association of Imaging Professionals (AIP)	International Visual Communications Association (IVCA)
Association of Learned and Professional Society Publishers (ALPS)	Manchester Digital
Association of Online Publishers (AOP)	Master Photographers Association (MPA)
Association of Photographers (AOP)	Media Ireland
BAFTA	National Union of Journalists (NUJ)
BECTU	Newspaper Society
British Film Designers Guild	NI Screen
British Institute of Professional Photographers (BIPP)	Northern Film & Media
British Interactive Media Association (BIMA)	Ofcom
British Society of Cinematographers	Producers Alliance for Cinema & Television (PACT)
Broadcast Equality and Training Regulator (BETR)	Periodicals Training Council (PTC)
bTWEEN	Photo Assist
Cinema Exhibitors' Association	Photo Imaging Council (PIC)
Chinwag	Photo Marketing Association (PMA)
Cineguilds	Plymouth Media Partnership
CITIN/DCKTN	Power to the Pixel
Codeworks Connect	Production Base
Creative Bath	Publishers Association
Creative Business Wales	Publishing Scotland
Creative Scotland	Radio Academy
Cultural Enterprise	Radio Centre
Cyfle	Redeye
Data Publishers Association	Royal Photographic Society (RPS)
Develop	Satellite and Broadcasters Group (SCBG)
Digital Circle	Scottish Enterprise
Directors Guild of Great Britain	Scottish Screen
Directors UK	Screen East
E- consultancy.com	Screen South
EM Media	Screen West Midlands
FDMX	Screen Yorkshire
Film Agency for Wales	South East Media Network (SEMN)
Film Bang	Swindon Media Group
Film Distributors' Association (FDA)	The Production Guild
Film Export UK	TIGA
Film London	UK Film Council
GameHorizon	UK Interactive Entertainment Association (UKIEA, formerly ELSPA)
Gloucestershire Media Group	UK Screen Association

Guild of British Camera Technicians	Vision + Media
Guild of British Film and Television Editors	Wales Screen Commission
Guild of Location Managers	Wessex Media Group
Guild of Stunt and Action Co-ordinators	Women in Film and Television (WFTV)
Imagine	Writers' Guild of Great Britain
All other organisations who supported this project by promoting the project to industry employers	

The survey was promoted on Skillset's website and a number of other organisations, including many of those listed above, also promoted the survey on their websites.

Response and Coverage

A total of 2,634 surveys were completed, of which 2,500 were over the telephone and 134 online. It is not possible or appropriate to estimate response rates as target response numbers were set for each sector, which in most cases were met. A total ceiling of 2,500 completed telephone surveys was set in order to manage survey costs. Inevitably, successful completion and screening rates vary between sectors. **Figure 2.2** illustrates the number and percentage of employers participating in the survey by sector. The estimated employer population numbers are taken from Skillset's company database and official data sources. Overall, an estimated 8% of employers in scope participated in the survey, with considerable variation between sectors.

Efforts to secure response from employers working in the Computer Games and Visual Effects (VFX) sectors were focussed on NESTA's Employer Survey, developed with Skillset in order to inform the Livingstone/Hope review of the video games and visual effects industries⁹.

Figure 2.2 Final Response by Sector

	Estimated population of employers	Number of responding employers	% of employers represented
FILM	529	103	20
Production	258	76	30
Distribution	123	18	15
Exhibition	148	9	6
RADIO	799	148	19
Broadcast(Public)	1	1	100
Broadcast (Commercial)	229	59	26
Independent Production	58	16	28
Community/Voluntary and other Radio	511	72	14

⁹ Next Gen. Transforming the UK into the world's leading talent hub for the video games and visual effects industries, NESTA (2010)

	Estimated population of employers	Number of responding employers	% of employers represented
ANIMATION	627	105	17
INTERACTIVE MEDIA	7,458	568	8
Online Content	5,448	395	7
Other Interactive Media	2,010	173	9
COMPUTER GAMES	330	51	16
OTHER CONTENT CREATION	481	134	28
Corporate Production	260	92	35
Commercials and Other Content Creation	221	42	19
FACILITIES	3,212	252	8
Post Production	335	57	17
Studios & Equipment Hire	1,055	97	9
Other Facilities	1,822	98	5
ARCHIVES & LIBRARIES	124	38	30
TELEVISION	1,295	250	19
TV Broadcasting (Terrestrial, Cabsat & Distribution)	454	63	14
TV Production	841	187	22
PUBLISHING	9,715	479	49
Book Publishing	2,510	115	5
Publishing of Newspapers	500	124	25
Publishing of Journals & Periodicals	2,425	189	8
Other Publishing	4,280	51	1
PHOTO IMAGING	8,665	494	6
Photographic Activity	4,939	397	8
Other Photo Imaging	3,726	97	3
OTHER CREATIVE MEDIA INDUSTRY	N/A	12	N/A
TOTAL	33,252	2,634	8

Source: Skillset 2010 Company Database (created from a variety of sources including previous research participants, Trade Association membership lists and Industry Directories). All figures have been verified with sector representatives. NESTA (Computer Games) and IDBR 2009 (Photo Imaging and Publishing).

Classification and Weighting

In some cases, where a low number of responses was received, sectors have been grouped as follows to enable sufficiently robust data to be reported:

- Film Distribution has been merged with Cinema Exhibition;
- Public and Commercial Radio have been merged to form 'Broadcast Radio'
- Community Radio and Independent Production for Radio have been merged to form 'community and other Radio'
- Special Physical Effects, Visual Effects, Film Processing Laboratories, production of digital media format and Other Facilities have been merged under one heading 'Other Facilities';
- Games Development, Games Publishing and Games Development support have been merged under one heading 'Computer Games';
- Offline multimedia, interactive TV, IPTV and mobile content have been merged under one heading 'Other Interactive Media';
- Commercials Production and Pop Promos have been merged under one heading 'other content creation'
- 'Other Photo Imaging' includes the sub-sectors Manufacturers/Support Services, Retail and Laboratories and Picture Libraries and Agencies.
- 'Other' includes Film distribution, teaching/lecturing, employment in a non-creative media industry and unemployment.

As can be seen in **Figure 2.2**, the percentage of employers represented in the response varies considerably by sector. To account for varying levels of representativeness between sectors, and in order to achieve total figures representative of the Creative Media Industries in scope, weightings have been applied to each sector based on information from Skillset's company database and official data sources, as shown in **Figure 2.2**.

Analysis and Presentation

In all tables, the base (the number of people responding to that question) is clearly marked. This fluctuates throughout the report as some respondents chose not to respond to every question, and some questions were only relevant to some employers. Data are only reported where a question yielded a response of twenty or more from the constituency being reported. Where the response is lower than twenty, table cells are marked 'n/a' or bars in charts are left blank. In some cases, even where data are reported, when response numbers are shown as over twenty but still relatively low, some caution should be exercised when interpreting the data.

All percentages have been rounded to whole numbers. This may mean that some percentages do not add up to a total of 100%. Cases where the percentage rounded to zero are marked with a '*'.

For every question in the survey, where response numbers allow, data are reported by sector. In most cases, they are also reported by nation/region and company size, except where there are no significant differences, patterns, or issues to report.

Acknowledgments

The survey was steered by Skillset's Research Committee, membership (at the time of the survey) of which is listed below, all of whom we would like to thank:

Peter Block (BETR)
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Alice Dickerson (The Radio Centre)
Andy Egan (BECTU)
Jonathan Hirsch (HirschWorks)
Rubbina Karruna (DCMS)
Claire Paul (BBC)
Kerrie Rice Oxley (Nickelodeon)
David Steele (Chair)
Jo Taylor (Channel 4)
Nick Maine (UK Film Council)
Roger Ingham (IPA)
Nick Evans (independent consultant)

The fieldwork, data entry and preparation of tables for analysis was managed by IFF Research. This report was written by Neil Flintham, freelance consultant.

We would also like to thank all those employers who took the time to complete the survey and the organisations that assisted with distributing and promoting it.

3 Profile of Respondents

The breakdown of both the survey response and population by sector is covered in Section 2 and shown in Figure 2.2. This section covers other aspects of employers in scope to the survey, including:

- Geographical distribution
- Company Size
- Number of sites operated
- Age of company
- Use of people on short term contracts¹⁰

Geographical Distribution¹¹

The survey asked employers in which of the nations or English regions they were based. Nearly half are based either in London (26%) or the South East (20%). The next highest concentrations of the industry are in South West England (9%), North West England (7%), Scotland (7%).

¹⁰ 'Short term contract' = contract of less than 365 days and 'employee' = contract of 365 days or more.

¹¹ The geographical distribution of employers responding to the survey is not necessarily reflective of the actual geographical distribution of employers in the Creative Media Industries. However, comparison with the estimated actual distribution in nations is broadly similar – England (90%), Wales (3%), Scotland (5%), Northern Ireland (1%).
Source: Skillset 2010 Company Database, NESTA, and IDBR 2009.

Figure 3.1 Proportion of Employers Based in Each Nation and Region of the UK

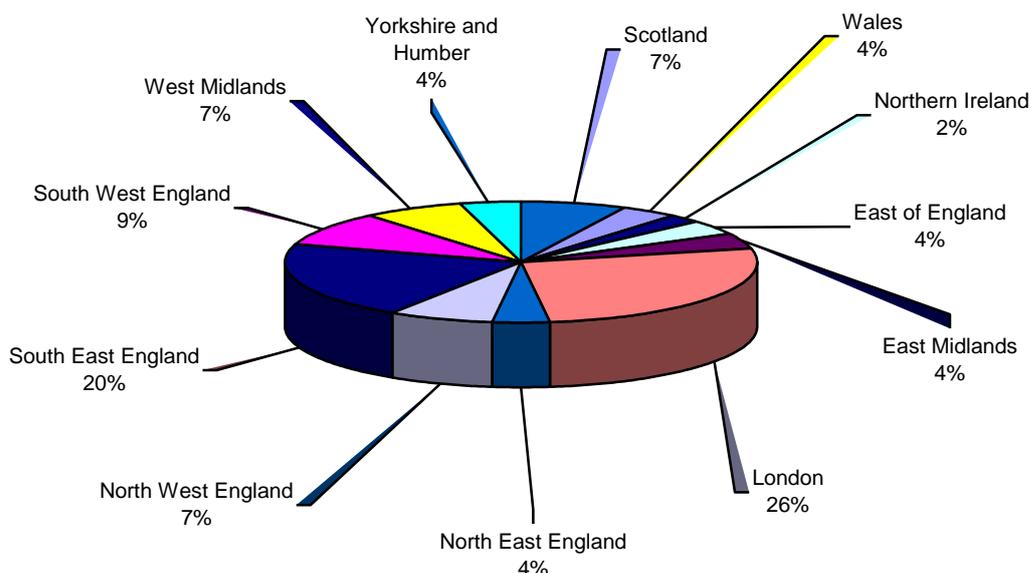


Figure 3.2 shows the geographical distribution of employers in each sector. The highest concentrations of employers based in London are in Broadcast Television (71%), Film Production (63%), Film Distribution and Cinema Exhibition (62%), and Archives and Libraries (54%). The lowest are in community and other Radio (5%) and the various sub-sectors of Interactive Media, Publishing and Photo Imaging. The highest proportions of employers based outside England are found in Independent Production for Television and Publishing of Newspapers (both 28%).

Figure 3.2 Proportion of Employers Based in Each Nation of the UK, by Sector

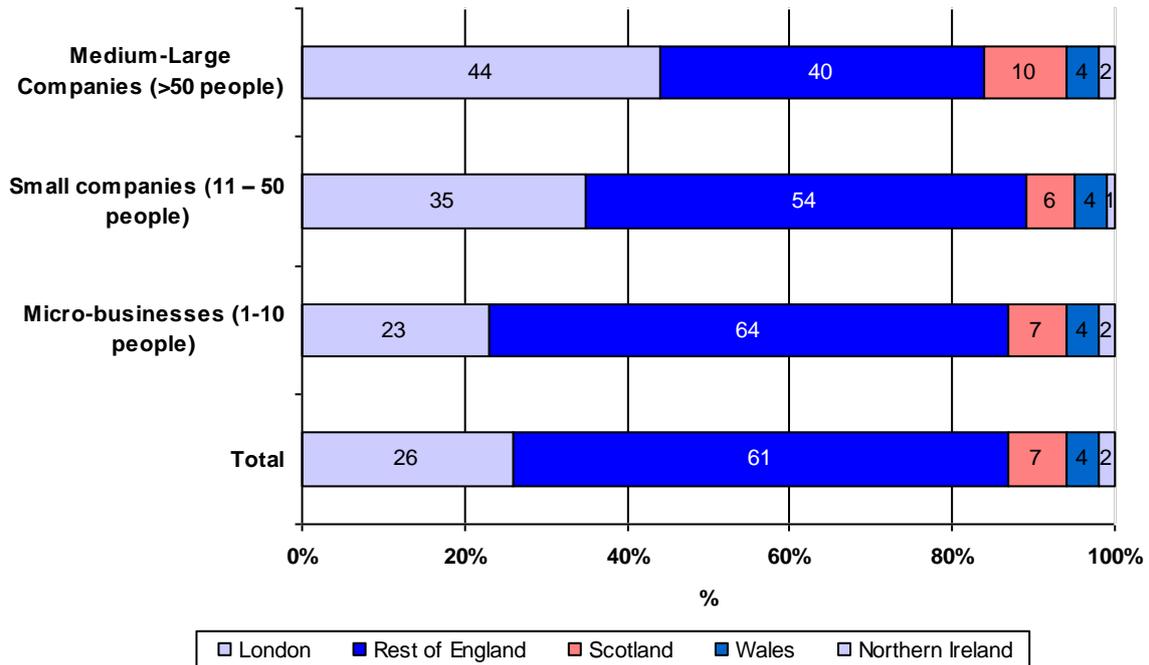
	London	Rest of England	Scotland	Wales	N. Ireland	Base
	%	%	%	%	%	
Film Production	63	22	9	3	2	76
Distribution and Exhibition	62	29	10	0	0	25
Broadcast Radio (inc Independent Production)	28	53	15	3	0	75
Community/Voluntary and other radio	5	71	15	5	3	72
Animation	45	35	13	5	2	105
Online Content	22	69	5	3	1	395

Other IM (all bar online content)	22	68	5	3	2	174
Computer Games	15	58	15	10	2	51
Corporate Production	27	50	17	4	2	92
Commercials and Other Content Creation	49	45	4	3	0	42
Post production	46	42	5	2	5	57
Studios & Equipment Hire	30	49	12	3	5	99
Other Facilities	29	52	13	4	2	95
Archives & Libraries	54	37	6	1	2	38
TV Broadcasting (terrestrial, cabsat & distribution)	71	15	3	5	5	48
TV Production	35	37	11	13	4	202
Book Publishing	18	72	9	1	*	115
Publishing of Newspapers	16	55	19	2	7	124
Publishing of Journals & Periodicals	27	63	7	3	1	189
Other Publishing	30	63	3	5	0	51
Photographic Activity	19	66	6	5	4	397
Other Photo Imaging	24	60	9	3	3	100
Total	26	61	7	4	2	2634

Base 2,634

London-centricity is closely related to company size: 44% of medium-large employers are based in London, compared with 35% of small employers and 23% of micro-businesses.

Figure 3.3 Proportion of Employers Based in Each Nation of the UK, by Company Size

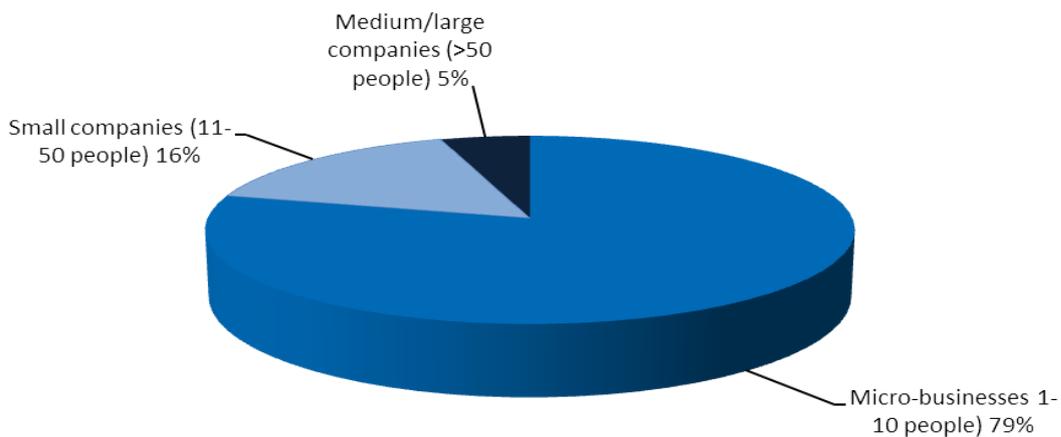


Base 2,634

Company Size

Employers were then asked how many people they employed. Nearly three quarters of respondents (79%) are micro-businesses, 16% small employers, and 5% medium-large employers.

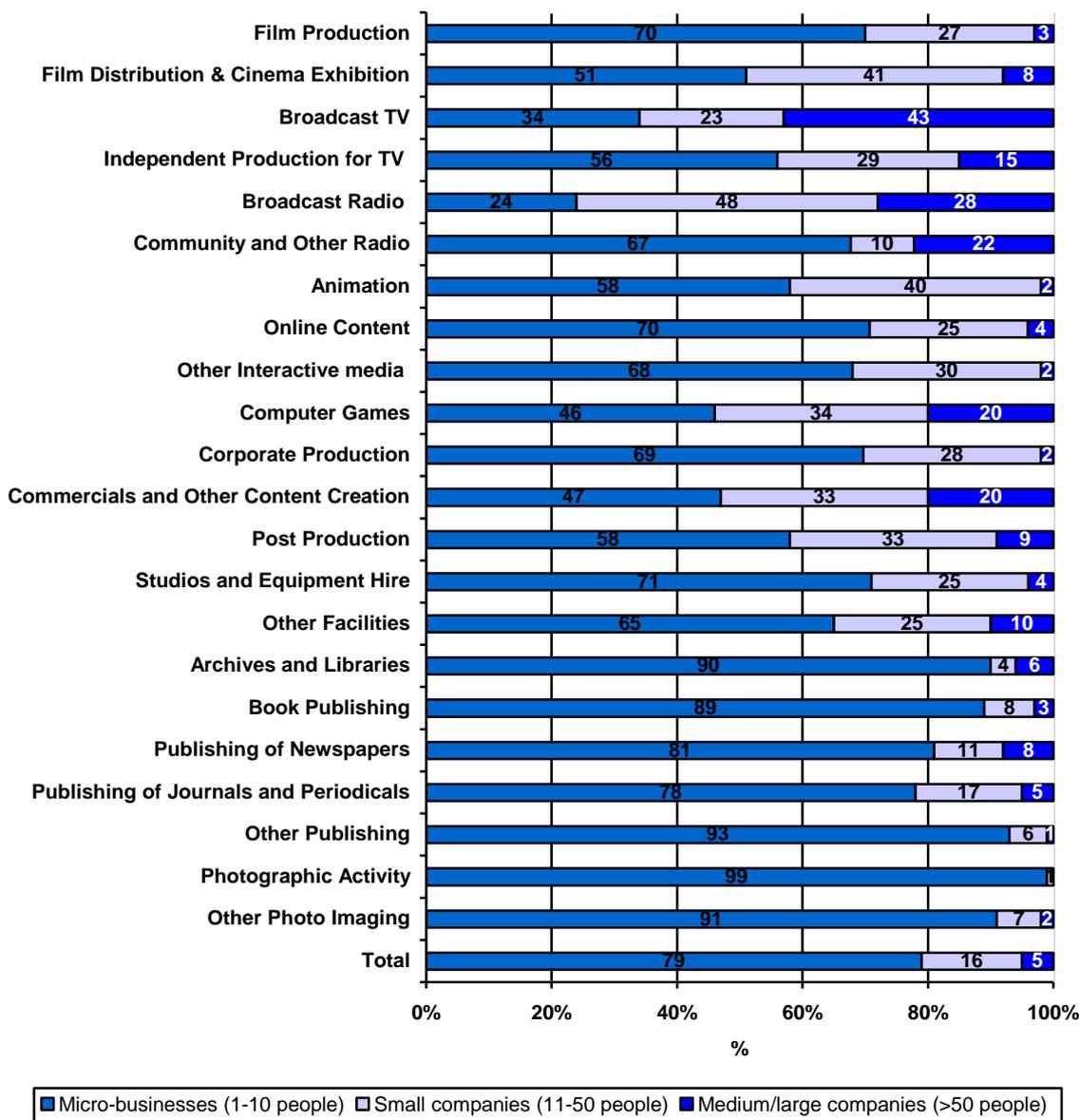
Figure 3.4 Proportion of Employers of Each Size Band



Sectors vary greatly in the spread of employers by size. The proportion of medium-large employers is much higher than average in Broadcast Television (43%), and Broadcast Radio

(28%), and lowest in the sub-sectors of interactive, Publishing and photo-imaging. Conversely, the vast majority of employers in Publishing and virtually all in photo-imaging are micro-businesses.

Figure 3.5 Proportion of Employers of Each Size Band by Sector

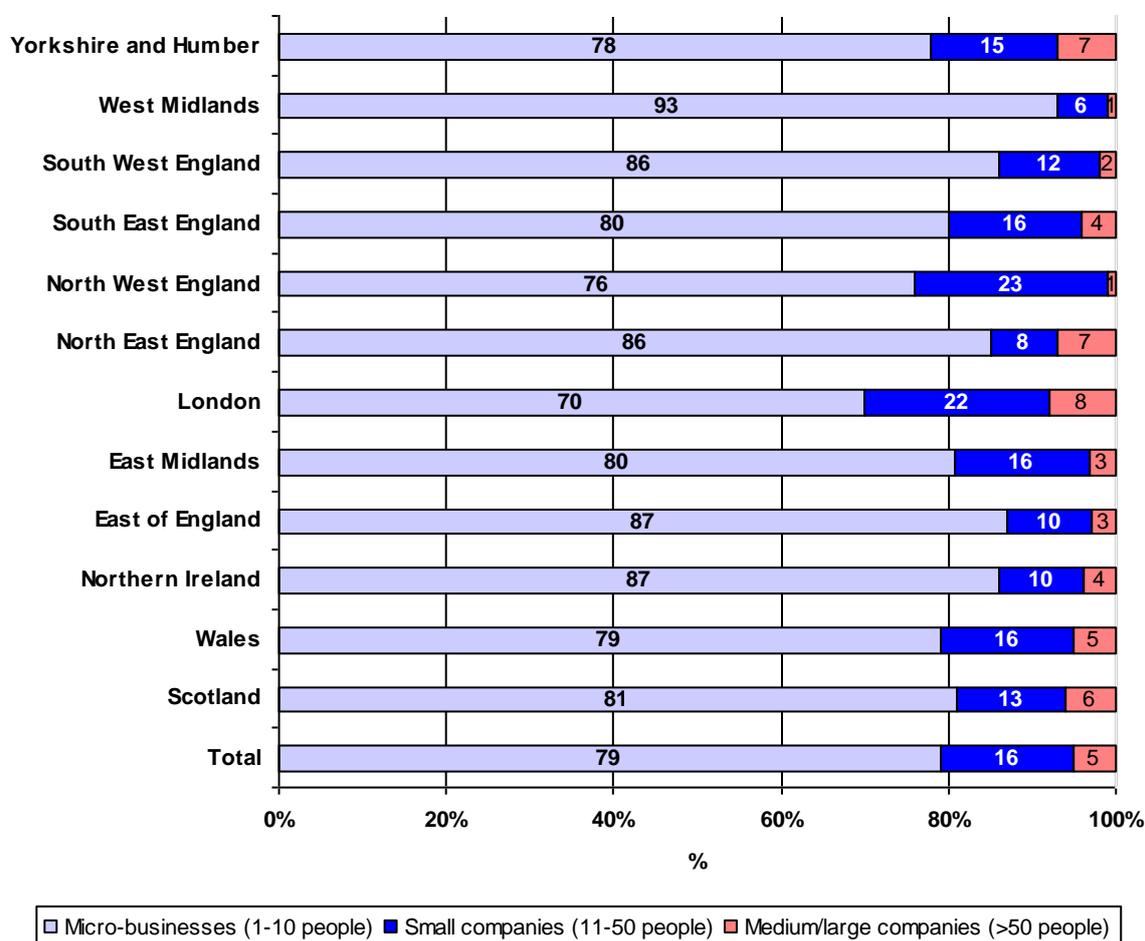


Base 2,634

As can be seen in **Figure 3.6**, there are relatively few variations by nation or region in company size, and those that do exist are likely to be an effect of the concentration of sectors within each nation and region. For example, the regions with the greatest proportion of medium-large employers are the North West (23%) and London (22%), both of which contain major concentrations of Broadcast Television employers. As shown in **Figure 3.5**,

Broadcast Television contains a higher percentage of medium-large employers than any other sector.

Figure 3.6 Proportion of Employers of Each Size Band by Nation and Region



Number of Sites Operated

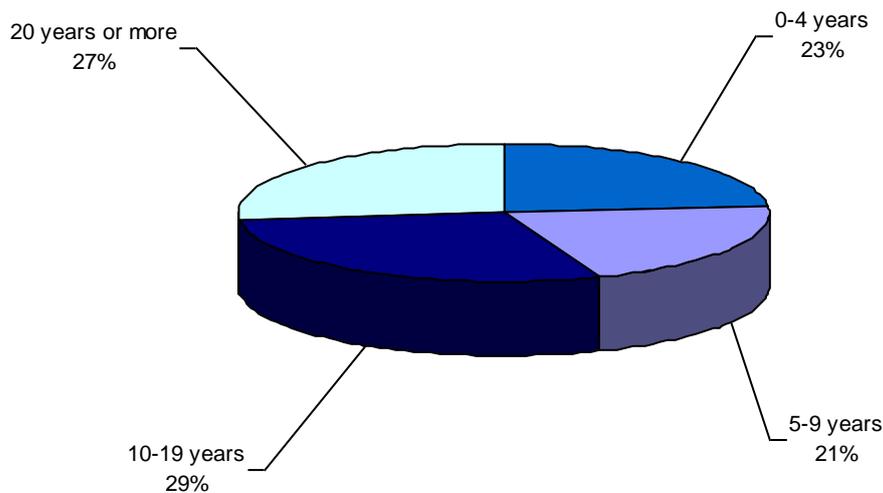
Employers were asked whether theirs was the only establishment in the company or one of a number. Over four fifths (84%) say it is the only site, and the remaining 16% that their company operates more than one site. Notably, three sectors contain much higher proportions of multi-site employers than others: Broadcast Television and Broadcast Radio (both 69%) and Publishing of Newspapers (64%).

As would be expected, the proportion of multi-site employers correlates positively with company size: 55% of medium-large employers are multi-site, compared with 30% of small employers and 11% of micro-businesses.

Age of Company

Respondents were asked how many years their company had been in business. As shown in **Figure 3.7**, approximately equal proportions have existed for 0-4 years, 5-9 years, 10-19 years, and 20 years or more, with just over or under a quarter falling into each category.

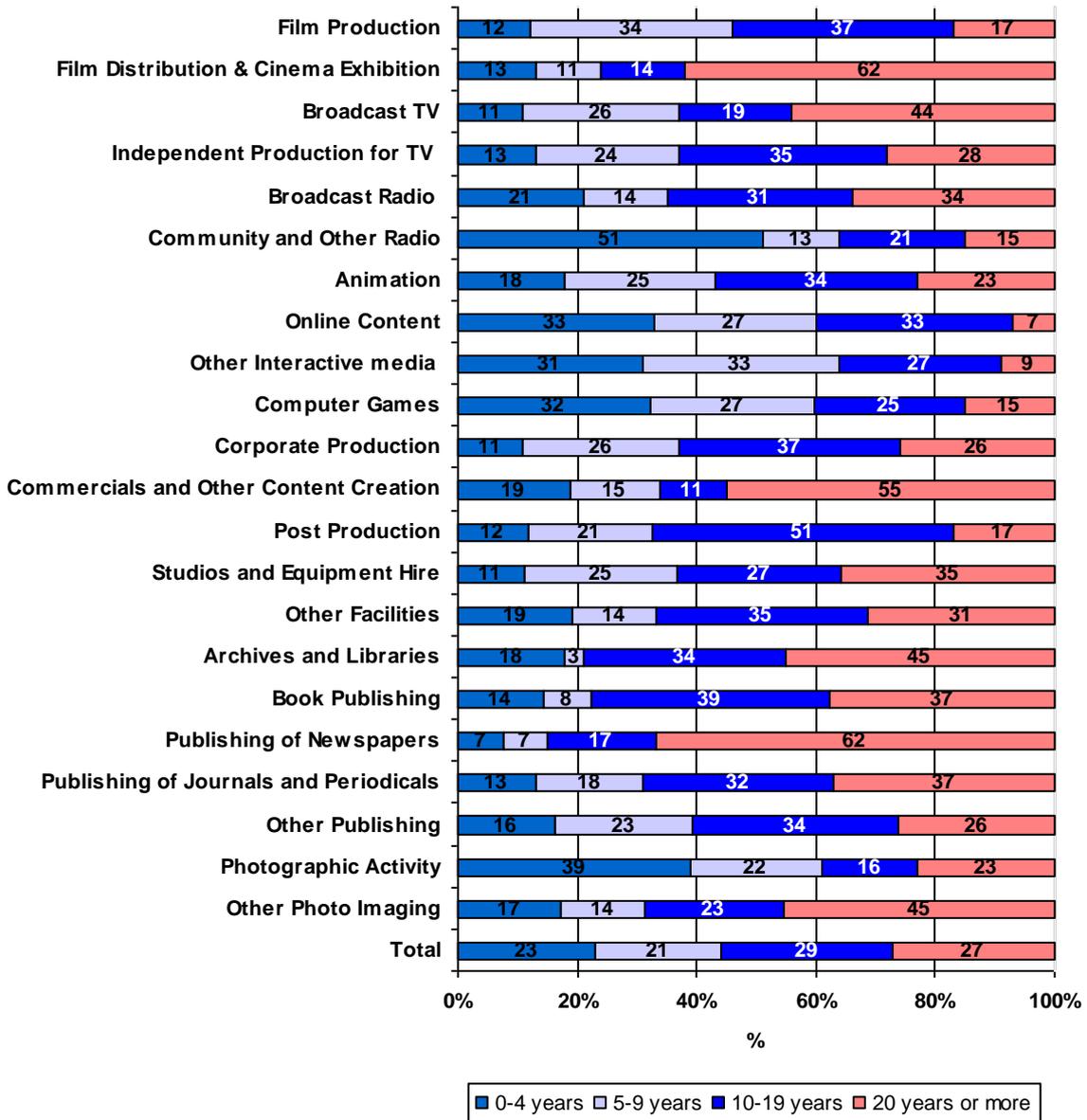
Figure 3.7 Proportion of Employers within Each Age Band



Base 2,634

Age of company varies greatly by sector, as can be seen in Figure 3.8. The proportion of employers aged 20 years or over is highest in: Film Distribution and Cinema Exhibition (62%), Publishing of Newspapers (62%), Commercials (55%), Archives and Libraries (45%), Other Photo Imaging (45%), and Broadcast Television (45%). Conversely, it is lowest in the Interactive Media sub sectors (between 7%-9%), and Computer Games (15%).

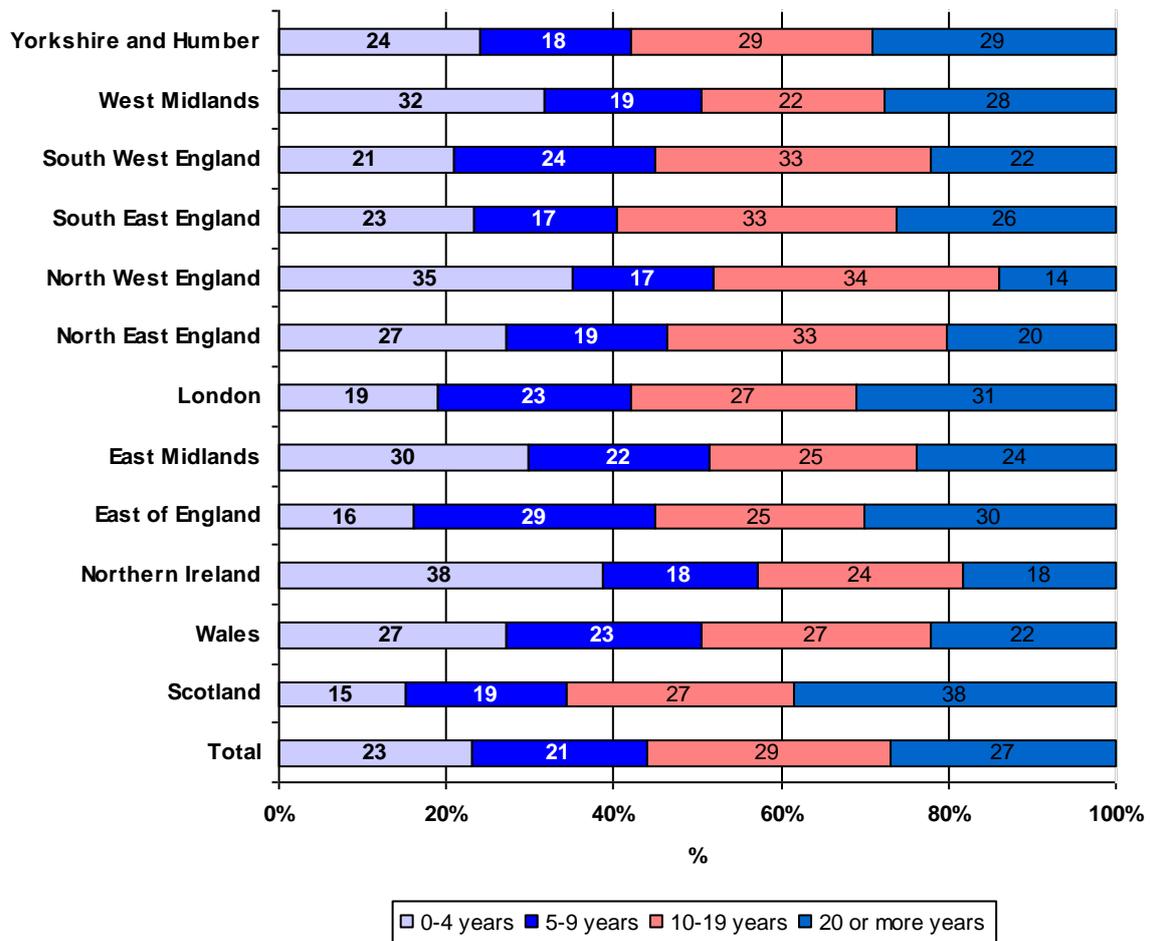
Figure 3.8 Proportion of Employers within Each Age Band by Sector



Base 2,634

Figure 3.9 shows the distribution of employers by age in each nation and region of the UK. While there are some minor variations, as with previous variables, this is likely to be a secondary effect of sectoral distribution.

Figure 3.9 Proportion of Employers within Each Age Band by Nation and Region



Base 2,634

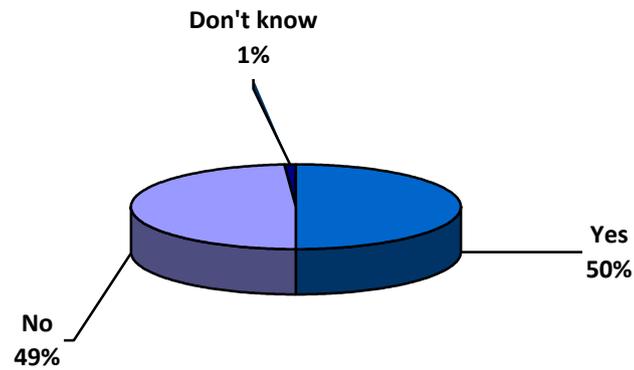
As would perhaps be expected, age of company correlates positively with company size: 62% of medium-large employers are twenty years or older, compared with 28% of small employers and 24% of micro-businesses.

Use of People on Short Term Contracts¹²

Approximately half (48%) of responding employers say they use people on short term contracts compared to 46% that say they do not.

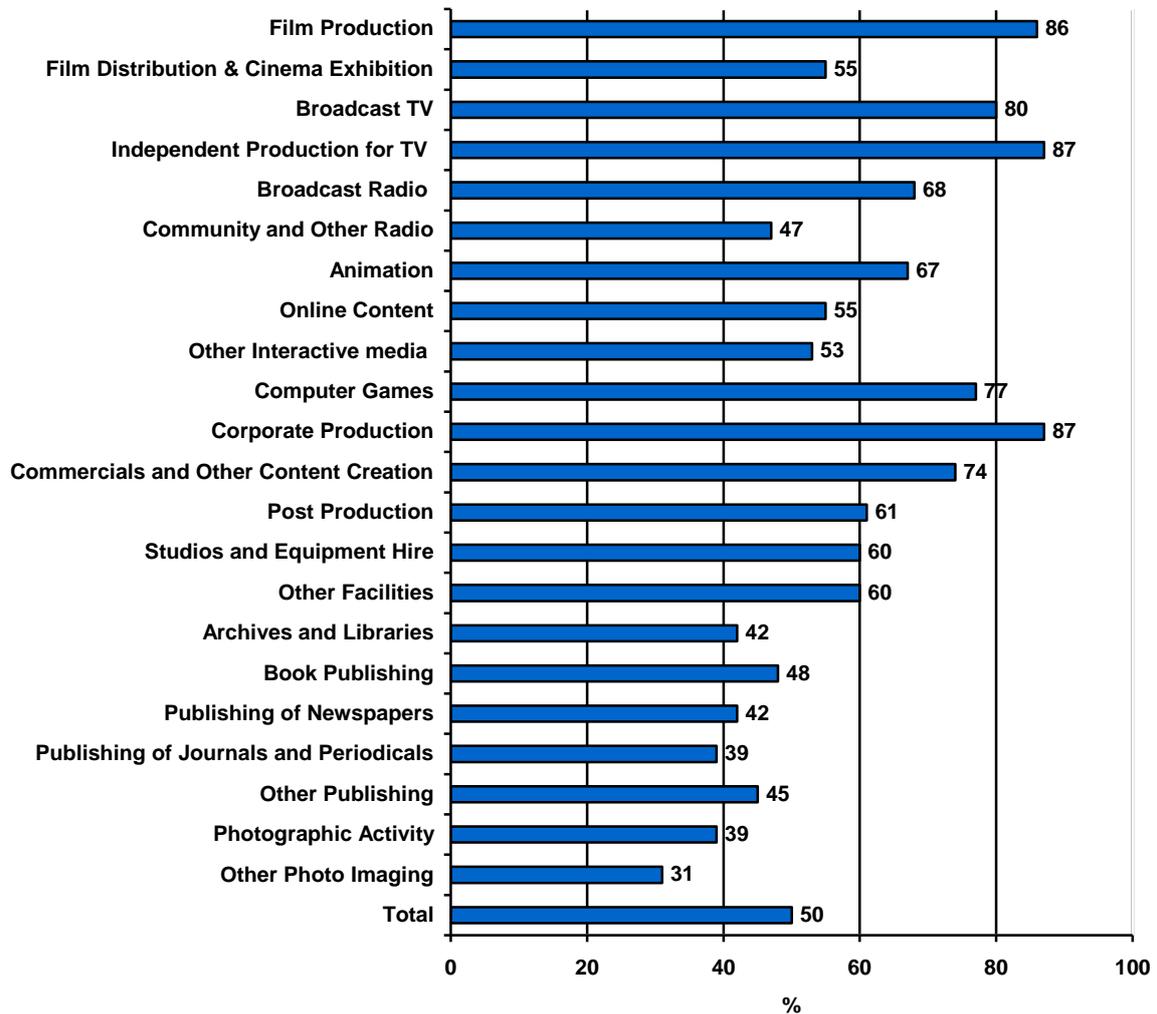
¹² 'Short term contract' = contract of less than 365 days and 'employee' = contract of 365 days or more.

Figure 3.10 Proportion of Employers Employing People on Short Term Contracts



The usage of people on short term contracts varies enormously by sector. As can be seen in **Figure 3.11**, use of short term contracts is most prevalent in sectors most closely involved in audio visual content creation and production, such as: Independent Production for Television (87% of employers), Corporate Production (87%), Film Production (86%), Broadcast Television (80%), and Computer Games (77%). The proportion of employers employing people on short term contracts is lowest in the sub sectors of Photo Imaging (31% - 39%), and Publishing (39% - 45%).

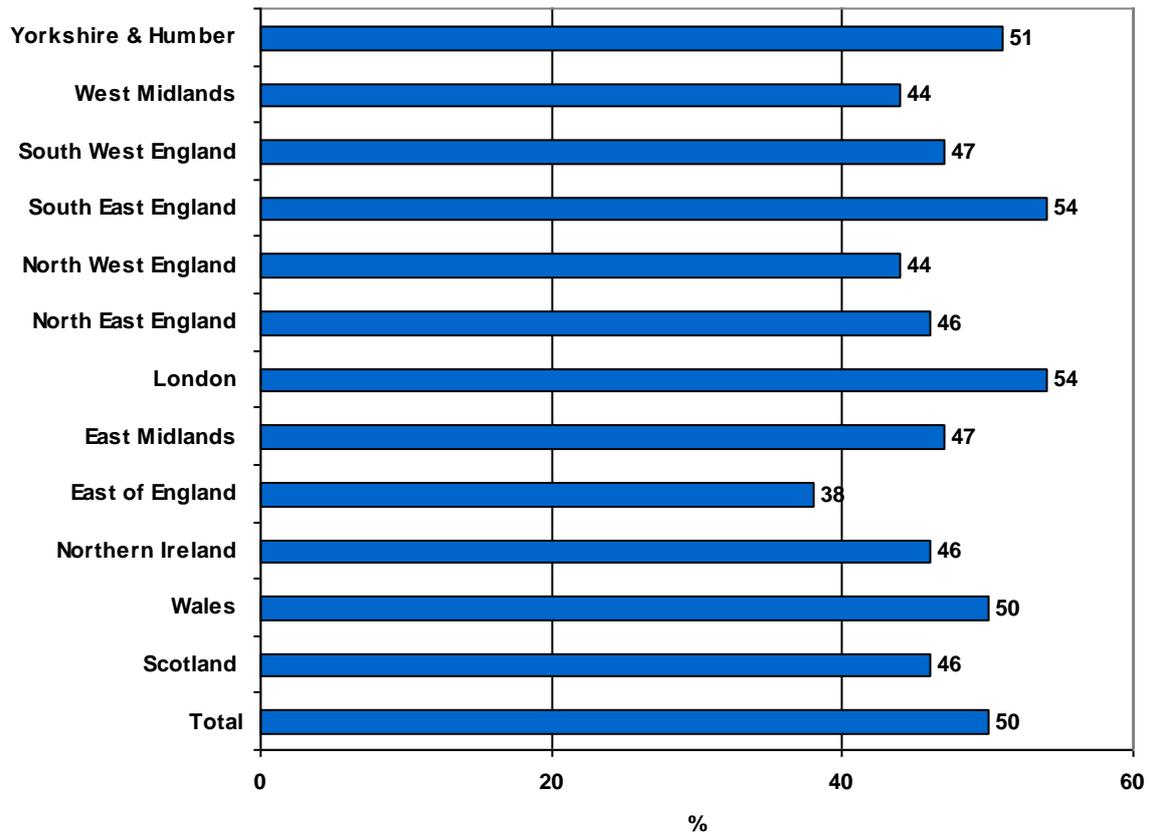
Figure 3.11 Proportion of Employers Employing People on Short Term Contracts in Each Sector



Base 2,634

Figure 3.12 shows the proportion of employers in each nation or region employing people on short term contracts. There is considerable variation, largely reflecting the concentration of sectors within each nation or region – thus London and South East England have the highest proportions of employers employing people on short term contracts, and also the largest clusters of the most freelance-dependent sectors (such as Independent Production for Television, Corporate Production, and Film Production).

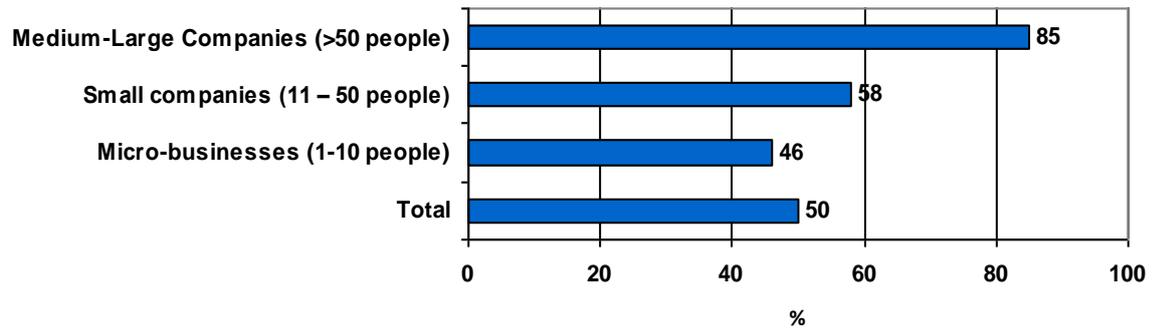
Figure 3.12 Proportion of Employers Employing People on Short Term Contracts in Each Nation and Region



Base 2,634

Finally in this section, **Figure 3.13** shows the picture by company size and reveals that larger employers are more likely than average to employ people on short term contracts – 85% of medium-large employers do so, compared with 58% of small employers and 46% of micro-businesses. This may simply be because the larger the company, the more people are employed, and therefore the greater the potential capacity for employment of people on short term contracts.

Figure 3.13 Proportion of Employers Employing People on Short Term Contracts by Company Size



Base 2,634

4 Recruitment

This section covers recruitment activity over the past twelve months, including:

- Recruitment of employees and freelancers
- Sources of recruitment
- New entrant skills gaps
- Demand for skills
- Vacancies
- Skills shortages

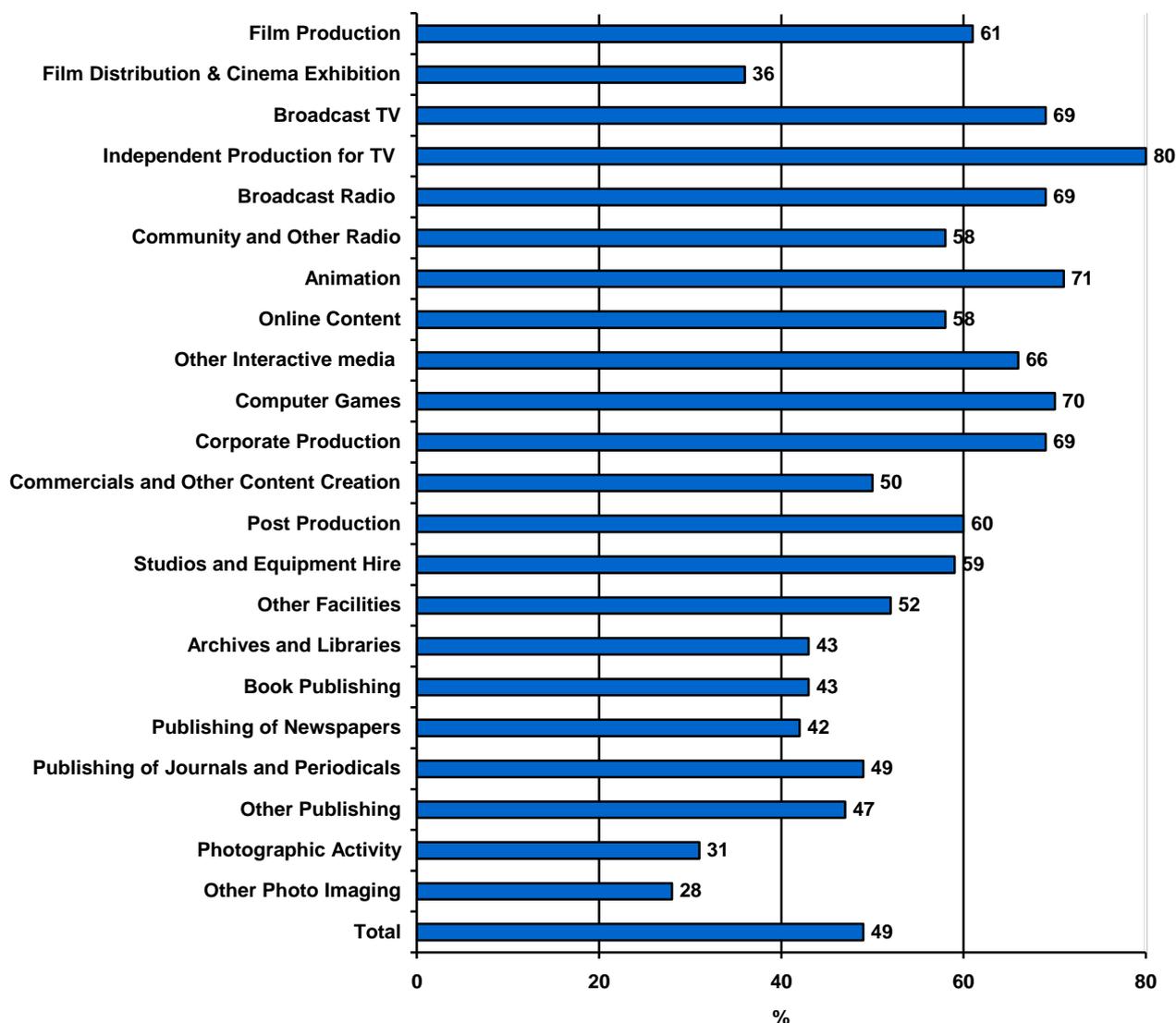
Recruitment of Employees and Freelancers

First, the survey asked employers whether they had recruited any employees or people on short term contracts in the past year. 49% of employers reported that they have whilst 51% reported that they haven't.

Figure 4.1 shows the proportion of employers having recruited in the past year by sector. The most notable trend is that employers within the sectors of Photo Imaging and Publishing are far less likely than average to have undertaken recruitment: for example, 31% of employers in Photographic Activity, 43% of those in Book Publishing, and 42% of those in Newspaper Publishing have recruited in the past year, compared with the average of 49%.

At the other end of the spectrum, employers in the Television and Radio sub sectors are most likely to have undertaken recruitment in the past year (for example, 80% of Independent Production employers and 69% of those in Broadcast TV and Broadcast Radio) along with those in Animation and Computer Games (71% and 70% respectively). To some extent, this may be a corollary of company size, as smaller employers are less likely to have recruited new people. However, reference back to **Figure 3.8** suggests that the picture is more complex than this, as for example Independent Production and Animation both comprise many smaller employers but are among those most likely to have carried out recruitment.

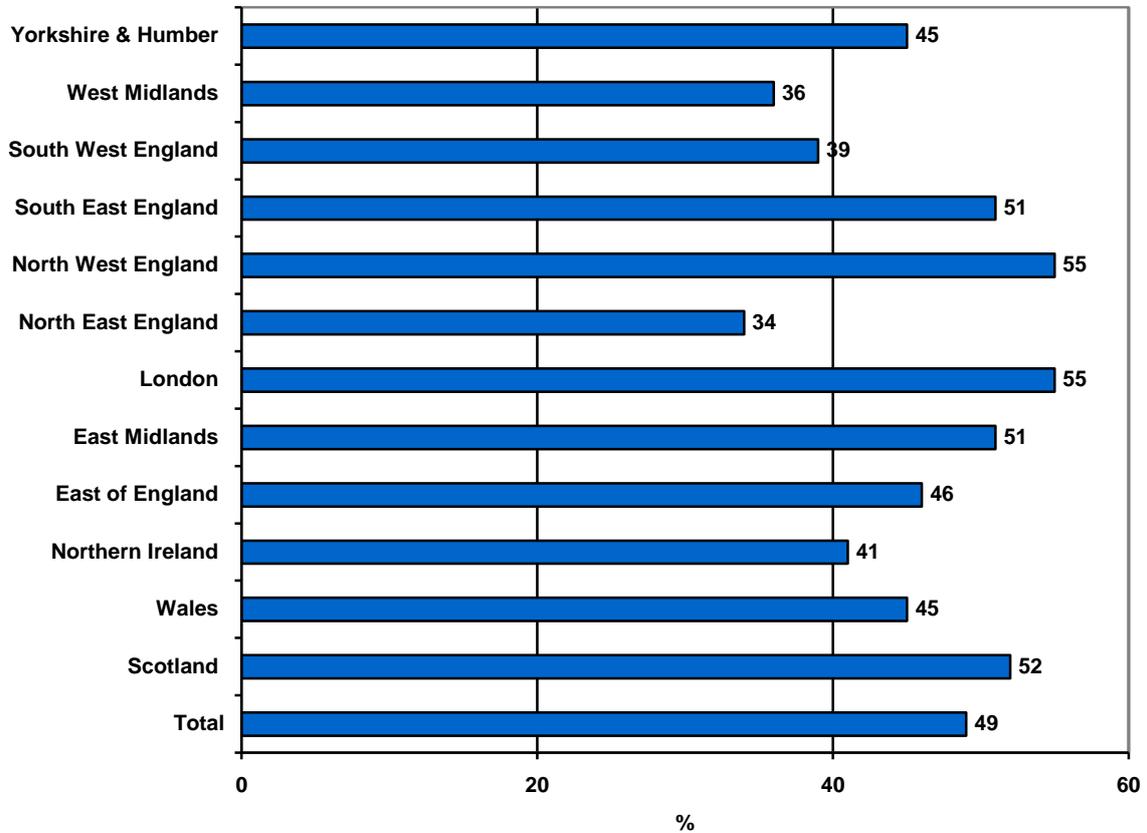
Figure 4.1 Proportion of Employers Taking on New Employees or People on Short Term Contracts over the Past Twelve Months by Sector



Base 2,634

The proportion of employers in each nation and region having recruited in the past year is shown in **Figure 4.2**. Those areas in which lower than average proportions of employers have recruited include the North East (34%), the West Midlands (36%), South West England (39%) and Northern Ireland (41%). This may partly reflect the relative impact of the recession on different areas of the UK. However, it may also reflect the concentrations and clusters of different sectors across the nations and regions. For example, the regions with the highest proportions of employers having recruited are London (55%) and the North West (55%), both of which contain major clusters of the Television industry, in which **Figure 4.1** showed relatively high levels of employers to have recruited.

Figure 4.2 Proportion of Employers Taking on New Employees or People on Short Term Contracts over the Past Twelve Months by Nation/Region

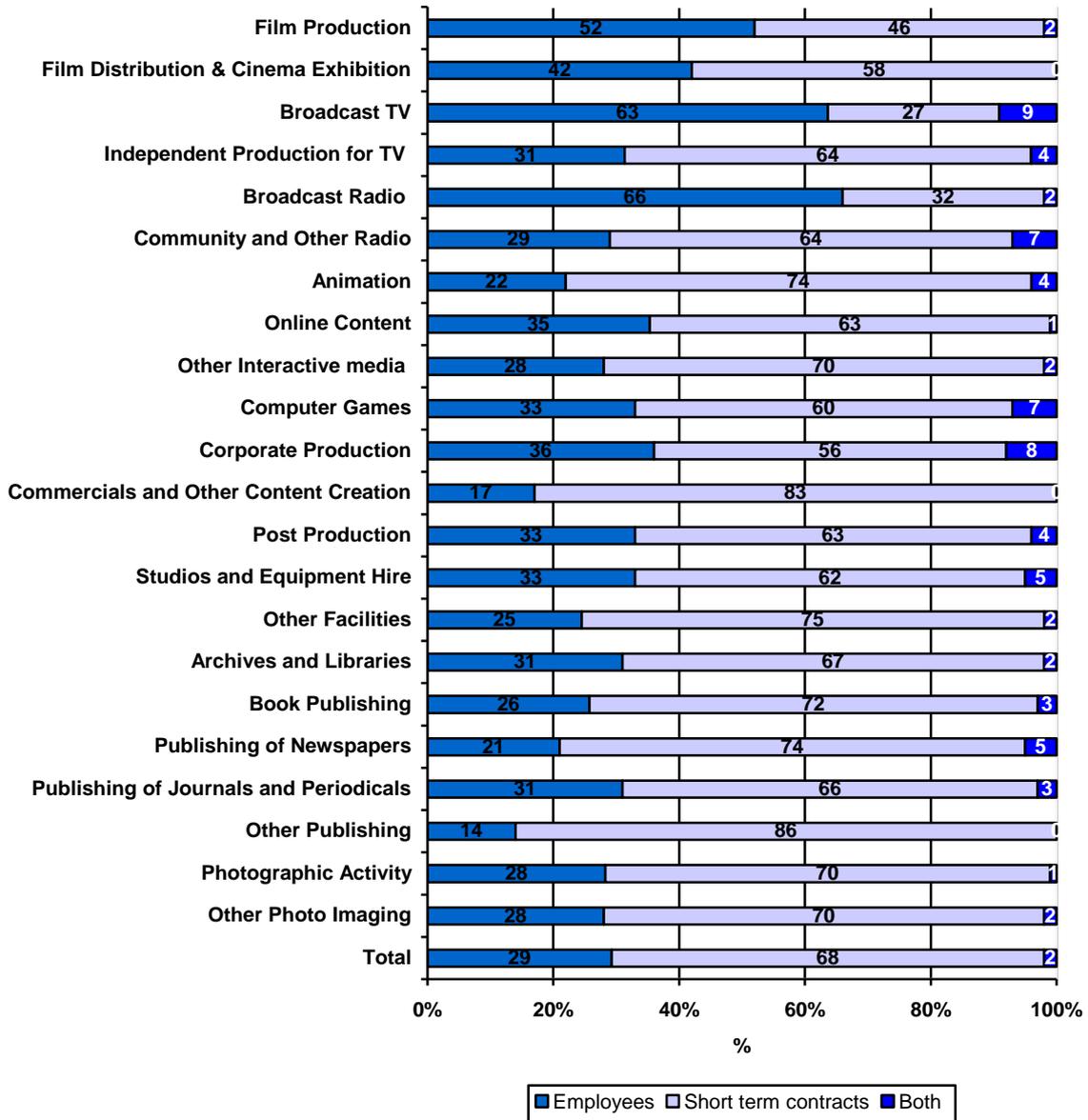


Base 2,634

As would be expected, larger employers are more likely to have recruited than smaller ones, as they have larger establishments. 91% of medium and large employers having recruited in the past year, compared with 75% of small employers and 40% of micro-businesses.

Figure 4.3 shows the proportion of companies recruiting people as employees, on short term contracts or both over the past twelve months. The figure reveals that with the exception of those in Broadcast Television, Broadcast Radio and Film Production employers were significantly more likely to have recruited people on short term contracts than as permanent employees.

Figure 4.3 Proportion of Employers Recruiting People as Employees, on Short Term Contracts, or Both, by Sector



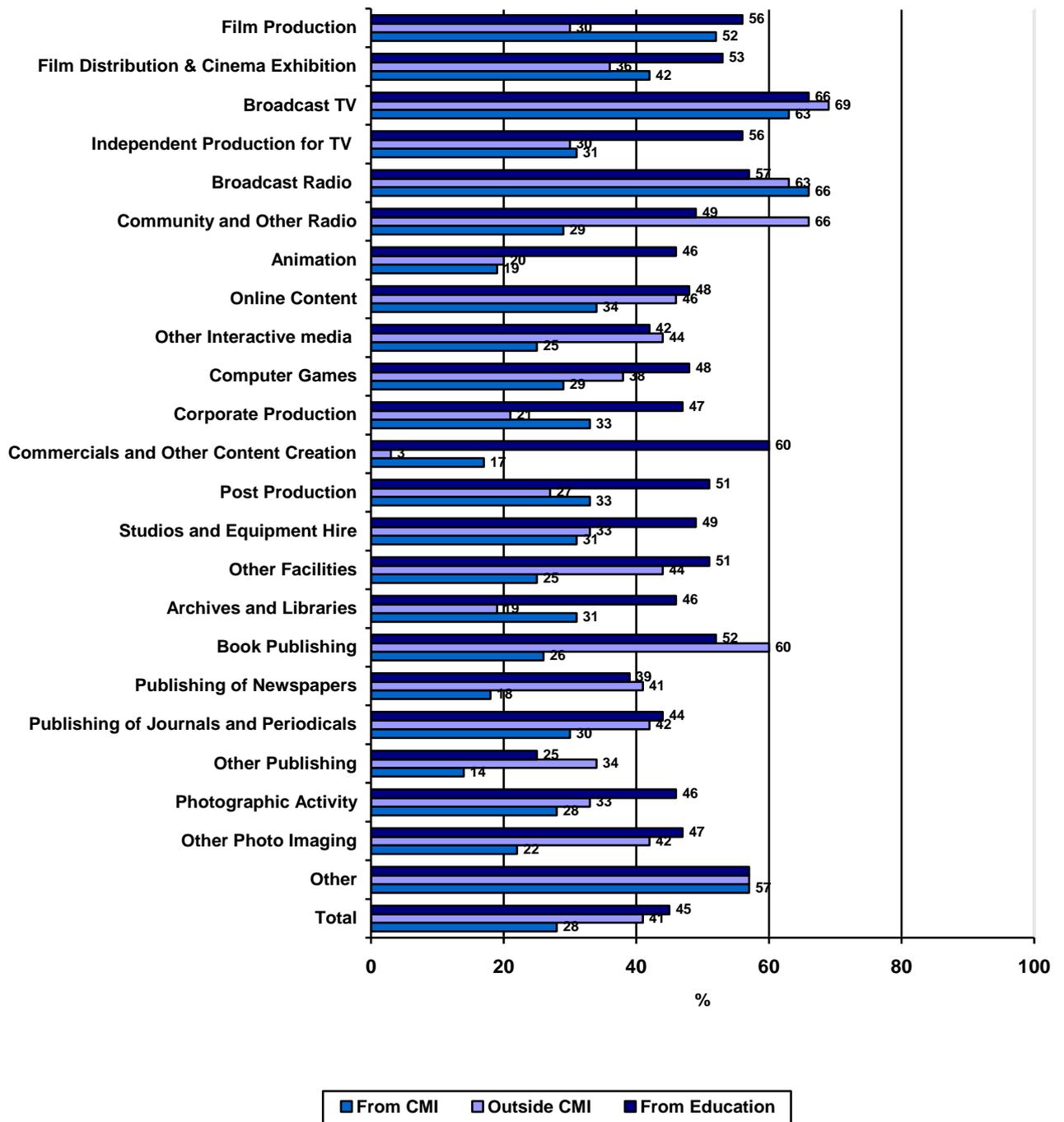
Base 1,393

Sources of Recruitment

The survey also asked employers from which sources they recruited. As can be seen in **Figure 4.4**, overall, 45% of employers say they have recruited directly from education, 41% from outside the Creative Media Industries, and 28% from within the Creative Media Industries. Recruitment from education is most prevalent in Broadcast Television (66% of employers), Commercials and other content creation (60%), Broadcast Radio (57%), and Film Production (56%). It is less common among sectors within Facilities and Interactive Media, and least common in the Publishing sectors, such as newspapers (39%) and Other Publishing (25%).

Recruitment from outside the Creative Media Industries is most prevalent in Broadcast Television (69%), community and other Radio (66%) and Broadcast Radio (63%), and least common in Commercials and other content creation (3%), Archives and Libraries (19%), and Animation (20%). Recruitment from within Creative Media is most commonplace in Broadcast Radio (66%), Broadcast TV (66%), and Film Production (52%), and least prevalent among Commercials and other content creation (17%) and among the Publishing and Photo Imaging sub sectors.

Figure 4.4 Proportion of Employers Recruiting from Key Sources by Sector



Base 1,393

New Entrant Skills Gaps

Respondents who had recruited direct from education were asked whether they had found any specific skills difficult to obtain in applicants. The most common skill area cited is sales and marketing (31% of employers), followed by leadership and management skills (27%), multi-skilling (23%) and specific software skills (22%).

Figure 4.5 Proportion of Employers Finding Skills Difficult to Obtain in Applicants Direct from Education, by Sector

	Skills to develop content for multiple platforms	Leadership and Management Skills	Sales and Marketing Skills	Business skills	Finance skills	Technical skills	Set Crafts Skills	Production skills	Creative talent e.g. directing, writing, producing	Skills in using software packages	Multi –skilling	Other	Don't know	Base
	%	%	%	%	%	%	%	%	%	%	%	%	%	<i>n</i>
Film Production	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	17
Film Distribution & Cinema Exhibition	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	4
Broadcast TV	0	28	19	5	5	0	2	0	23	9	16	21	18	23
Independent Production for TV	1	35	23	2	23	5	11	4	24	25	22	15	11	75
Broadcast Radio	0	34	27	13	15	0	0	0	4	5	18	1	22	21
Community and Other Radio	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	19
Animation	0	23	21	0	24	0	14	0	6	27	25	13	14	29
Online Content	3	26	24	12	21	6	5	0	10	19	22	15	28	83
Other Interactive Media	19	26	42	28	9	22	4	0	15	22	16	29	17	43
Computer Games	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	18
Corporate Production	0	34	11	3	15	12	0	3	9	7	26	3	11	25
Commercials and Other Content Creation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	7
Post Production	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	15
Studios and Equipment Hire	4	37	28	15	23	17	8	4	8	12	18	16	10	26

Other Facilities	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	19
Archives and Libraries	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	12
Book Publishing	1	7	14	14	7	0	0	0	8	19	2	14	24	33
Publishing of Newspapers	3	14	20	5	2	3	0	2	20	23	5	14	18	34
Publishing of Journals and Periodicals	2	9	12	5	6	10	3	2	14	33	6	18	31	45
Other Publishing	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	9
Photographic Activity	7	34	51	20	11	17	17	5	16	36	28	21	17	60
Other Photo Imaging	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	16
Total	3	27	31	10	16	7	8	1	16	22	23	15	19	637

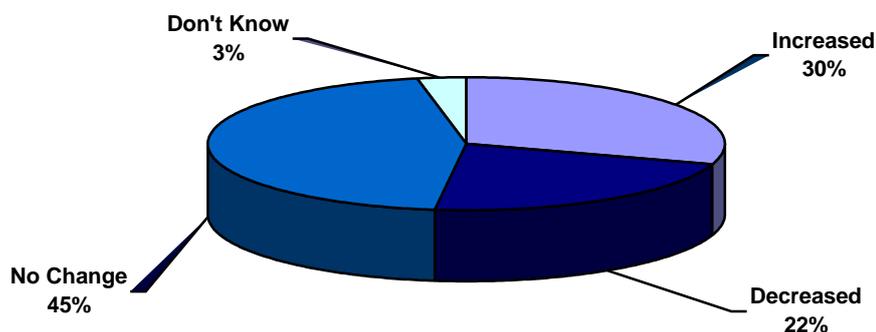
Base: 637

Respondents in Wales that had recruited direct from education in the past twelve months were also asked if Welsh language skills were difficult to obtain in applicants; a third (33%) of Welsh respondents reported that it was.

Demand for Skills

The survey asked employers whether they had experienced any change in their requirement for people on short term contracts in the year leading up to the survey. As shown in **Figure 4.6**, 45% say there has been no change, 30% that it has increased, and 22% that it has decreased.

Figure 4.6 Proportion of Employers Reporting Increase, Decrease or No Change in Requirement for People on Short Term Contracts Since Previous Year

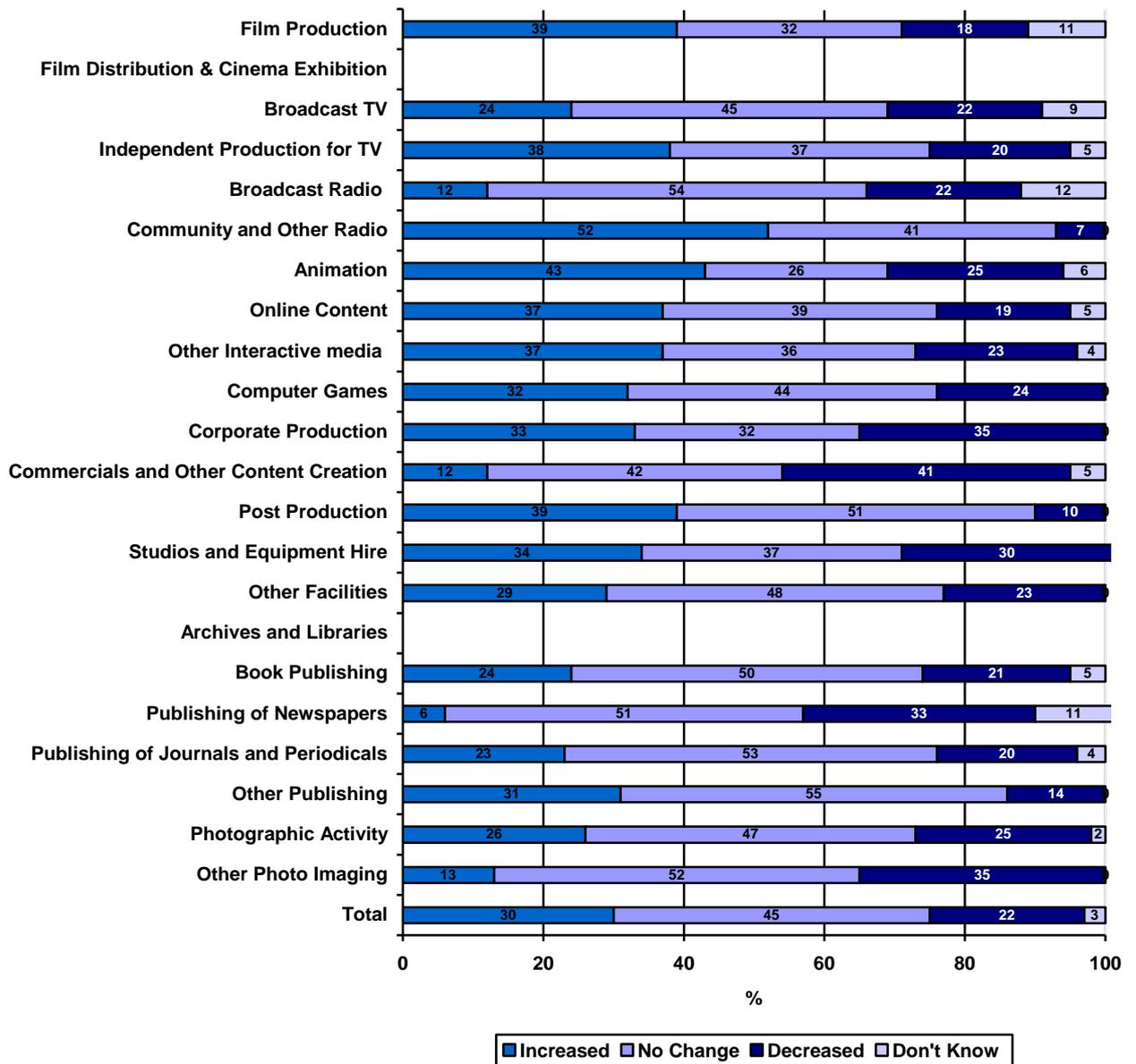


Base 1,432

Figure 4.7 reveals some major differences between sectors in their requirements for people on short term contracts over the past year. More employers than average in community and

other Radio (52%), Animation (43%), Archives and Libraries (42%), Film Production, Film distribution and cinema exhibition, and Post Production (all 39%), report an increase. Conversely, the proportion reporting a decrease is highest in Commercials and other content creation (41%), Corporate Production (35%), and Other Photo Imaging (35%).

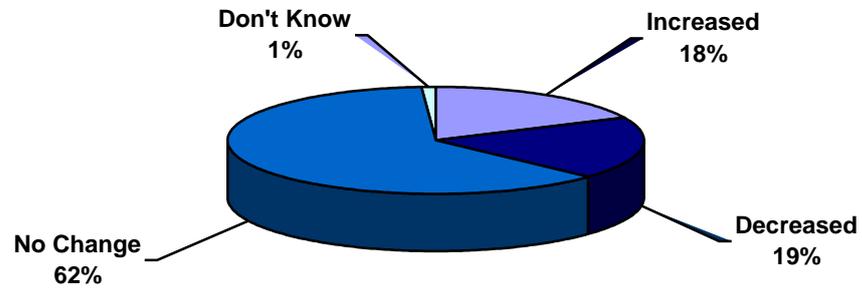
Figure 4.7 Proportion of Employers Reporting Increase, Decrease or No Change in Requirement for People on Short Term Contracts Since Previous Year, by Sector



Base 1,432

Employers were also asked whether they had experienced any change in their requirement for permanent employees over the past twelve months. **Figure 4.8** shows that the majority (62%) report no change, 19% an increase, and 18% a decrease.

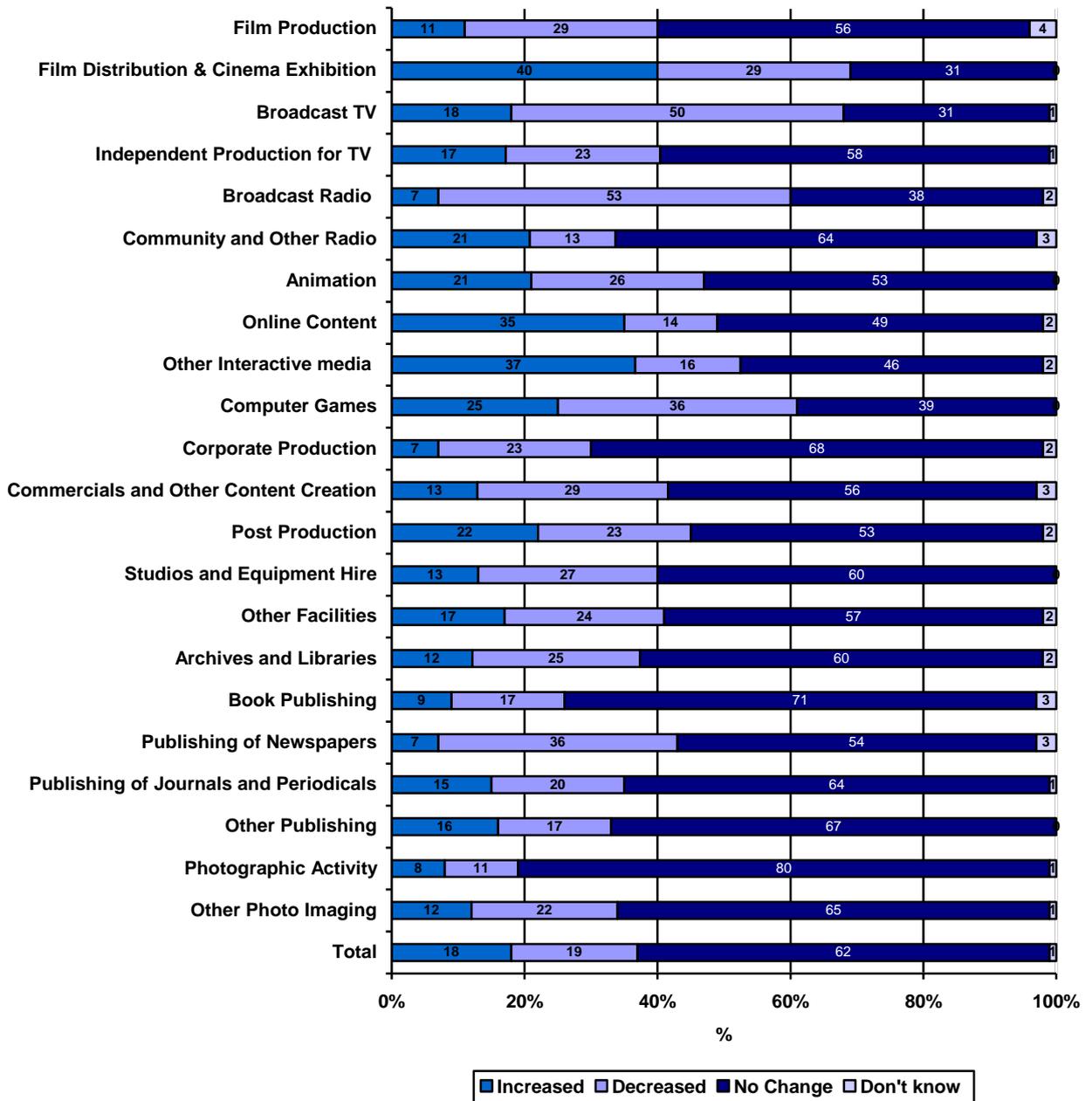
Figure 4.8 Proportion of Employers Reporting Increase, Decrease or No Change in Requirement for Permanent Employees Since Previous Year



Base 1,432

Comparing by sector (**Figure 4.9**), the proportion of employers reporting an increase in their requirement for employees is highest in cinema exhibition (40%), Other Interactive Media (37%), and Online Content (35%). A substantially higher than average proportion of employers report a decrease in Broadcast Radio (53%) and broadcast TV (50%).

Figure 4.9 Proportion of Employers Reporting Increase, Decrease or No Change in Requirement for Permanent Employees Since Previous Year, by Sector



Base 1,432

Vacancies

The survey asked employers whether they have any vacancies at the time of completing the survey. The vast majority - 84% - do not; 15% said that they do and 1% are not sure.

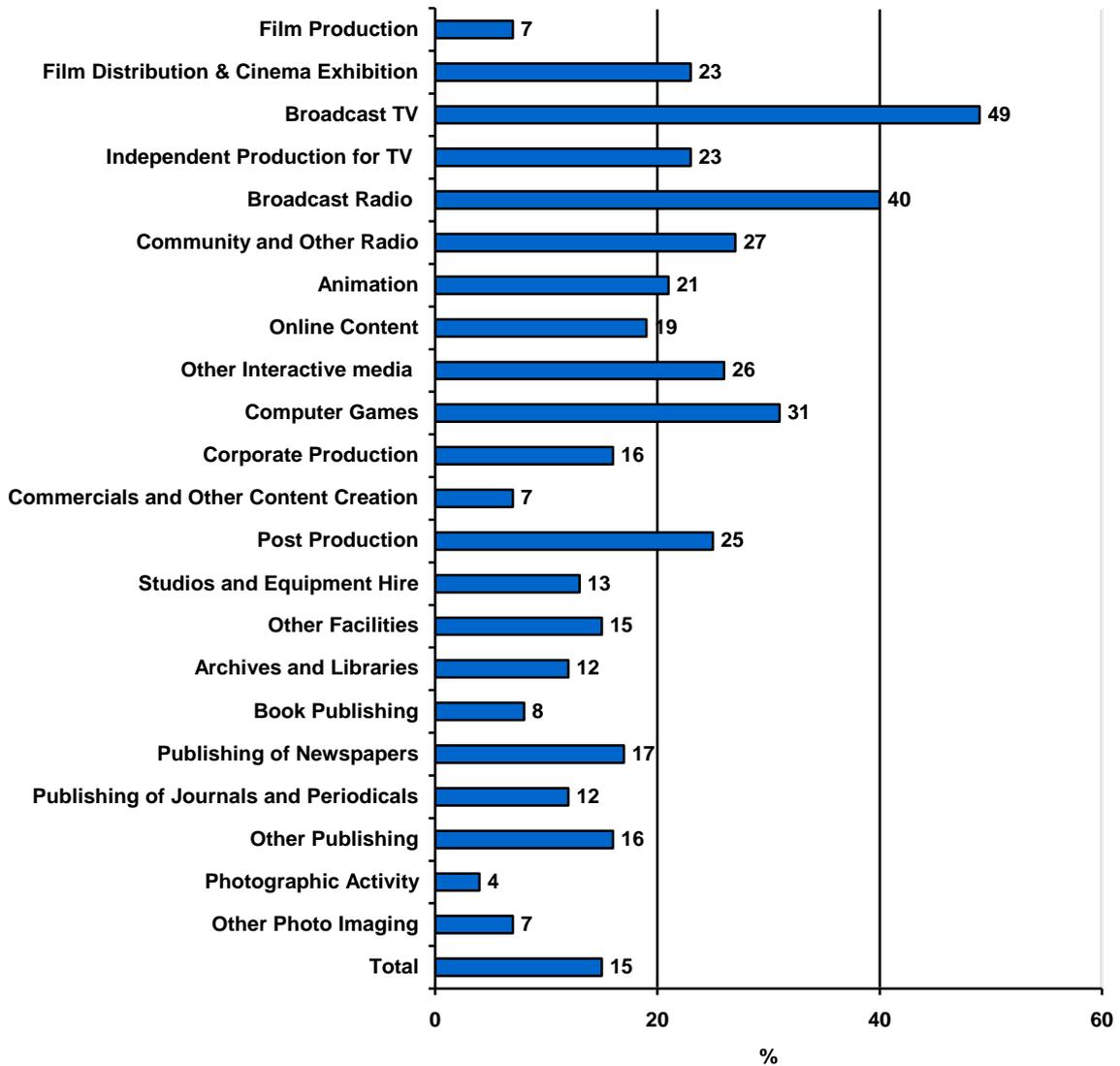
There is considerable variation in the reporting of vacancies by sector, as can be seen from **Figure 4.10**. To a large extent, the likelihood of vacancies correlates with company size, so that for example, employers in broadcast TV (49%), Broadcast Radio (40%), and Computer

Games (31%) are most likely to have vacancies at the time of the survey, as they are among the sectors with the largest establishments. Conversely, the sectors in which fewest employers report vacancies are Photographic Activity (4%), Other Photo Imaging, Film Production and Commercials and other content creation (all 7%). These sectors are both among the smallest in terms of establishment size, and in the latter cases are also heavily freelance-dependent so that employment vacancies may be less of an issue.

Comparatively, the National Employer Skills Survey 2009 suggests a lower percentage of reported vacancies by employers (10%). In England there were some 7,500 vacancies amongst Creative Media and Fashion and Textiles employers at the time of the survey, around a third of which were in Associate Professional and Technical occupations (2,500) and a fifth each in Sales and Customer Service (1,300) and Administrative and Secretarial (1,200). This amounts to vacancies within 10% of all establishments across Creative Media and Fashion and Textiles (compared to 12% of establishments in all other sectors in England). The Skillset sourced figure of 15% is more likely to reflect the percentage of vacancies due to the limitations of the data extracted from NESS for the Creative Media sector.¹³

¹³ NESS 2009 as reported in the UK Employment and Skills Almanac 2010. These figures exclude many of those working in Interactive Media, Content for Computer Games, Facilities and freelancers. Figures for Fashion and Textiles are also aggregated with Creative Media in the total.

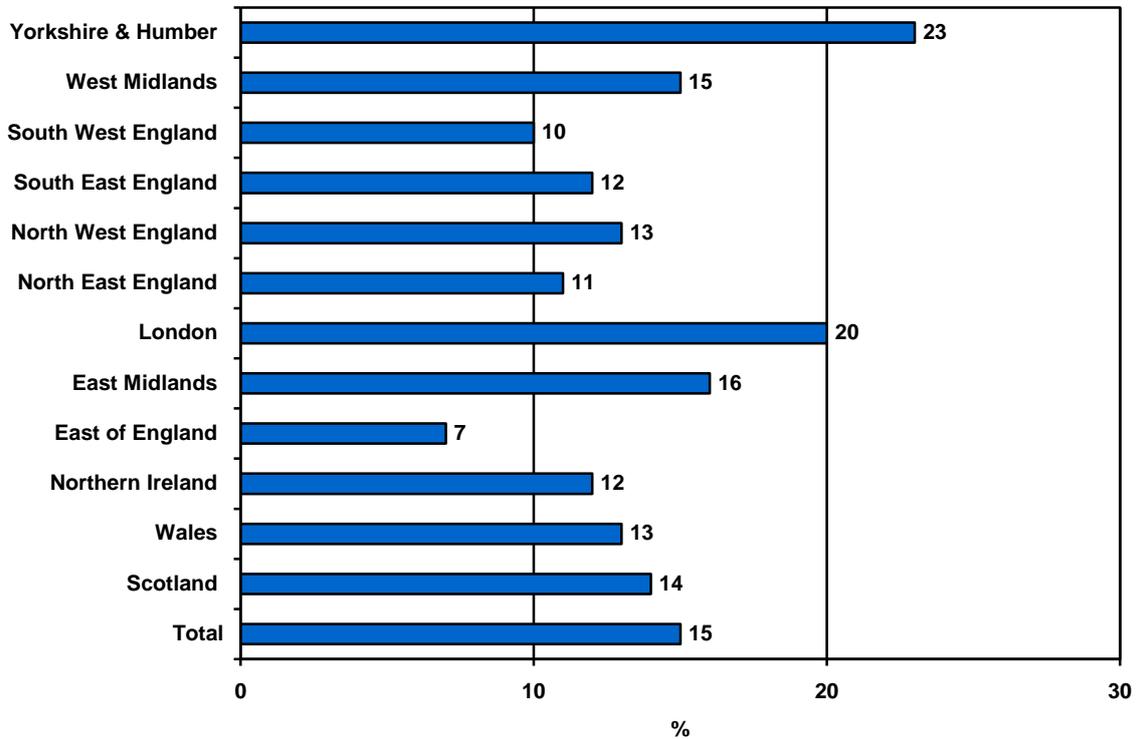
Figure 4.10 Proportion of Employers Reporting Current Vacancies by Sector



Base 2,634

Figure 4.11 shows the percentages of employers reporting vacancies by nation and region. The regions with the highest proportion of vacancies was Yorkshire and Humber (23%) followed by London (20%). Employers in the East Midlands (7%) were the least likely to report a current vacancy.

Figure 4.11 Proportion of Employers Reporting Current Vacancies by Nation and Region



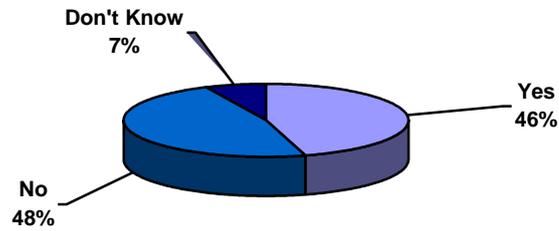
Base 2,634

As would be expected, and as was the case with recruitment, the prevalence of vacancies correlates very strongly with company size, so that 53% of medium and large employers, 31% of small employers and 9% of micro-businesses report vacancies.

Skills Shortages

The survey asked those employers with current vacancies whether they found any of them hard to fill. **Figure 4.12** shows approximately equal proportions saying that they do (46%) and do not (48%), with 7% unsure.

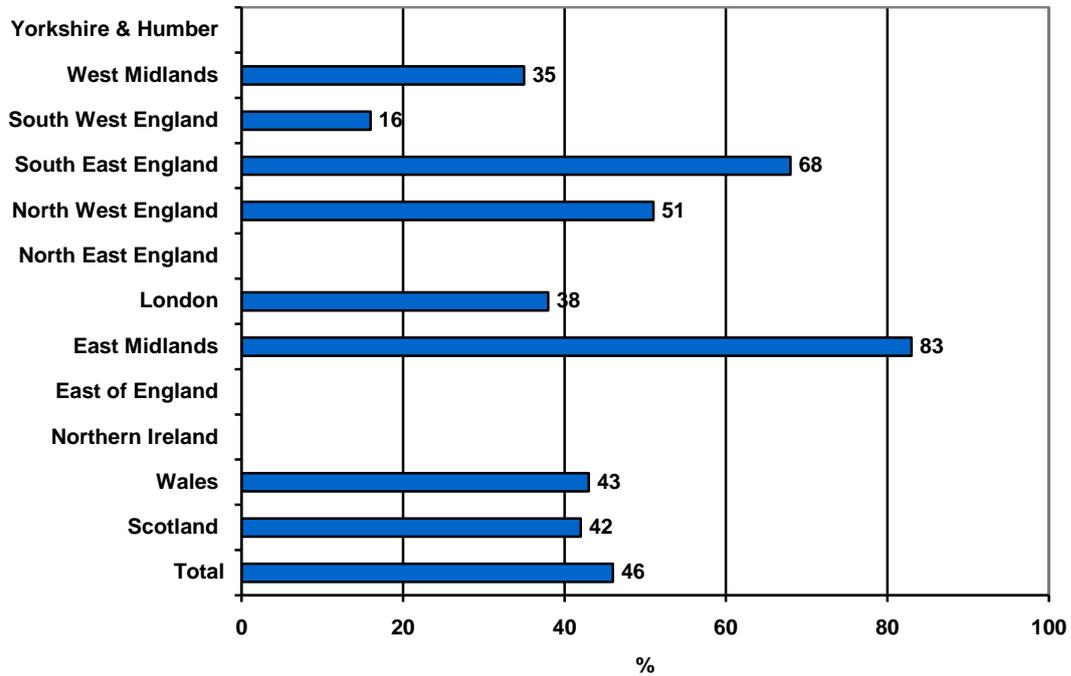
Figure 4.12 Proportion of Employers with Vacancies Finding Any of them Hard to Fill



Base 451

Response numbers do not permit analysis of data on hard-to-fill vacancies by sub sector. However, they do enable analysis by nation and region, and this is shown in **Figure 4.13**. This indicates those areas with the highest proportions of employers with hard-to-fill vacancies to be the East Midlands (83%), the South East (68%), and North West England (51%).

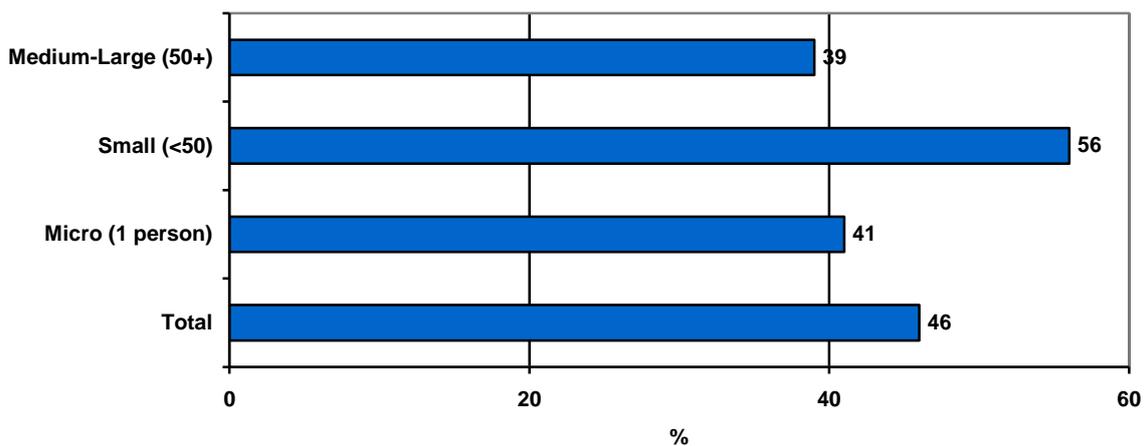
Figure 4.13 Proportion of Employers with Vacancies Finding Any of them Hard to Fill, by Nation or Region



Base 451

Figure 4.14 shows that a higher percentage of small employers (56%) have hard to fill vacancies than either micro-businesses (41%) or medium-large employers (39%).

Figure 4.14 Proportion of Employers with Vacancies Finding Any of them Hard to Fill, by Size



Base 451

Employers reporting hard-to-fill vacancies were asked to state in which occupations these were occurring. **Figure 4.15** lists the top ten occupations cited across the board.

Figure 4.15 Top Ten Occupations in which Vacancies are Proving Hard to Fill

Occupation	%
Distribution, Sales and Marketing	38%
Technical Development	27%
Art and Design	17%
Business Management	13%
Production	9%
Content Development	7%
Strategic Management	6%
Editing	2%
Animators	2%
Editorial, Journalism and Sport	2%
Engineering and Transmission	2%
<i>Base</i>	202

Respondents with hard-to-fill vacancies were then asked why they were hard to fill. The proportion citing each reason is shown in **Figure 4.16**. This shows the most common reason to be that applicants lack the skills or talent that the company demands, cited by 82%. Around two thirds say that applicants lack relevant work experience, and a similar proportion that there have been a low number of applicants with the required attitude, motivation or personality. Nearly a quarter say that there are other reasons to do with the nature of work or where it is based, and around one sixth that applicants lack relevant qualifications.

Figure 4.16 Proportion of Employers Reporting Each Reason for Vacancies Being Hard to Fill

Reason	%
Applicants lack the skills or talent the company demands	82
Applicants lack relevant qualifications	16
Applicants lack relevant work experience	67
There have been a low number of applicants with the required attitude, motivation or personality	65
Other reasons to do with the nature of the work, or where it is based	24
Don't know	2
<i>Base</i>	202

The National Employer Skills Survey 2009 comparatively also shows that just over a fifth of the vacancies reported by employers in England were hard to fill (1,700 in total). This equates to 3% of all employers but again the Skillset figure is preferred due to limitations in scope of NESS data for the Creative Media sector.¹⁴ Approximately 1,200 of these hard to fill vacancies were perceived to be due to skills shortages (2% of establishments) and the main skills found difficult to obtain were technical, practical or job specific skills (71% of skills shortage vacancies), customer handling skills (45%) and written communication skills (44%).¹⁵

Employers that identified 'other reasons to do with the nature of the work, or where it is based' were then asked whether there were any other reasons for experiencing hard-to-fill vacancies. **Figure 4.17** reports the percentage citing each. The most common issues are a shortage of applicants in the area(s) in which the company was based (50%) and a low number of applicants generally (45%).

¹⁴ NESS 2009 as reported in the UK Employment and Skills Almanac 2010. These figures exclude many of those working in Interactive Media, Content for Computer Games, Facilities and freelancers. Figures for Fashion and Textiles are also aggregated with Creative Media in the total.

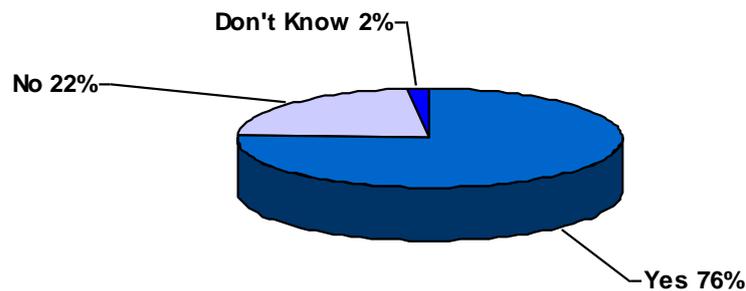
¹⁵ Ibid

Figure 4.17 Proportion of Employers Reporting Other Causes for Vacancies Being Hard to Fill

Reason	%
Not enough people interested in this type of work	20
Low number of applicants generally	45
Fees or salary offered not sufficient	22
Shortage of applicants in the areas where we are based	50
Too much competition from other employers	14
Poor career progression/lack of prospects	2
Job entails shift work/unsociable hours	4
Poor quality of applicants	5
Other	15
Don't know	1
None	8
<i>Base</i>	52

Those employers reporting hard-to-fill vacancies were asked whether they had taken any specific actions to overcome their difficulties. Just over three quarters (76%) say that they have.

Figure 4.18 Proportion of Employers with Hard to Fill Vacancies Taking Any Specific Actions to Overcome Difficulties



Base 202

Finally in this section, respondents who said they had taken action to overcome difficulties resulting from hard-to-fill vacancies were asked what form that action had taken. By far the

most common measure taken is using new recruitment methods or channels, reported by 61% of employers. The next most common is increasing advertising or recruitment spend (38%), followed by increasing or expanding trainee programmes (26%). No other action was cited by more than a quarter of respondents.

Figure 4.19 Proportion of Employers Taking Actions to Overcome Difficulties Resulting from Hard-to-Fill Vacancies

Action	%
Increasing salaries	16
Skilling up the existing workforce	24
Redefining existing jobs	11
Increasing advertising or recruitment spend	38
Increasing or expanding trainee programmes	26
Recruiting from overseas	8
Using new recruitment methods or channels	61
Using Freelancers	2
Cover work ourselves	2
Alter job descriptions for vacancies	2
Other	6
Don't know	*
<i>Base</i>	156

5 Current Skill Needs

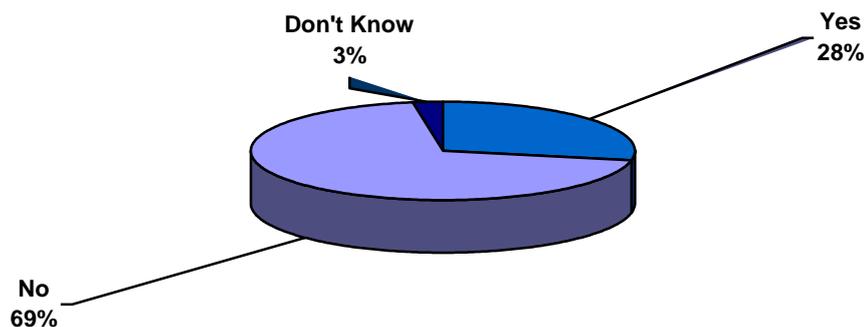
This section covers current skills needs reported by employers, including specifically:

- Extent and nature of skills gaps
- Causes of skills gaps
- Effects of skills gaps
- Actions taken to address skills gaps

Extent and Nature of Skills Gaps

First in this section, the survey asked employers whether there is a gap between the existing skills of their workforce and those that they need to meet their business objectives. As shown in **Figure 5.1**, 28% say that there is, 69% that there is not, and 3% either that they do not know or have had no employees in the past twelve months.

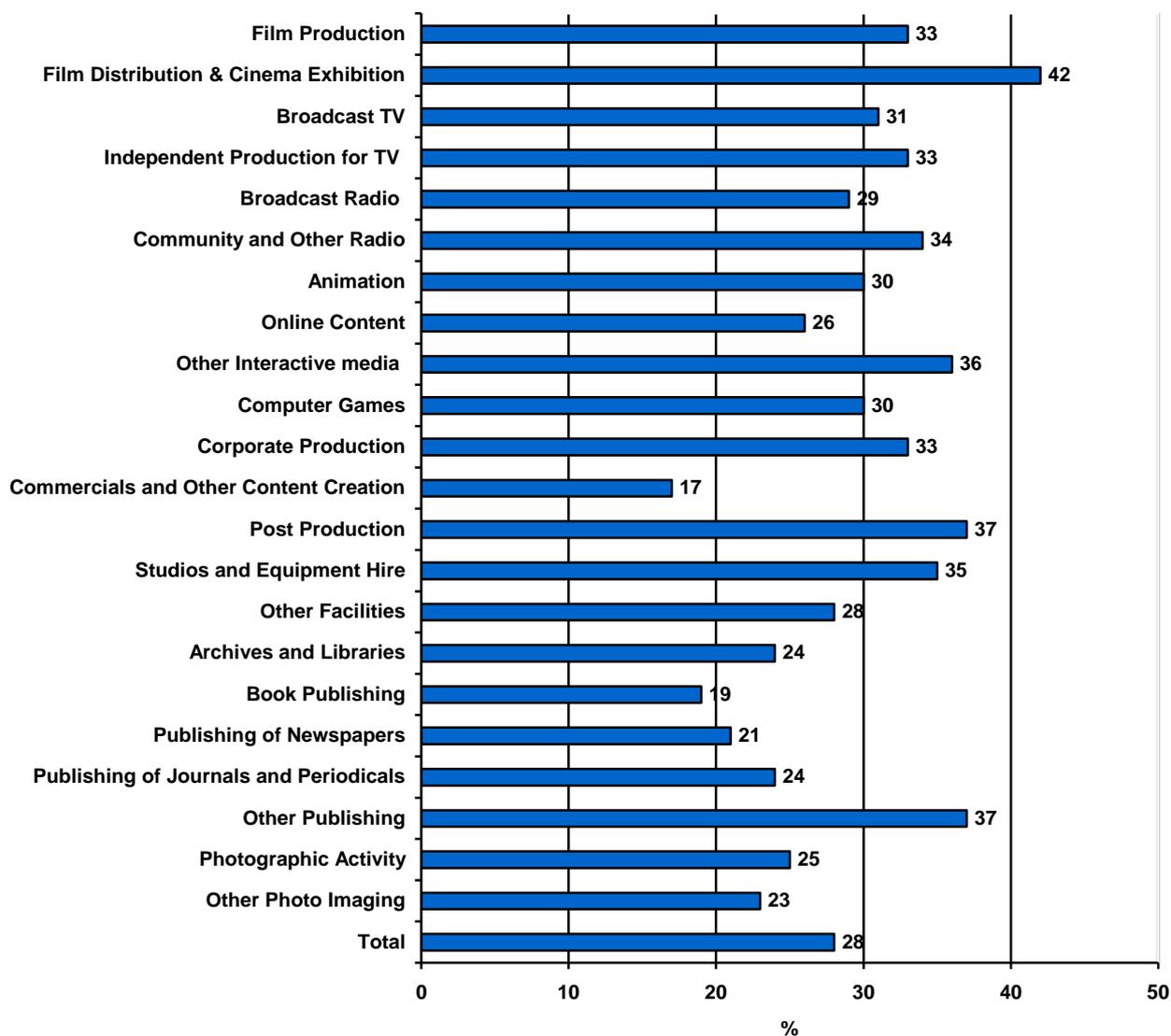
Figure 5.1 Proportion of Employers Reporting Current Skills Gaps Among Their Workforce



Base 2,490

Figure 5.2 shows the percentage of employers reporting skills gaps by sector, and reveals some substantial differences. A far higher than average proportion of employers in all sectors within Film and Television, and to a lesser extent within Radio, report skills gaps. This is also true of all sectors within Post Production with the exception of Archives and Libraries. Conversely, a lower than average percentage of all employers within Publishing and Photo Imaging report skills gaps, with the exception of Other Publishing.

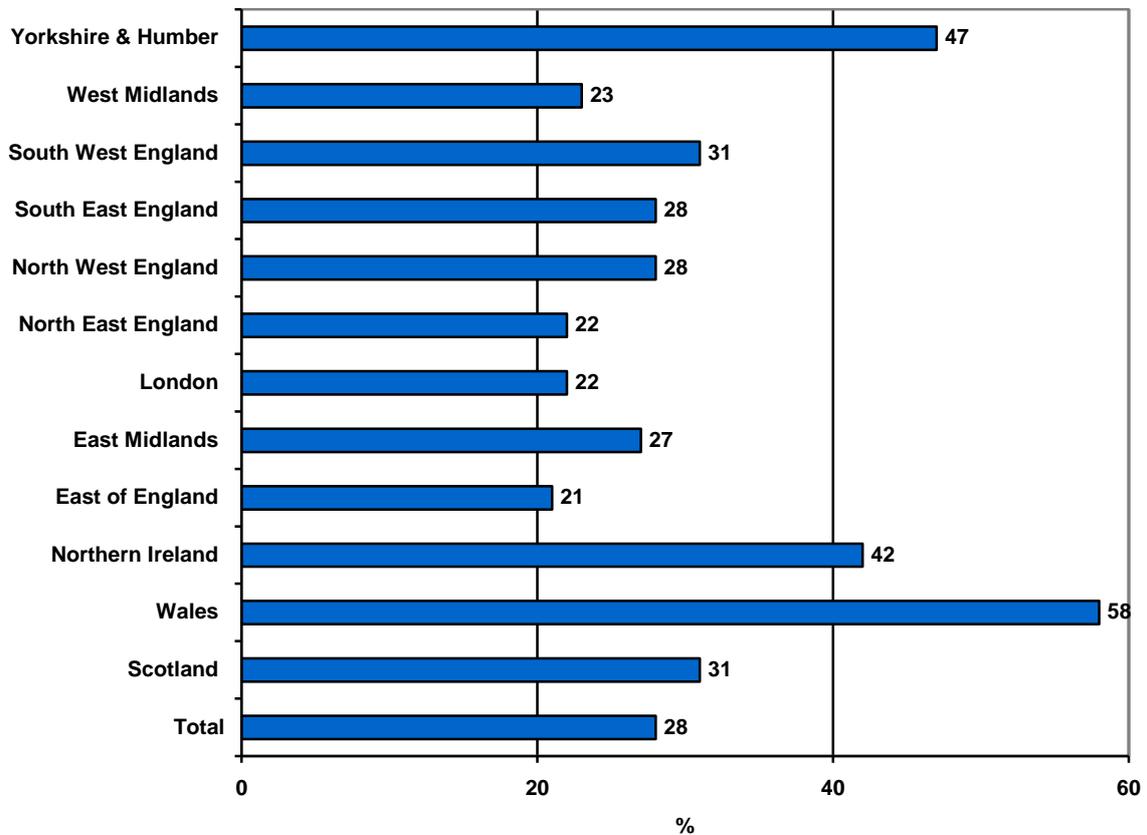
Figure 5.2 Proportion of Employers Reporting Current Skills Gaps Among Their Workforce by Sector



Base 2,490

There are also some considerable differences across the UK in respect of reporting of skills gaps, as can be seen in **Figure 5.3**. Higher than average proportions of employers in Wales (58%), Northern Ireland (42%) and Scotland (31%) report skills gaps. Within England, the proportion of employers with skills gaps is much higher in Yorkshire and the Humber than anywhere else (47%), and significantly lower in the East of England (21%), London (22%), North East England (22%), and the West Midlands (23%). All other regions cluster around the UK average of 28%.

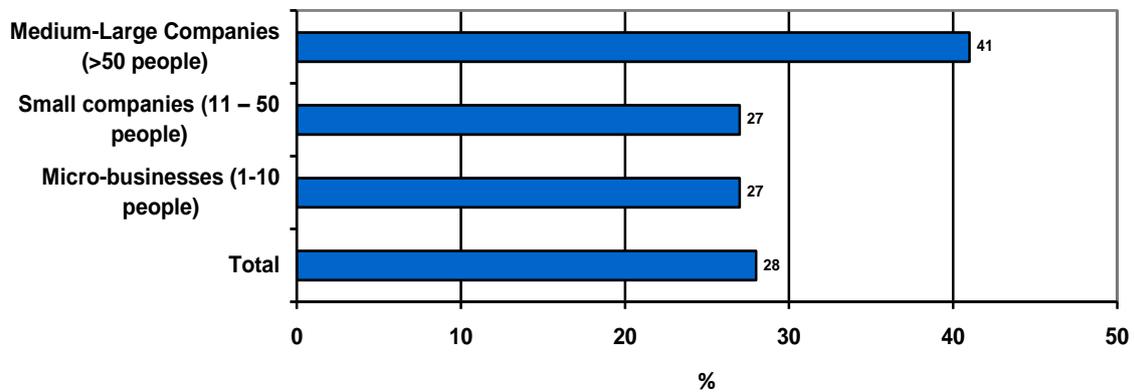
Figure 5.3 Proportion of Employers Reporting Current Skills Gaps Among Their Workforce by Nation/Region



Base 2,490

As would perhaps be expected given their employment of more people and a wider range of skill areas, larger employers are also more likely than average to report skills gaps. **Figure 5.4** shows that 41% of medium-large employers are experiencing skills gaps, compared with the average of 28%.

Figure 5.4 Proportion of Employers Reporting Current Skills Gaps Among Their Workforce by Company Size

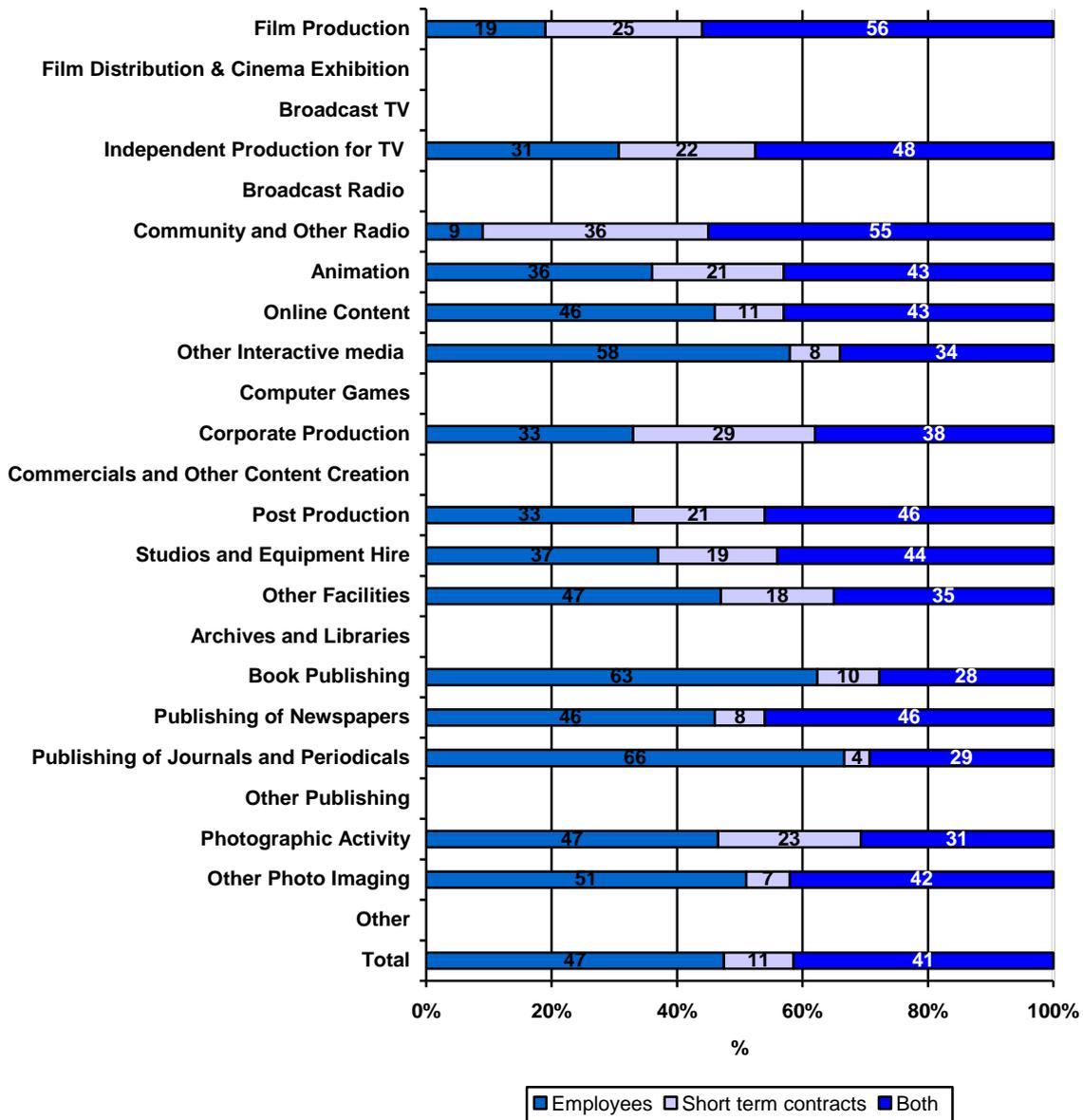


Base 2,490

Employers who reported skills gaps were asked whether these existed for employees, people on short term contracts, or both. **Figure 5.5** shows the proportions indicating each option. In some sectors, the response was not sufficiently high to report data; in these cases, data are omitted.

In sectors within Interactive Media, Publishing and Photo Imaging, the majority of skills gaps exist either among employees only or among both employees and people on short term contracts – for example, only 4% of skills gaps within Publishing of Journals and Periodicals and 7% of those within Other Photo Imaging exist among people on short term contracts only. The prevalence of skills gaps among people on short term contracts tends to reflect the levels of freelance usage within sectors – for example, 36% of Community Radio stations, 29% of Corporate Production employers, and 25% of Film Production employers report skills gaps among people on short term contracts only – all heavily freelance-dependent sectors.

Figure 5.5 Proportion of Employers Reporting Current Skills Gaps Among Employees, Those on Short Term Contracts, or Both, by Sector



Base 715

Employers who reported skills gaps were asked what form these took. The most common skills gap is in sales and marketing (61%), followed by technical skills (48%), and skills in using specific software applications (46%). Employers that identified technical skills specified computer programming and computer/software usage as the most common technical skills gaps.

Figure 5.6 shows the percentage citing each type of skills gap, by sector. Unfortunately it is not possible to present the data for many sectors due to low response numbers, and even where data are shown they should be treated with caution as response numbers are relatively low in every case.

Figure 5.6 Proportion of Employers Reporting Specific Skills Gaps, by Sector

	Skills to develop content for multiple platforms	Leadership and Management Skills	Sales and Marketing Skills	Business skills	Finance skills	Technical skills	Set Crafts Skills	Production skills	Creative talent e.g. directing, writing, producing	Skills in using software packages	Multi-skilling	Other	Don't know	Base
	%	%	%	%	%	%	%	%	%	%	%	%	%	<i>n</i>
Film Production	47	56	66	81	59	34	15	41	48	50	43	16	12	26
Film Distribution & Cinema Exhibition	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	6
Broadcast TV	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	14
Independent Production for TV	29	46	46	30	24	46	18	30	41	43	35	24	13	66
Broadcast Radio	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	18
Community and Other Radio	41	51	77	54	48	43	7	36	28	40	39	42	17	21
Animation	41	25	35	31	27	47	28	33	33	43	41	22	12	34
Online Content	33	44	48	36	17	50	6	13	21	39	22	13	10	100
Other Interactive Media	25	44	62	29	29	52	0	3	14	32	19	14	20	55
Computer Games	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	15
Corporate Production	29	36	44	32	27	48	5	16	29	37	32	18	7	30
Commercials and Other Content Creation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	10
Post Production	9	39	35	33	24	54	19	5	11	54	43	21	12	20
Studios and Equipment Hire	16	51	69	57	32	38	21	23	16	35	35	18	16	32
Other Facilities	33	43	40	33	21	42	27	16	12	40	51	39	9	24
Archives and Libraries	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	8

Book Publishing	29	29	53	14	34	38	11	4	19	54	19	5	17	21
Publishing of Newspapers	29	12	37	7	10	30	1	19	31	50	17	8	12	34
Publishing of Journals and Periodicals	29	29	59	25	27	48	9	2	20	29	23	16	14	53
Other Publishing	n/a	17												
Photographic Activity	11	38	69	34	33	52	17	15	19	67	37	15	15	87
Other Photo Imaging	18	34	75	38	22	41	23	2	21	63	34	27	24	21
Total	25	40	61	36	26	48	10	12	21	46	31	22	15	715

Base 715

Employers reporting skills gaps in 'skills to develop content for multiple platforms', 'business skills', 'technical skills' and 'production skills' were asked to specify the gap(s) they were experiencing. Of those employers identifying a 'technical' skills gap 14% specified that this was in computer programming and 10% within computer and software usage. A full breakdown of the gaps specified by employers is available at **Appendix A**.

Respondents in Wales that identified skills gaps were also asked if gaps in Welsh language skills existed within their workforce; just over a third (34%) of Welsh respondents reported that it was.

Employers reporting skills gaps among employees or people on short term contracts were asked in which occupational group these existed. The top ten occupational groups in which skills gaps were reported among employees and people on short term contracts are shown in **Figure 5.7**. To a large extent, these are the same areas reported as hard-to-fill vacancies in **Section 4** (see **Figure 4.15**), with occupations in groups such as distribution, sales and marketing, business management, strategic management, art and design and technical development featuring heavily.

The National Employer Skills Survey 2009 shows 15% of Creative Media establishments report a skills gap, a total of 35,500 skills gaps were identified most commonly in Administrative and Secretarial and Sales and Customer Service occupations which represents 7% of the workforce.¹⁶

¹⁶ NESS 2009 as reported in the UK Employment and Skills Almanac 2010. These figures exclude many of those working in Interactive Media, Content for Computer Games, Facilities and freelancers. Figures for Fashion and Textiles are also aggregated with Creative Media in the total.

Figure 5.7 Top Ten Occupational Groups in which Skills Gaps are Reported Among Employees and Those Short Term Contracts

Employees		Short Term Contracts	
Occupational Group	%	Occupational Group	%
Distribution, Sales and Marketing	22	Art and Design	16
Business Management	16	Distribution, Sales and Marketing	15
Strategic Management	14	Technical Development	13
Art and Design	13	Camera – Photography	12
Technical Development	13	Business Management	12
Production	11	Production	8
Camera – Photography	6	Engineering and Transmission	5
Editorial, Journalism and Sport	5	Editing	5
Content Development	5	Strategic Management	4
Engineering and Transmission	4	Editorial, Journalism and Sport	4
<i>Base</i>	574	<i>Base</i>	372

Causes of Skills Gaps

Employers reporting skills gaps were asked which of a range of causes was responsible for creating them. The proportions citing each overall and within each sector are reported in **Figure 5.8**. Data are not available for every sector due to low response numbers. Across the board, the most common causes are lack of experience or staff being recently recruited, cited by 24%, failure to train and develop staff (21%), and recruitment problems (20%), while 22% of employers reported other causes not listed on the survey. Lack of experience or staff being recently recruited is cited by more employers than average in community and other Radio (53%), Film Production (36%), Independent Production for Television (36%) and Corporate Production (35%). This may be because these are all areas in which levels of freelancing are relatively high and partly as a result, in which labour turnover may also be higher than average.

Figure 5.8 Proportion of Employers Reporting Each Main Cause of Skills Gaps, by Sector

	Failure to train and develop staff	Recruitment problems	High staff turnover	Inability of workforce to keep up with change	Lack of experience or staff being recently recruited	Staff lack motivation	Current economic climate/recession	Problems with education	Other	Don't know	Base
	%	%	%	%	%	%	%	%	%	%	<i>n</i>
Film Production	34	3	0	10	36	13	10	18	22	3	26
Film Distribution & Cinema Exhibition	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	6
Broadcast TV	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	14
Independent Production for TV	24	5	2	23	36	11	9	7	32	1	66
Broadcast Radio	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	18
Community and Other Radio	14	12	0	0	53	7	3	3	35	0	21
Animation	18	5	1	21	15	0	5	16	31	3	34
Online Content	23	11	5	25	24	4	3	10	20	10	100
Other Interactive Media	12	12	0	25	25	3	3	8	21	10	55
Computer Games	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	15
Corporate Production	16	14	3	24	35	11	16	8	16	3	30
Commercials and Other Content Creation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	10
Post Production	37	19	0	13	19	12	6	15	23	0	20
Studios and Equipment Hire	18	7	0	5	51	3	14	10	15	7	32
Other Facilities	12	3	0	17	30	9	3	18	21	15	24

Archives and Libraries	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	8
Book Publishing	36	3	0	14	15	11	13	11	24	11	21
Publishing of Newspapers	41	18	0	9	14	0	9	17	3	7	34
Publishing of Journals and Periodicals	20	12	7	35	27	10	6	7	21	8	53
Other Publishing	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	17
Photographic Activity	29	3	0	22	27	3	6	15	13	3	87
Other Photo Imaging	19	10	7	11	10	7	7	16	14	21	21
Total	21	7	2	20	24	8	6	10	22	10	715

Base 715

Effects of Skills Gaps

Employers reporting skills gaps were asked what effect these had had on their company. **Figure 5.9** reports the percentages of employers citing each effect overall, and by sector. The most common effect reported overall is delays developing new products or services, reported by 63%, followed by outsourcing work that would preferably be done in-house (48%), increased operating costs (47%), and losing business or orders to competitors (43%). Only 1% of employers said their skills gaps were not causing any problems. Comparing between sectors, increased operating costs is more commonly cited by sectors within Film and Television and related sectors, and less often reported by employers in Publishing and Photo Imaging. This is also the case with outsourcing of work that would preferably be done in-house. Difficulty meeting quality standards is a particular issue for Film Production employers, cited by 68%.

Figure 5.9 Proportion of Employers Reporting Each Effect of Skills Gaps

	Lose business or orders to competitors	Delay developing new products or services	Experience difficulty meeting quality standards	Increase operating costs	Outsource work you would prefer to keep in-house	Other	Don't know	No particular problems caused	Base
	%	%	%	%	%	%	%	%	<i>n</i>
Film Production	40	62	68	59	41	9	0	7	26
Film Distribution & Cinema Exhibition	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	6
Broadcast TV	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	14
Independent Production for TV	26	64	31	53	52	8	0	6	66
Broadcast Radio	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	18
Community and Other Radio	44	48	60	30	48	9	0	4	21
Animation	49	52	50	67	60	12	0	2	34
Online Content	46	67	42	53	53	5	1	9	100
Other Interactive Media	29	52	23	34	39	2	3	15	55
Computer Games	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	15
Corporate Production	44	59	37	62	73	11	3	0	30
Commercials and Other Content Creation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	10
Post Production	20	30	50	38	49	4	6	4	20
Studios and Equipment Hire	41	54	44	54	33	0	0	11	32
Other Facilities	44	58	54	58	61	14	0	7	24
Archives and Libraries	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	8

Book Publishing	45	64	31	26	40	0	0	11	21
Publishing of Newspapers	54	46	62	17	14	2	0	10	34
Publishing of Journals and Periodicals	40	77	31	43	52	14	1	2	53
Other Publishing	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	17
Photographic Activity	43	56	28	43	45	9	0	15	87
Other Photo Imaging	54	56	49	37	55	3	2	2	21
Total	43	63	38	47	48	5	1	11	715

Base 715

Actions Taken to Address Skills Gaps

Employers experiencing skills gaps were asked whether they had taken any actions to address them. Nearly three quarters (71%) say that they have, 28% that they haven't and 1% don't know.

The proportion of employers taking action to address skills gaps varies considerably by sector. Higher than average percentages of all sectors in Radio, Television, Animation, Interactive Media, Computer Games and Corporate Production report taking actions to address skills gaps. In Film, the picture is mixed, with Film Distribution and Exhibition containing the highest proportion of employers taking actions (91%), but Film Production among the lowest at 67%. The picture is also complex among the Facilities sectors, with 76% of Studio and Equipment Hire employers taking actions, compared with only 64% of Post Production employers.

All sectors within Publishing are relatively close to the average of 72%, while both Photo Imaging sectors contain below average proportions of employers taking action. The sector with the smallest proportion of employers acting to address skills gaps is Commercials and Other Content Creation, at 47%.

Finally in this section, employers who had taken actions to address skills gaps were asked what form these actions took. **Figure 5.10** shows the proportion taking each type of action by sector. In many instances, response numbers are too low to allow data to be reported. Overall, the most common type of intervention reported is skilling up the current workforce, reported by 69% of employers. 54% of employers report increasing or expanding trainee programmes and 40% redefining existing jobs. No other intervention is reported by more than one in ten respondents. There is no discernible pattern among or between sectors, especially taking into account non-availability of data in many areas.

Figure 5.10 Proportions of Employers Taking Each Type of Action to Address Skills Gaps, by Sector

	Skilling up the existing workforce	Redefining existing jobs	Increasing or expanding trainee programme	Changing recruitment practices	Outsourcing work	Other	Don't know	Base
	%	%	%	%	%	%	%	<i>n</i>
Film Production	n/a	n/a	n/a	n/a	n/a	n/a	n/a	18
Film Distribution & Cinema Exhibition	n/a	n/a	n/a	n/a	n/a	n/a	n/a	5
Broadcast TV	n/a	n/a	n/a	n/a	n/a	n/a	n/a	11
Independent Production for TV	77	43	61	15	1	15	0	49
Broadcast Radio	n/a	n/a	n/a	n/a	n/a	n/a	n/a	15
Community and Other Radio	n/a	n/a	n/a	n/a	n/a	n/a	n/a	19
Animation	79	34	48	9	10	6	0	28
Online Content	56	33	42	16	6	8	6	71
Other Interactive Media	61	33	56	6	8	8	0	44
Computer Games	n/a	n/a	n/a	n/a	n/a	n/a	n/a	10
Corporate Production	68	35	39	21	18	7	3	21
Commercials and Other Content Creation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	6
Post Production	n/a	n/a	n/a	n/a	n/a	n/a	n/a	13
Studios and Equipment Hire	83	50	70	0	5	17	0	24
Other Facilities	n/a	n/a	n/a	n/a	n/a	n/a	n/a	16

Archives and Libraries	n/a	n/a	n/a	n/a	n/a	n/a	n/a	6
Book Publishing	n/a	n/a	n/a	n/a	n/a	n/a	n/a	15
Publishing of Newspapers	55	29	66	16	0	22	0	27
Publishing of Journals and Periodicals	72	37	47	13	9	9	0	37
Other Publishing	n/a	n/a	n/a	n/a	n/a	n/a	n/a	13
Photographic Activity	69	31	54	17	3	13	0	56
Other Photo Imaging	n/a	n/a	n/a	n/a	n/a	n/a	n/a	14
Total	69	40	54	10	4	8	1	520

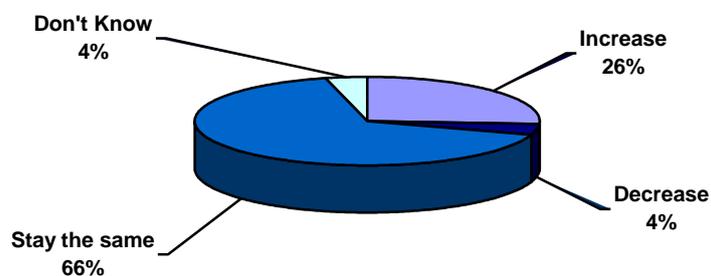
Base 520

6 Future Skill Needs

This section covers employers' anticipated future demand for skills, and those areas in which they predict there may be demand that will be difficult to meet.

This section of the survey first asked employers whether they expect the number of permanent employees in their company to increase, decrease or stay the same over the next twelve months. As can be seen in **Figure 6.1**, around two thirds (66%) of employers say they expect it to remain the same, just over a quarter (26%) that they expect it to increase, and just 4% that they think it will decrease. Employers were then asked the same question regarding the number of people on short term contracts (Figures 6.4 – 6.6).

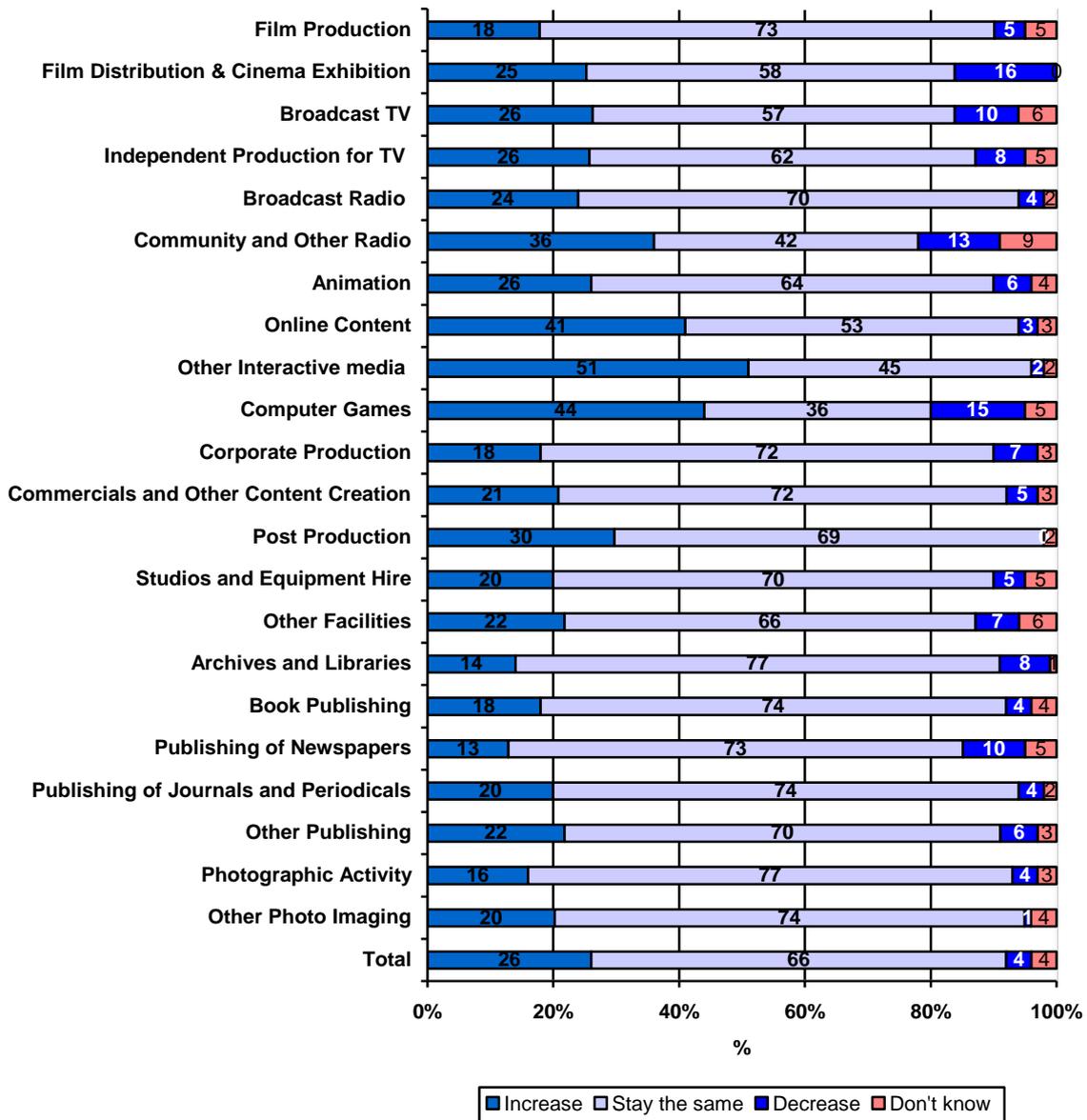
Figure 6.1 Proportion of Employers Expecting Numbers of Employees in their Company to Increase, Decrease or Stay the Same



Base 2,634

Figure 6.2 shows the picture by sector and reveals some considerable differences. In particular, much higher than average percentages of employers in the Interactive Media and games sectors expect employment to increase – 41% of Online Content employers, 51% of Other Interactive Media employers, and 44% of Computer Games, compared with an average of 26%. At the other end of the spectrum, all sectors within Publishing and Photo Imaging contain lower than average proportions of employers expecting employment to increase.

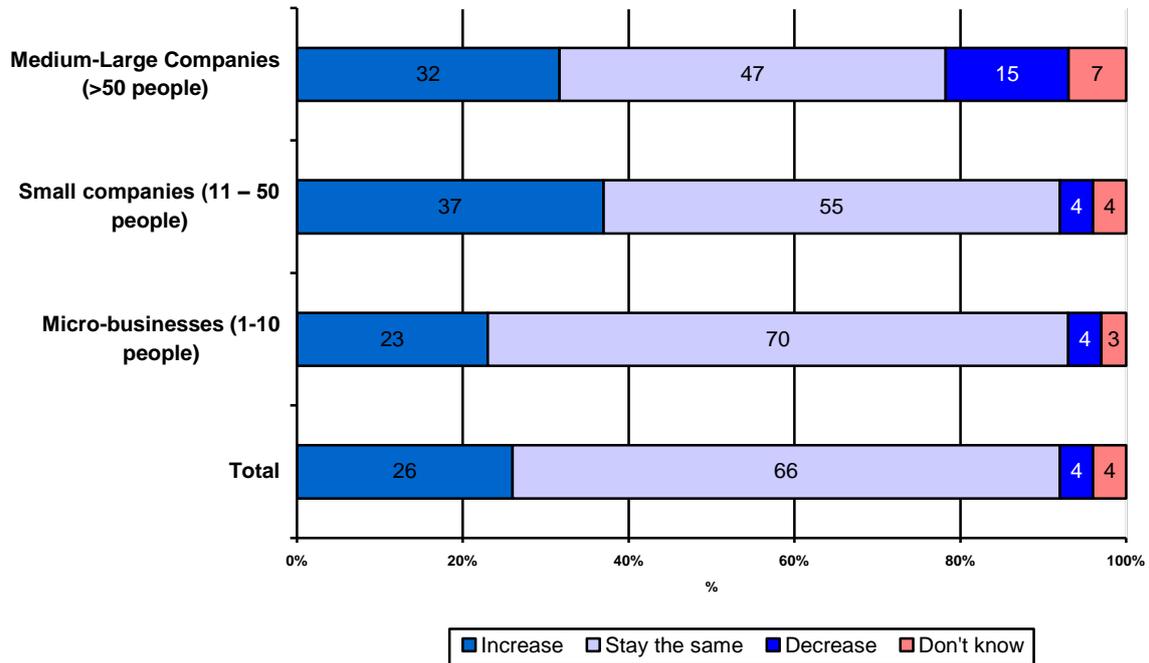
Figure 6.2 Proportion of Employers Expecting Numbers of Employees in their Company to Increase, Decrease or Stay the Same, by Sector



Base 2,634

Small and medium-large employers are more likely than micro-businesses to expect employment to increase in the coming year, as seen in **Figure 6.3**.

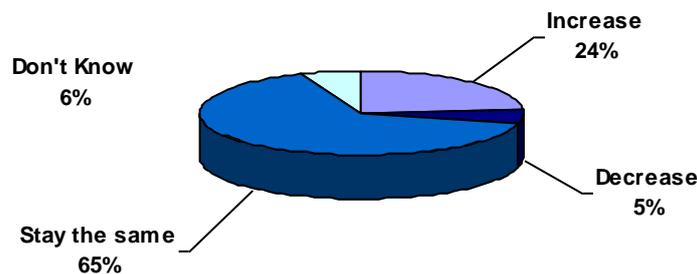
Figure 6.3 Proportion of Employers Expecting Numbers of Employees in their Company to Increase, Decrease or Stay the Same, by Company Size



Base 2,634

Employers were also asked whether they expect the number of people they employed on short term contracts to increase or decrease. Overall, the proportions are almost identical to those in respect of permanent employees, with nearly two thirds expecting no change, nearly a quarter an increase and 5% a decrease.

Figure 6.4 Proportion of Employers Expecting Numbers of People on Short Term Contracts in their Company to Increase, Decrease or Stay the Same

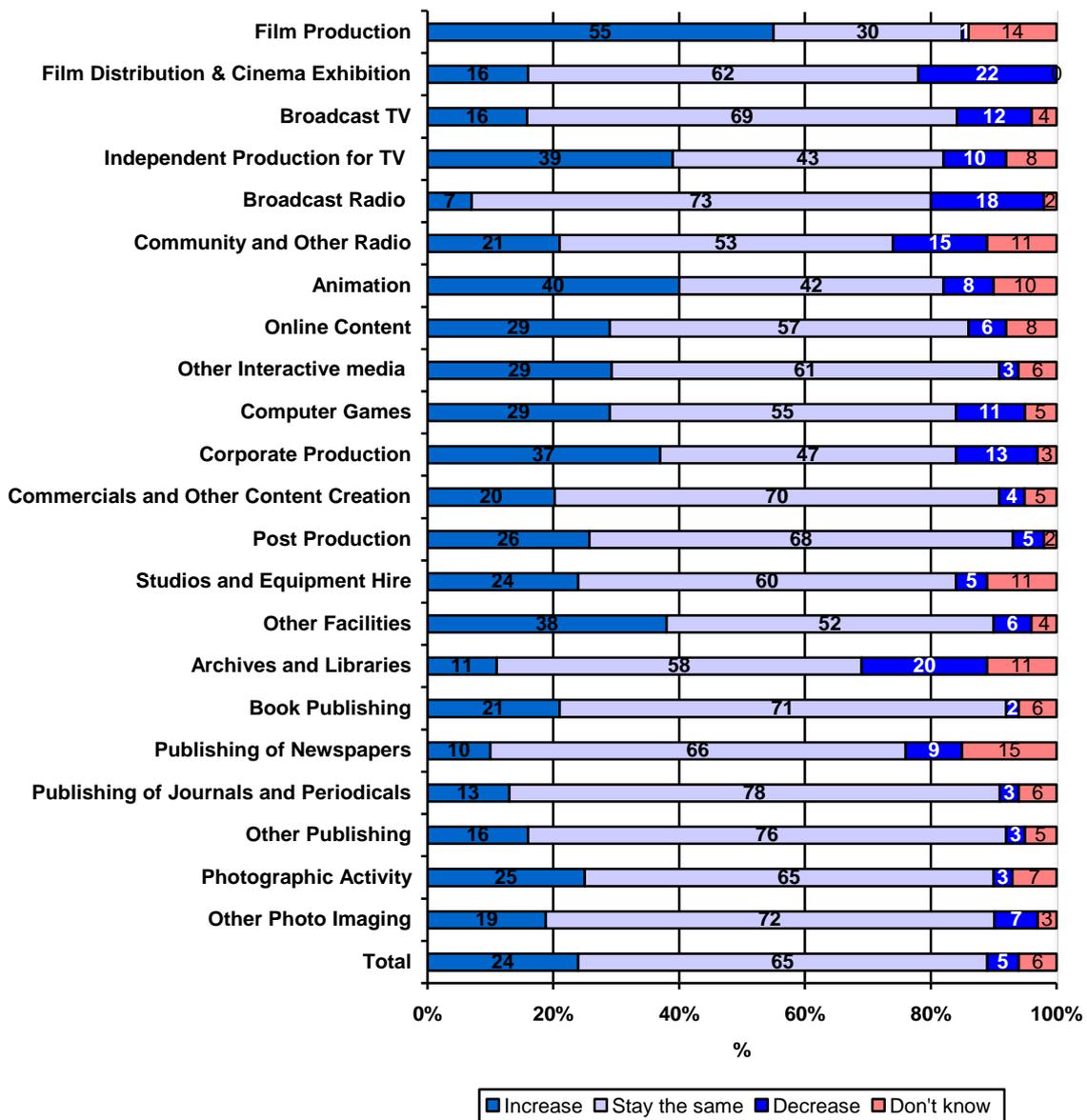


Base 2,634

The comparison by sector is shown in **Figure 6.5**. To a large extent, this reflects sectors' level of usage of freelancers, with those with the heaviest reliance on freelancers more likely to expect usage to increase – for example, 55% of Film Production employers, 40% of Animation employers and 39% of the Independent Production for Television sector. Independent Production for Television is a notable exception to this rule, with only 16%

expecting employment of freelancers to increase. As was the case with permanent employees, a smaller than average proportion of employers within every sector of both Publishing and Photo Imaging expects an increase in employment of people on short term contracts over the next twelve months.

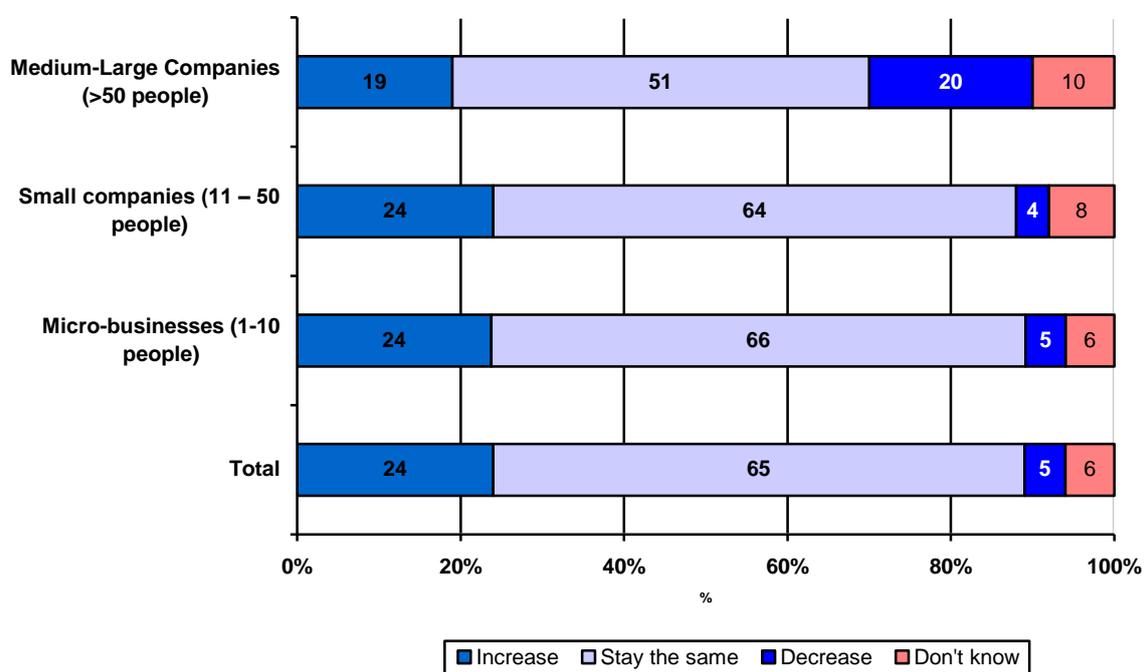
Figure 6.5 Proportion of Employers Expecting Numbers of People on Short Term Contracts in their Company to Increase, Decrease or Stay the Same, by Sector



Base 2,634

Figure 6.6 shows that lower than average proportions of medium-large employers expect an increase in employment of people on short term contracts, and correspondingly a much higher than average percentage (20%) expect a decrease.

Figure 6.6 Proportion of Employers Expecting Numbers of People on Short Term Contracts in their Company to Increase, Decrease or Stay the Same, by Company Size



Base 2,634

Looking further in to the future, respondents were asked whether they expected demand for particular skills to be difficult to meet over the next three to five years. The overall proportion citing each skill area, and the picture by sector is shown in **Figure 6.7**. Overall, the skill area indicated by the highest proportion of employers is sales and marketing (34%), followed by skills using specific software applications (29%), technical skills (25%), multi-skilling (24%), and leadership and management skills (22%).

Employers anticipating that it will be difficult to meet the demand for ‘skills to develop content for multiple platforms’, ‘business skills’, ‘technical skills’ and ‘production skills’ were asked to specify the type of skill. Within the wider category of ‘technical skills’, employers were most likely to specifically mention computer programming. A full breakdown of the skills specified by employers is available at **Appendix B**.

There are some considerable variations by sector. For example, skills using specific software applications are a particular issue for most of the sectors within Publishing and Photo Imaging, as well as Animation and Post Production. In other sectors (for example Film and Commercials), few employers cite this as an issue. Conversely, a lower than average proportion of employers in every area of Publishing and Photo Imaging cite technical skills, but a much higher than average proportion of those in Corporate Production, Commercials and Other Content Creation and Independent Production for Television.

Figure 6.7 Proportion of Employers Predicting Particular Demand for Particular Skills that Will be Difficult to Meet over the Next Three to Five Years, by Sector

	Skills to develop content for multiple platforms	Leadership and Management Skills	Sales and Marketing Skills	Business skills	Finance skills	Technical skills	Set Crafts Skills	Production skills	Creative talent	Skills in using software packages	Multi –skilling	Other	Don't know	Base
	%	%	%	%	%	%	%	%	%	%	%	%	%	n
Film Production	17	31	21	23	27	9	8	19	22	12	17	24	34	76
Film Distribution & Cinema Exhibition	38	49	39	19	34	24	6	9	7	11	21	24	26	25
Broadcast TV	33	42	31	25	16	25	7	18	30	30	31	11	41	48
Independent Production for TV	27	23	26	20	15	37	10	23	25	25	27	16	33	202
Broadcast Radio	30	34	23	8	4	13	2	18	28	18	25	8	40	75
Community and Other Radio	17	28	50	20	21	24	6	25	23	22	29	16	25	72
Animation	22	17	26	29	11	31	9	10	22	30	21	10	28	105
Online Content	26	25	29	19	11	32	4	9	17	26	25	14	35	395
Other Interactive Media	24	34	43	21	17	39	5	7	16	18	26	8	27	174
Computer Games	28	37	31	26	21	28	7	15	24	19	29	9	29	51
Corporate Production	21	24	30	23	13	40	6	17	20	22	26	15	26	92
Commercials and Other Content Creation	26	17	14	11	10	38	4	23	27	5	30	27	44	42
Post Production	19	24	25	21	12	30	11	13	17	29	18	18	25	57
Studios and Equipment Hire	12	27	26	19	18	28	10	7	13	25	21	12	41	99
Other Facilities	12	24	32	21	19	28	22	14	13	21	25	23	36	95

Archives and Libraries	21	21	16	19	13	10	6	10	13	27	29	13	40	38
Book Publishing	22	15	29	15	11	21	7	16	18	37	22	13	26	115
Publishing of Newspapers	17	19	34	7	8	20	4	9	16	34	19	7	44	124
Publishing of Journals and Periodicals	15	21	41	15	10	22	2	11	17	18	21	10	35	189
Other Publishing	24	16	39	24	18	21	0	8	15	36	20	13	29	51
Photographic Activity	10	19	37	21	18	24	13	9	22	41	27	15	34	397
Other Photo Imaging	9	18	31	14	19	15	9	8	15	30	26	13	41	100
Total	19	22	34	19	15	25	7	11	18	29	24	14	33	2,634

Base 2,634

Respondents in Wales were also asked if the demand for Welsh language skills would be difficult to meet over the next three to five years; just over a quarter (26%) of Welsh respondents anticipated it would be.

7 Education and Qualifications

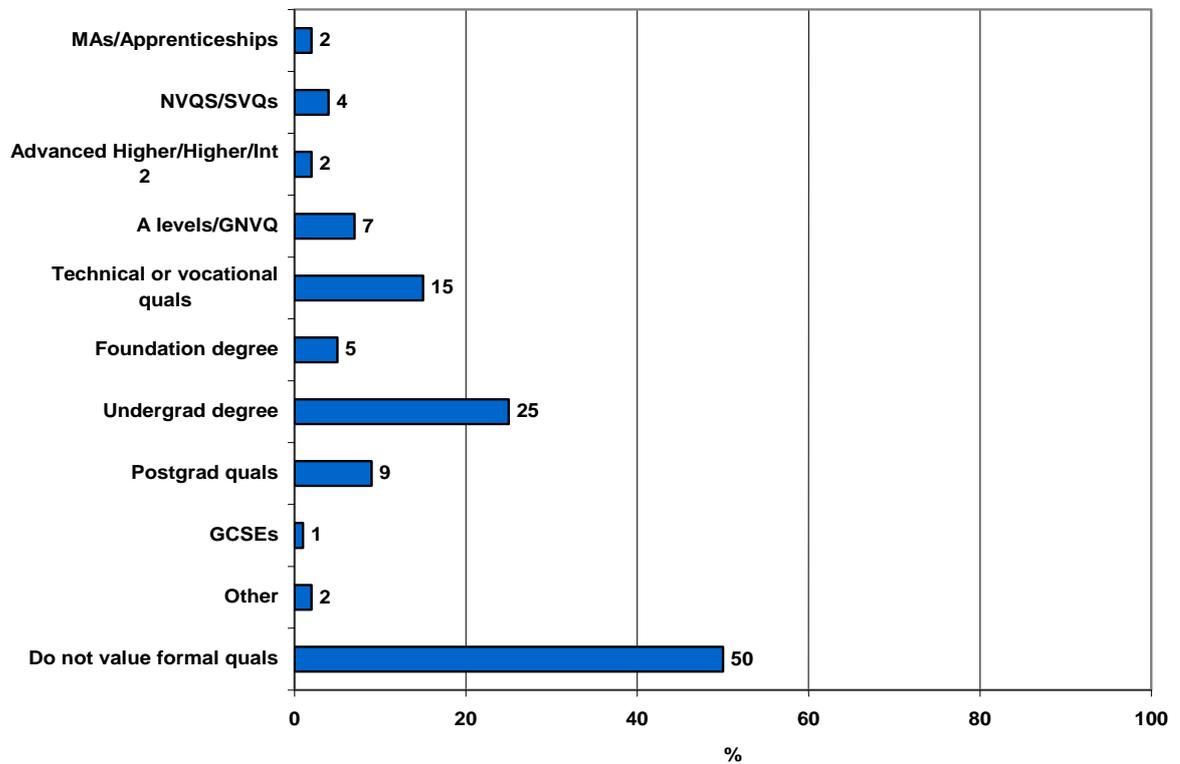
This section covers employers' views of education and qualifications and in particular their perceptions of the relative value of specific qualifications.

Figure 7.1 shows the proportion of employers who say they value each main type of qualification. Overall, perhaps the most striking finding is that half of employers say they do not value formal qualifications. In contrast to this finding is the high level of graduate employment that currently exists within the Creative Media workforce; with 57% of the workforce holding a qualification that is NVQ Level 4 equivalent or higher.¹⁷ The percentage of graduates is even higher in some sectors, such as Animation, Computer Games and Television (Skillset 2010 Creative Media Workforce Survey). The apparent lack of value employers place on qualifications might be attributable to a perception that qualifications do not necessarily make new recruits to the sector 'job ready'.

By some margin, the qualification valued by most employers is an undergraduate degree (25%). Technical or vocational qualifications are valued by 15% of employers, and postgraduate degrees by 9%.

¹⁷ Skillset Creative Media Workforce Survey 2010, LFS, ONS Jan – Dec 2010. Includes Advertising.

Figure 7.1 Proportions of Employers Valuing Each Type of Qualification



Base 2,634

The comparison by sector is reported in **Figure 7.2**, which shows a number of key variations between sectors.

The proportion of employers saying they value apprenticeships is highest in Film Production (14%), Corporate Production (8%), and Computer Games (6%). The sectors with highest proportions valuing S/NVQs are Film Distribution and Cinema Exhibition (10%), Broadcast Television, Studios and Equipment Hire and Newspaper Publishing (all 8%).

Figure 7.2 Proportions of Employers Valuing Each Type of Qualification by Sector

	MAs/Modern Apprenticeships	NVQs/SVQs	Advanced Higher/Higher/Int 2	A levels/GNVQ	Technical/vocational qualifications	Foundation degree	Undergraduate degree	Postgraduate degree	GCSEs	Other	Do not value formal qualifications	Don't know	Base
	%	%	%	%	%	%	%	%	%	%	%	%	<i>n</i>
Film Production	14	0	0	5	22	1	25	8	0	8	45	9	76
Film Distribution & Cinema Exhibition	2	4	0	10	23	0	19	2	0	8	51	5	25
Broadcast TV	5	8	4	8	28	9	48	28	0	8	27	8	48
Independent Production for TV	4	3	3	2	14	6	23	11	*	2	54	10	202
Broadcast Radio	1	1	1	3	16	3	25	13	0	1	50	13	75
Community and Other Radio	4	10	2	8	13	5	24	4	1	4	50	7	72
Animation	3	1	4	4	18	14	37	14	0	2	48	2	105
Online Content	3	3	1	5	16	8	26	13	1	1	46	8	395
Other Interactive Media	1	1	1	3	12	3	31	12	0	3	48	5	174
Computer Games	6	2	2	3	8	5	32	17	2	4	46	2	51
Corporate Production	8	5	1	4	15	3	22	7	0	1	56	4	92
Commercials and Other Content Creation	*	0	0	0	8	0	27	*	0	2	41	23	42
Post Production	5	5	2	8	16	1	22	5	0	0	52	10	57
Studios and Equipment Hire	3	8	0	6	16	4	21	4	1	3	57	4	99
Other Facilities	4	7	4	10	22	10	26	9	3	7	42	1	95
Archives and Libraries	0	0	0	1	10	2	27	15	0	6	43	9	38
Book Publishing	1	6	*	6	11	3	32	13	0	1	49	9	115
Publishing of Newspapers	1	8	1	9	30	1	22	18	6	1	31	9	124
Publishing of Journals and Periodicals	2	6	*	7	13	2	29	11	2	2	43	9	189
Other Publishing	1	3	3	14	19	5	28	6	3	3	43	5	51

Photographic Activity	2	4	2	5	14	2	16	3	*	2	58	10	397
Other Photo Imaging	2	3	2	6	10	3	17	6	3	0	63	7	100
Other	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	12
Total	2	4	2	7	15	5	25	9	1	2	50	7	2,634

Base 2,634

Table 7.3 reports data from the same question but comparing by company size. Crucially, the proportion of employers saying they do not value qualifications correlates very strongly with company size. 28% of medium-large employers say they do not value formal qualifications compared to 41% of small businesses and 52% of micro-businesses. Higher proportions of medium-large employers value every type of qualification, than do small or micro-businesses.

This is especially important bearing in mind that the data have not been weighted by company size, as the high proportion of smaller employers in the response results in an apparently low percentage of employers across the board saying that they value qualifications.

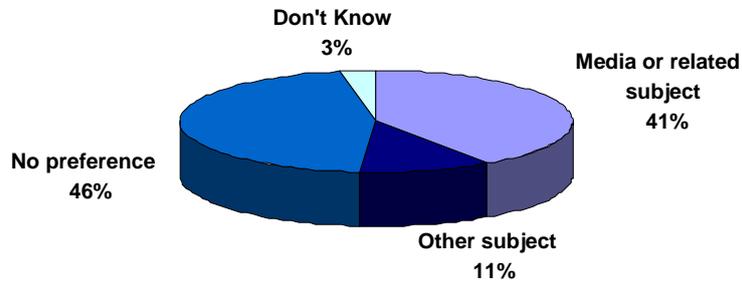
Figure 7.3 Proportions of Employers Valuing Each Type of Qualification by Company Size

	MAs/Modern Apprenticeships	NVQs/SVQs	Advanced Higher/Higher/Int 2	A levels/GNVQ	Technical/vocational qualifications	Foundation degree	Undergraduate degree	Postgraduate degree	GCSEs	Other	Do not value formal qualifications	Don't know	Base
	%	%	%	%	%	%	%	%	%	%	%	%	<i>n</i>
Medium-large employers (>50 people)	9	7	3	11	26	8	39	20	*	5	28	12	205
Small employers (11-50 people)	3	4	1	7	19	7	32	12	1	3	41	7	496
Micro-businesses (1-10 people)	2	4	2	6	14	4	23	7	1	2	53	7	1,933
Total	2	4	2	7	15	5	25	9	1	2	50	7	2,634

Base 2,634

Employers who said they valued either undergraduate or postgraduate qualifications were asked whether they prefer people to have qualifications in media or a related subject or in another subject. As shown in **Figure 7.4** the highest proportion (46%) say they have no preference, 41% that they prefer a media or related qualification, and 11% that they prefer a qualification in another subject.

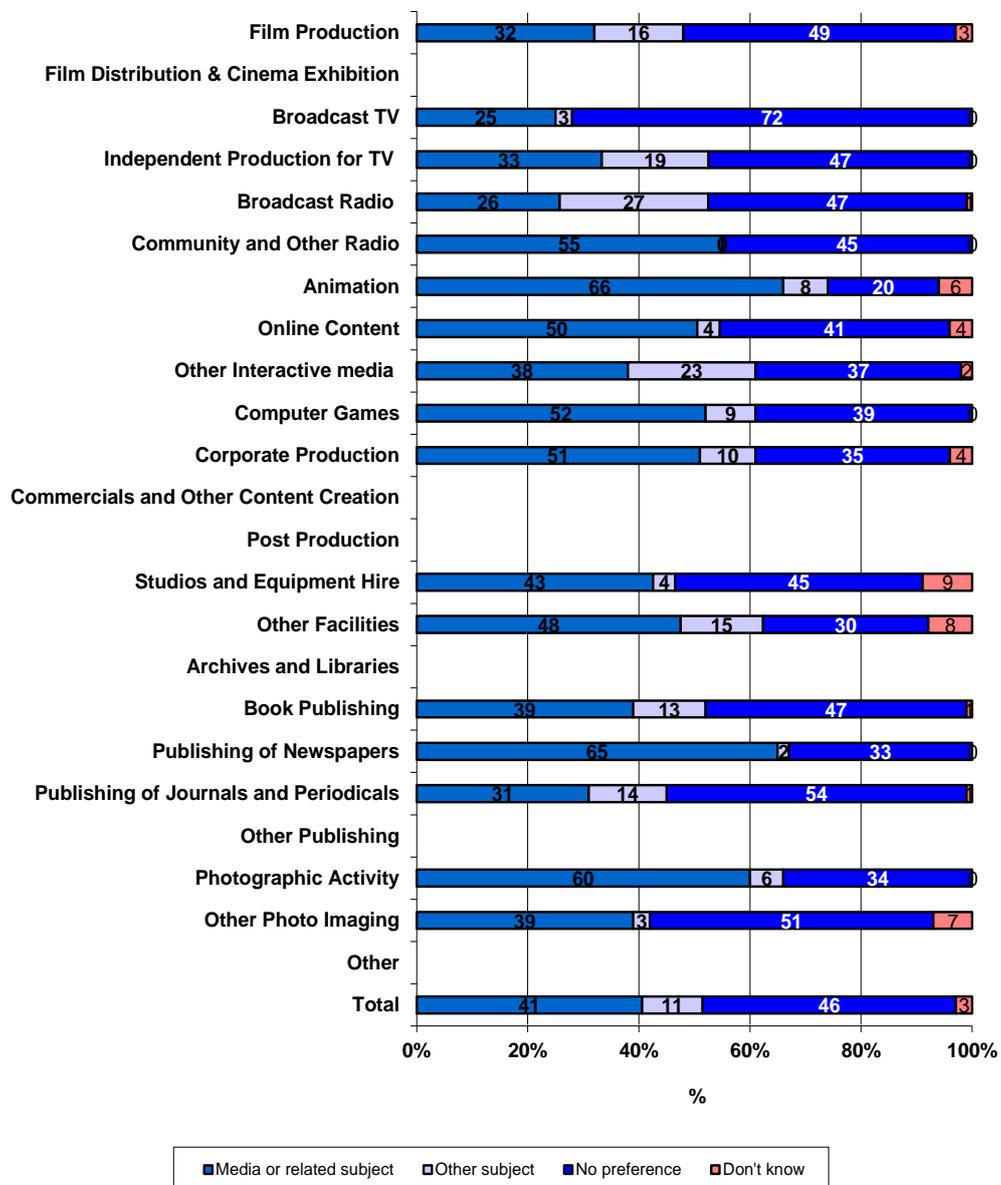
Figure 7.4 Proportion of Employers Preferring Individuals to have Qualifications in a Media or Related Subject or in Other Subjects



Base 800

Figure 7.5 shows preference for degree subject by sector. Data are not available for every sector due to response numbers. Sectors in which most employers prefer media or related qualifications include Animation (66%), Publishing of Newspapers (65%), and Photographic Activity (60%). The proportion of those preferring other subjects is highest in Broadcast Radio (26%), Other Interactive Media (23%), and Independent Production for Television (19%).

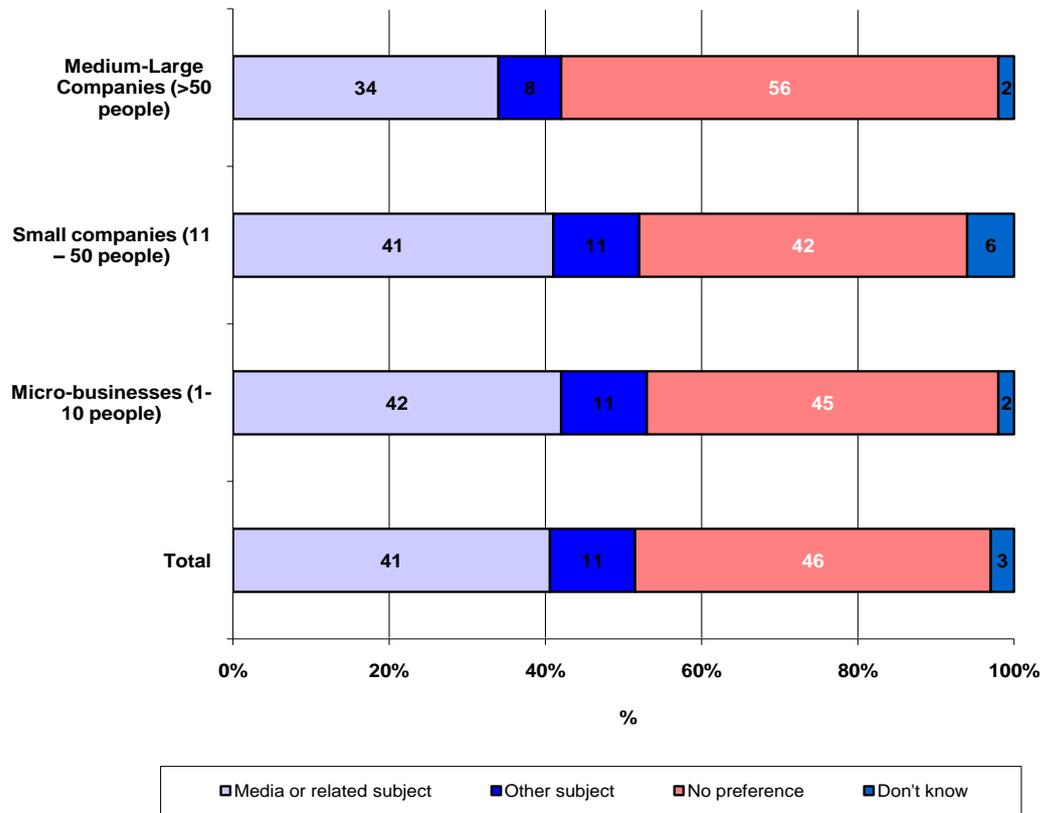
Figure 7.5 Proportion of Employers Preferring Individuals to have Qualifications in a Media or Related Subject or in Other Subjects by Sector



Base 800

Figure 7.6 shows that higher proportions of small employers and micro businesses indicate a preference for media qualifications, than medium-large employers. In part, this may reflect the preferences of employers by sector as shown in **Figure 7.5**, as many sectors with a high level of preference for media qualifications comprise mainly smaller employers, in particular Photographic Activity.

Figure 7.6 Proportion of Employers Preferring Individuals to have Qualifications in a Media or Related Subject or in Other Subjects by Company Size



Base 800

8 Learning and Development

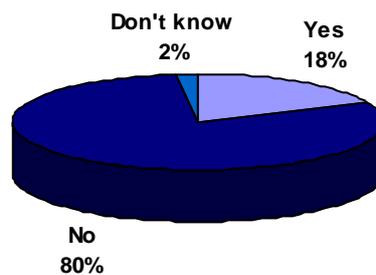
This section covers issues relating to learning and development, including:

- Learning and development plans and budgets
- Levels and modes of learning and development delivery
- Barriers and obstacles to delivery of learning and development
- Apprenticeships, internships and work experience placements

Learning and Development Plans and Budgets

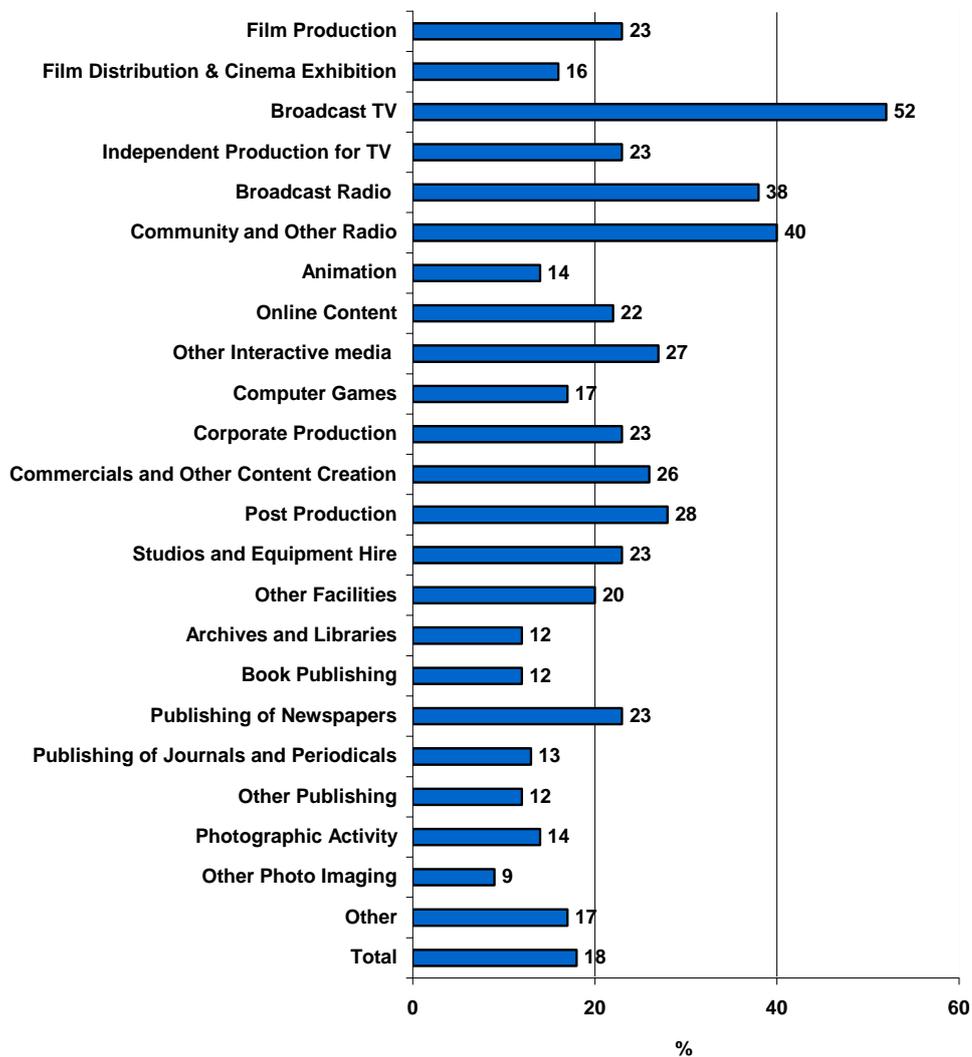
This section of the survey began by asking employers whether they have a plan that specifies the level and type of learning and development that they will invest in over the coming year. As shown in **Figure 8.1**, just under one in five (18%) of employers said that they do.

Figure 8.1 Proportion of Employers with Learning and Development Plans



Sectors differ considerably in their usage of learning and development plans, as can be seen from scrutiny of **Figure 8.2**. The sector with the highest levels is Broadcast Television, in which over half (52%) of employers say they have a plan, followed by community and other Radio (40%), and Broadcast Radio (38%). The sectors in which learning and development plans are least common are Archives and Libraries (12%), Animation (14%), and all sectors of Publishing and Photo Imaging except Book Publishing.

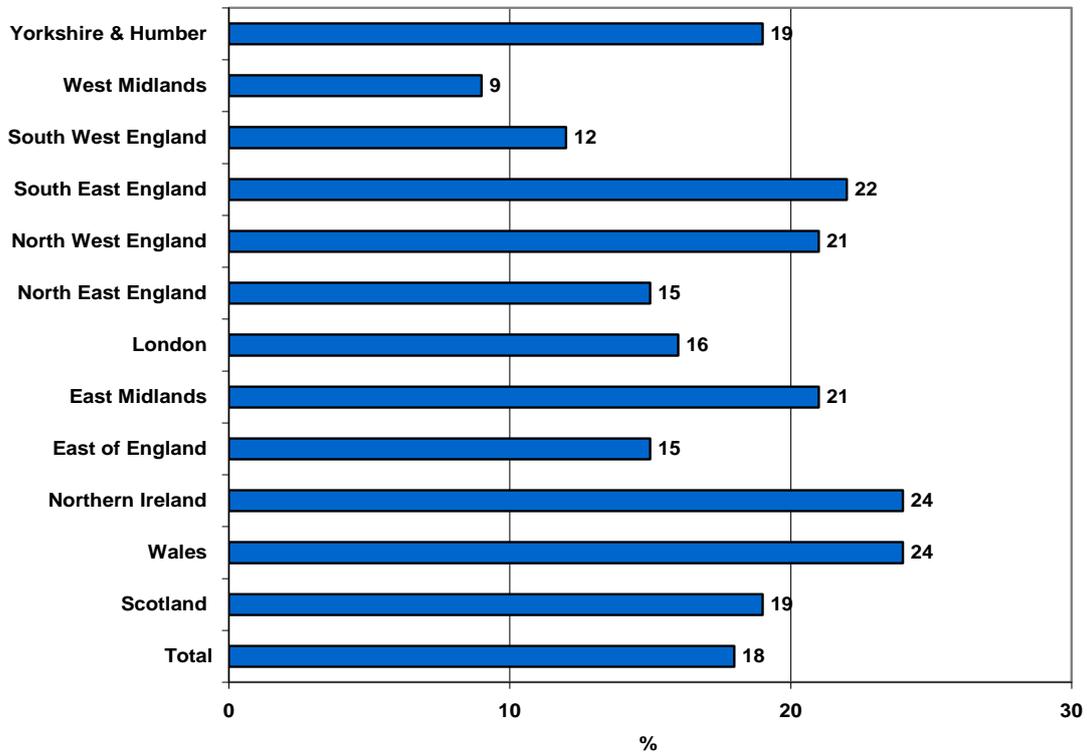
Figure 8.2 Proportion of Employers with Learning and Development Plans by Sector



Base 2,634

There is some geographical variation in levels of learning and development plans, as seen in **Figure 8.3**. They are most common in Wales and Northern Ireland (both 24%), South East England (22%) and North West England (21%). Substantially fewer than average employers have learning and development plans in the West Midlands (9%), and South West England (12%). To some extent, this may reflect the relative presence of different sectors across the different nations and regions of the UK, and the relative prevalence of learning and development plans among those, as shown in **Figure 8.2**.

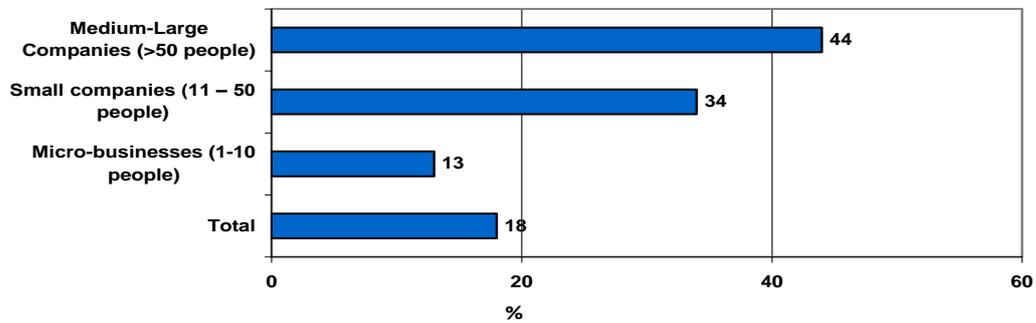
Figure 8.3 Proportion of Employers with Learning and Development Plans by Nation/Region



Base 2,634

As would perhaps be expected, the prevalence of learning and development plans correlates strongly with company size, as shown in **Figure 8.4**. While 44% of medium-large employers say they have plans, this goes down to 34% of small employers, and just 13% of micro-businesses.

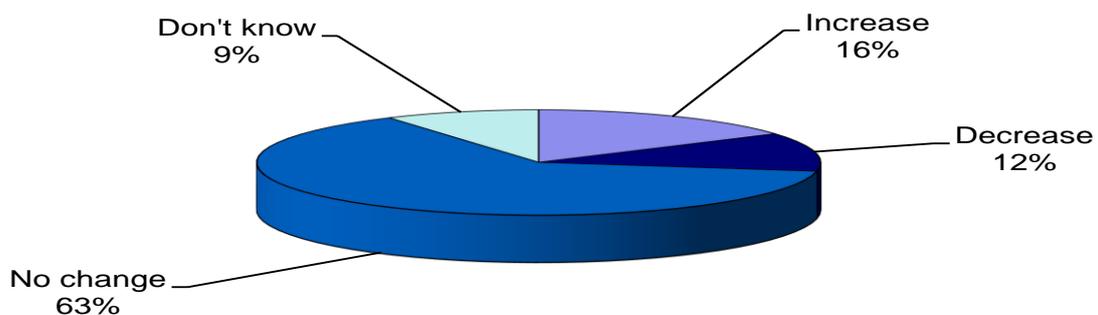
Figure 8.4 Proportion of Employers with Learning and Development Plans by Company Size



Base 2,634

Employers were next asked whether their budget for learning and development for the current year has increased or decreased compared to the previous financial year. The majority (63%) say there has been no change, 16% that it has increased and 12% that it has decreased.

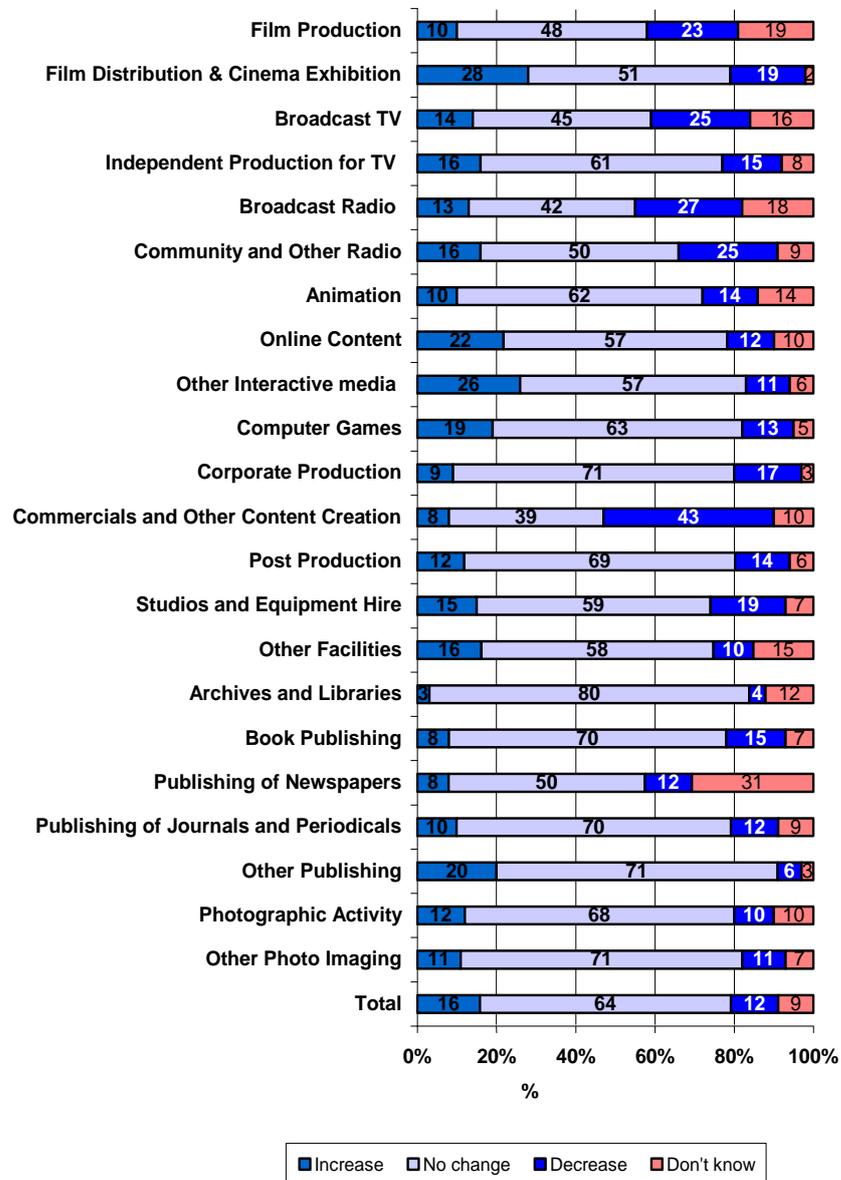
Figure 8.5 Proportion of Employers Reporting Increase, Decrease or No Change in Learning and Development Budget Compared to Previous Financial Year



Base 2,634

Figure 8.6 reveals some significant differences between sectors in changes to learning and development budgets. Those sectors with the greatest proportion reporting an increase include Film distribution and exhibition (28%), all interactive and games sectors (ranging from 19% to 26%), and Other Publishing (20%). Those with the highest proportion reporting a decrease include Commercials and other content creation (43%), Broadcast Radio (27%), Broadcast Television (25%), and Film Production (23%).

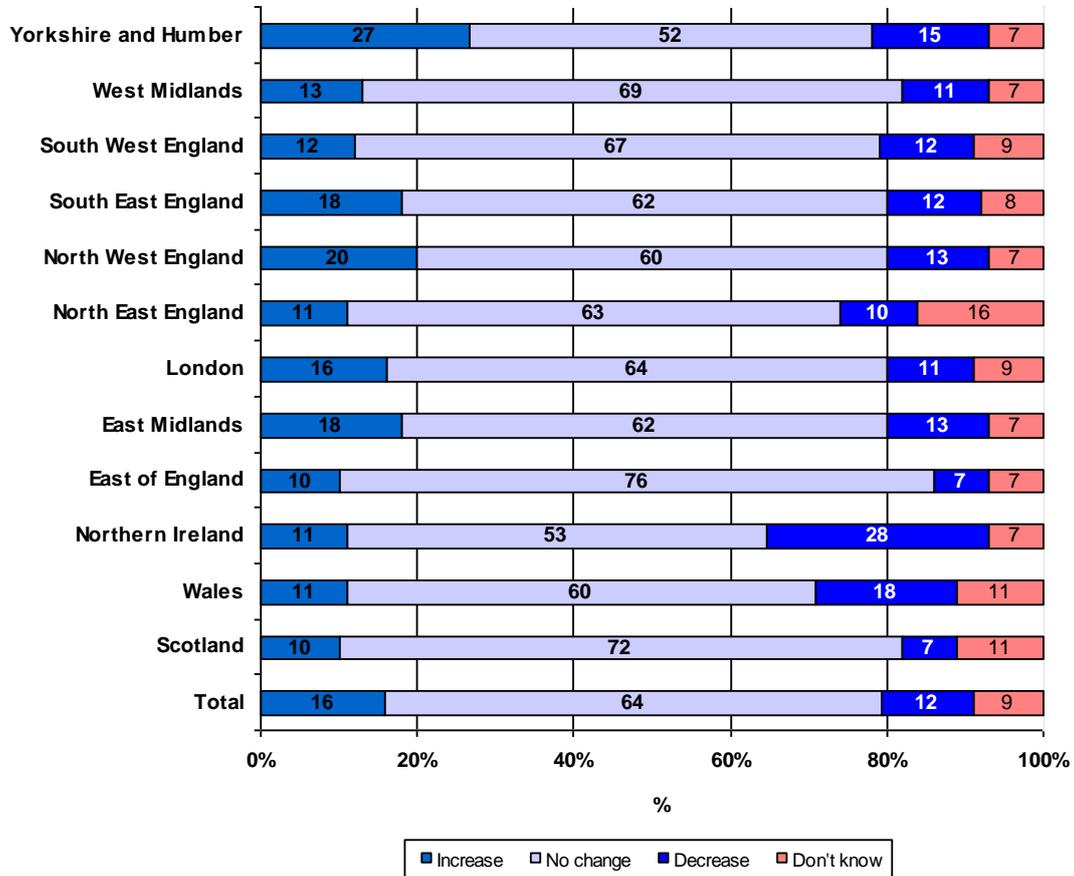
Figure 8.6 Proportion of Employers Reporting Increase, Decrease or No Change in Learning and Development Budget Compared to Previous Financial Year, by Sector



Base 2,634

Figure 8.7 reports recent trends in learning and development budgets by nation and region. There are few notable trends except that a higher than average percentage of employers in Yorkshire and the Humber report an increase (27%) and a higher than average percentage in Northern Ireland a decrease (28%).

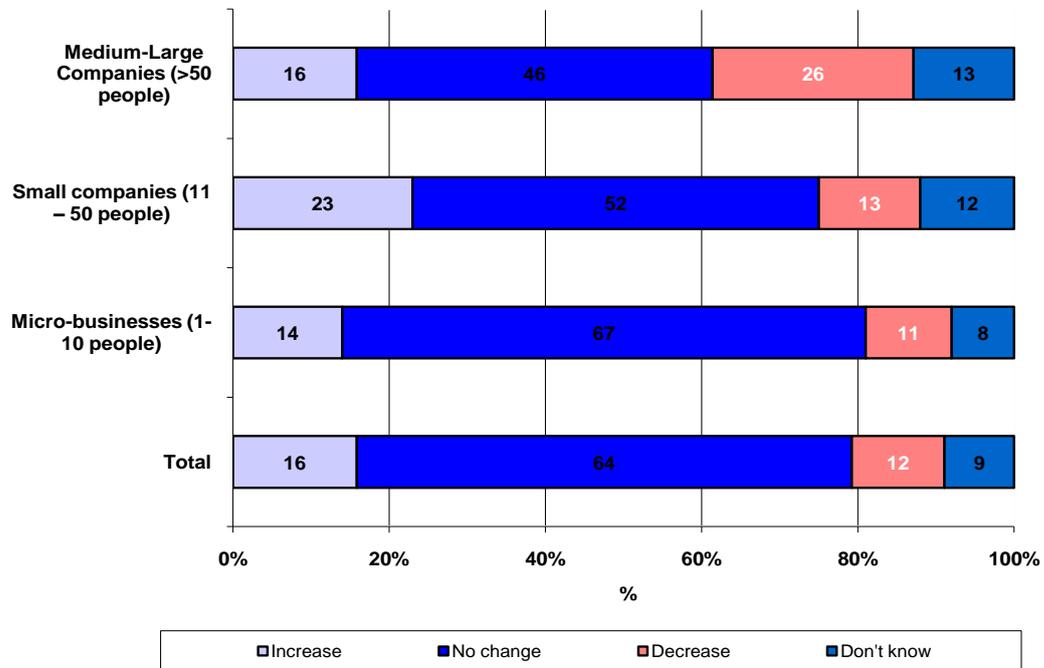
Figure 8.7 Proportion of Employers Reporting Increase, Decrease or No Change in Learning and Development Budget Compared to Previous Financial Year, by Nation/Region



Base 2,634

There is also little variation by company size, as can be seen from **Figure 8.8**, although a higher than average proportion of small employers report an increase (23%), and a higher than average of proportion of medium-large employers a decrease (26%).

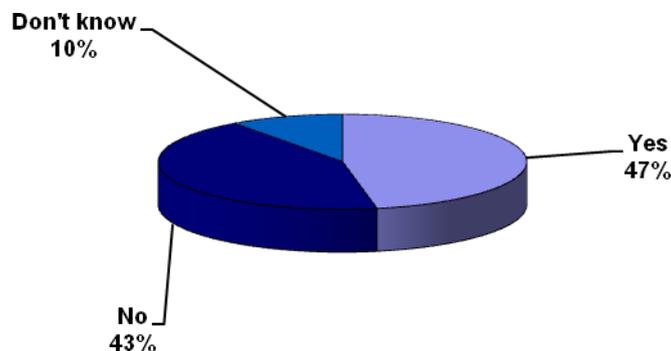
Figure 8.8 Proportion of Employers Reporting Increase, Decrease or No Change in Learning and Development Budget Compared to Previous Financial Year, by Company Size



Base 2,634

Respondents were asked whether any changes they report in their learning and development budgets are in line with changes in company turnover. Nearly half say that they are (47%), as shown in **Figure 8.9**.

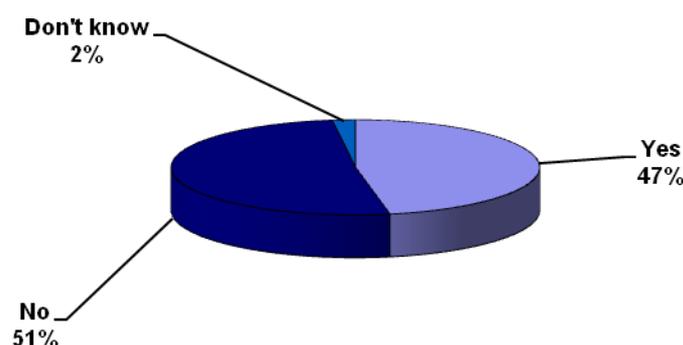
Figure 8.9 Proportion of Employers whose Changes to Learning and Development Budget were in Line with Changes in Turnover



Levels and Modes of Training Delivery

The survey then asked respondents whether they have funded or arranged any learning or development over the past twelve months. Nearly half (47%) said that they have, as shown in **Figure 8.10**.

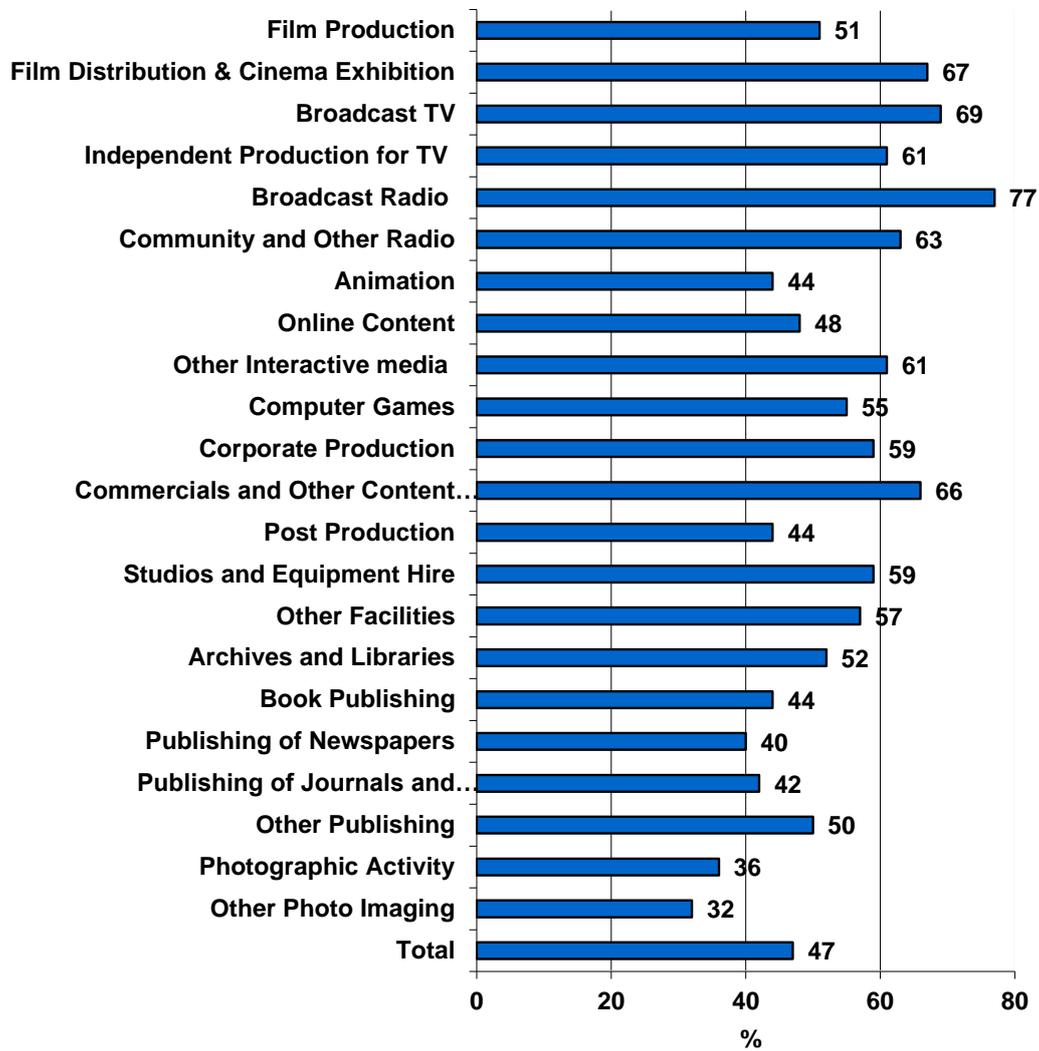
Figure 8.10 Proportion of Employers Funding or Arranging Learning or Development over the Past Twelve Months



The percentage of employers providing learning and development varies greatly between sectors, as can be seen from inspection of **Figure 8.11**. The highest proportions of employers having funded or arranged learning and development are to be found in Broadcast Radio (77%) and Broadcast Television (69%). The lowest are found in both Photo Imaging sectors (32% and 36%), and all Publishing sectors except Other Publishing (ranging from 40% to 44%).

It is highly likely that these variations by sector are an effect of company size. As would be expected, and as can be seen in **Figure 8.13**, larger employers are more likely to fund or arrange learning and development (apart from anything they have more people to train), and the sectors where learning and development is most prevalent are those containing more larger employers (for example, Broadcast Radio and Broadcast Television).

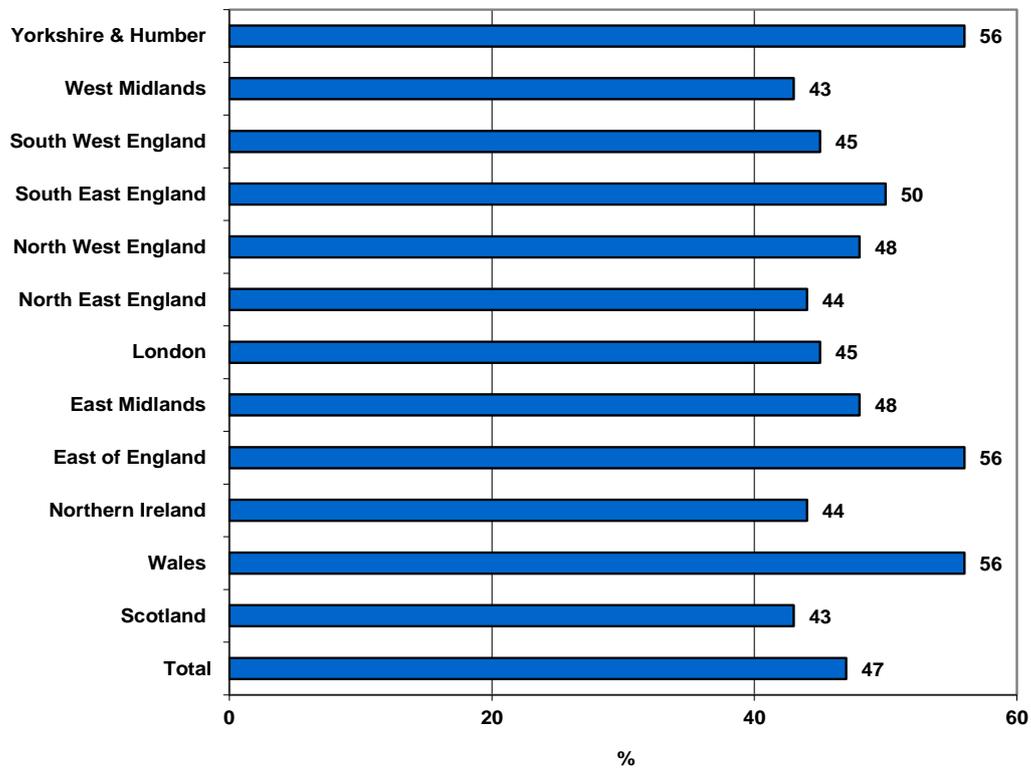
Figure 8.11 Proportion of Employers Funding or Arranging Learning or Development over the Past Twelve Months, by Sector



Base 800

There are few discernible variations across the UK in levels of provision of learning and development, though above average percentages of employers report funding or arranging it in the East of England, Yorkshire and the Humber and Wales (all 56%).

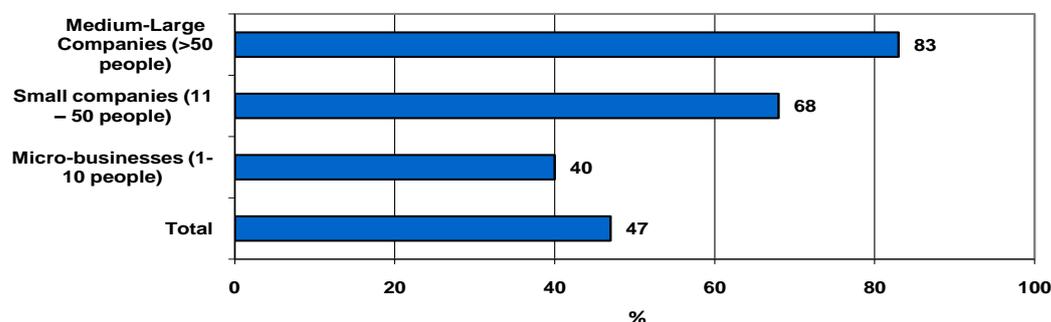
Figure 8.12 Proportion of Employers Funding or Arranging Learning or Development over the Past Twelve Months, by Nation/Region



Base 800

As noted above, prevalence of learning and development correlates strongly with company size. Specifically, as can be seen from **Figure 8.13**, 83% of medium-large employers have funded or arranged some in the past year, compared with 68% of small employers and 40% of micro-businesses.

Figure 8.13 Proportion of Employers Funding or Arranging Learning or Development over the Past Twelve Months, by Company Size



Base 800

Employers who had funded or arranged learning and development in the past twelve months were asked for which type of skill it was provided. **Figure 8.14** lists the top ten skill areas cited. To a large extent, these priorities reflect the skills gaps discussed in **Section 5** – for example, the most common area in which training has been delivered is skills in using software packages, which was third in the list of skills gaps for employees (see **Figure 5.6**), while technical skills is the second most common area of training delivery and second most common area cited as a skills gap. Similarly, sales and marketing is the third most common area of training delivery and the top area cited as a skills gap and leadership and management is the fourth most common area of delivery as well as the fourth most prevalent skills gap.

Appendix C lists the top ten skill areas in which learning and development has been offered within each sector.

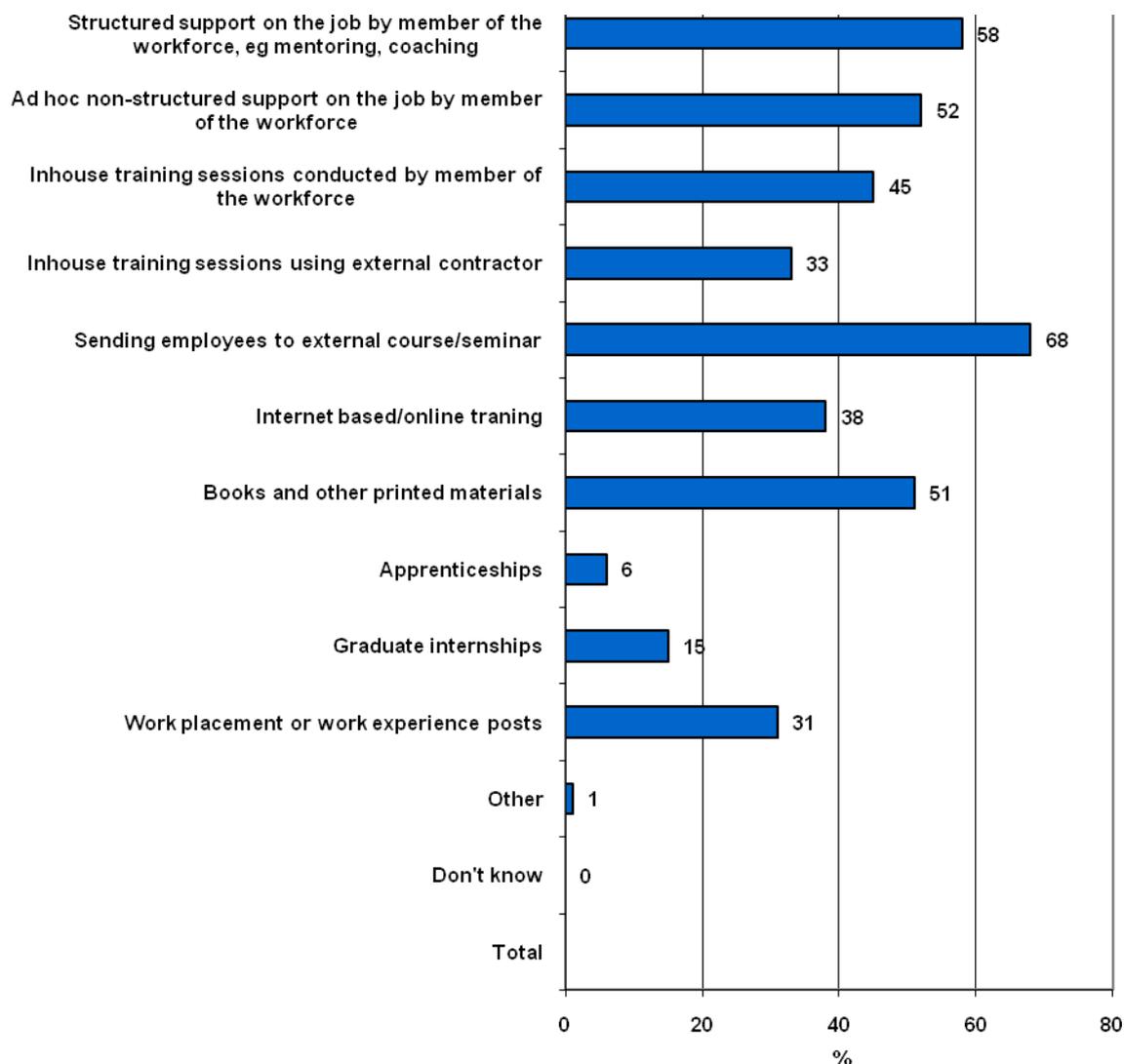
Employers who had funded or arranged learning and development for ‘skills to develop content for multiple platforms’, ‘business skills’, ‘technical skills’ and ‘production skills’ were asked to specify in which area this was provided. Within the broad category of ‘technical skills’, employers were most likely to specifically mention computer programming, computer/software usage and editing. A full breakdown of the areas of learning and development as specified by employers is available at **Appendix D**.

Figure 8.14 Top Ten Skill Areas in Which Learning and Development have been Offered in Past Twelve Months

Skill Area	%
Skills in using software packages	47
Technical skills	42
Sales and Marketing skills	36
Leadership and Management skills	30
Business skills	21
Skills to develop content for multiple platforms	17
Finance skills	16
Multi-skilling	15
Production skills	15
Creative talent	14
<i>Base</i>	<i>1,300</i>

Employers who had funded or arranged learning and development were asked how it had been delivered. As shown in **Figure 8.15**, the most common mode of delivery is sending employees to external courses or seminars, reported by 68% of employers, followed by structured support on the job, such as coaching or mentoring (58%), and ad hoc support on the job (52%). The proportion of employers involved in schemes ranges from 31% operating work experience placements to 15% running graduate internships, and 6% apprenticeships.

Figure 8.15 Proportions of Employers Employing Each Mode of Learning and Development Delivery



Base 1,300

There are some important differences between sectors worth noting, in the mode of delivery of learning and development, as shown in **Figure 8.16**. First of all, the sending of employees on external courses or seminars is higher than average in Broadcast TV (87%) and Film Production (81%), and most sectors of Publishing. It is lower than average in Archives and Libraries (54%), Corporate Production (56%), Broadcast Radio (58%) and Post Production (60%). In Radio, on the job support and in-house training are more commonly used than external provision, as is the case to a lesser extent in Post Production and Corporate Production.

Figure 8.16 Proportions of Employers Employing Each Mode of Learning and Development Delivery, by Sector

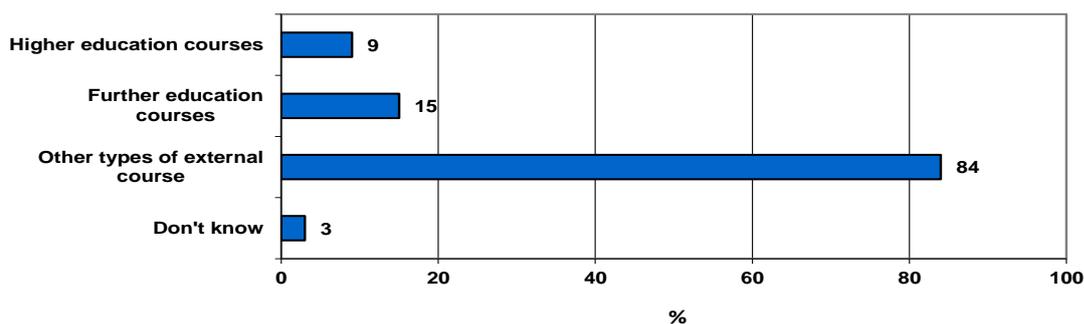
	Structured support on the job by member of workforce	Ad hoc non-structured support on the job by member of workforce	In-house training sessions conducted by member of workforce	In-house training sessions using an external contractor	Sending employees out to an external course or seminar	Internet based/online learning	Books and other printed materials	Apprenticeships	Graduate internships	Work placement or work experience posts	Other	Don't know	Base
	%	%	%	%	%	%	%	%	%	%	%	%	<i>n</i>
Film Production	73	59	24	6	81	25	30	8	38	57	0	0	39
Film Distribution & Cinema Exhibition	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	13
Broadcast TV	63	63	54	69	87	60	43	18	39	58	0	3	36
Independent Production for TV	64	59	49	41	77	29	39	11	30	55	1	0	118
Broadcast Radio	81	70	80	53	58	34	54	7	34	66	2	2	53
Community and Other Radio	79	74	85	34	69	33	45	13	24	82	6	0	41
Animation	51	66	46	30	60	38	58	7	25	45	0	0	45
Online Content	57	50	37	31	67	54	62	5	19	24	2	0	170
Other Interactive Media	63	57	49	39	63	50	66	5	15	27	2	0	96
Computer Games	54	54	45	59	63	36	68	2	17	41	0	0	29
Corporate Production	64	67	49	22	56	40	59	9	20	43	0	0	52
Commercials and Other Content Creation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	17
Post Production	80	80	70	48	60	32	51	13	21	43	0	0	23
Studios and Equipment Hire	60	59	58	46	68	29	50	11	14	41	4	0	58
Other Facilities	54	39	50	42	72	29	49	10	16	33	2	2	49
Archives and Libraries	51	55	39	8	54	11	58	8	15	47	0	2	22
Book Publishing	57	50	34	31	76	32	68	11	16	32	0	0	63
Publishing of Newspapers	70	46	75	34	74	29	21	9	8	35	1	*	77

Publishing of Journals and Periodicals	58	61	45	40	67	36	46	3	18	34	3	0	89
Other Publishing	56	54	36	18	68	25	33	2	7	12	0	0	26
Photographic Activity	50	37	46	20	60	34	52	6	5	19	1	0	142
Other Photo Imaging	53	53	44	36	71	35	45	3	11	42	0	0	36
Other	n/a	n/a	n/a	n/a	n/a	n/a	6						
Total	58	52	45	33	68	38	51	6	15	31	1	*	1,300

Base 1,300

Employers who had sent people on external courses or seminars were asked what nature these took. The responses are shown in **Figure 8.17**. The various responses do not add up to 100% as respondents were able to indicate more than one option. Overall, 15% say courses are in higher education, 9% further education, and 84% some other type of external course.

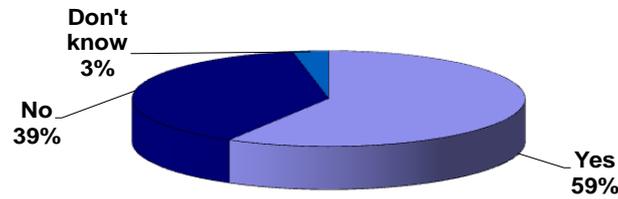
Figure 8.17 Proportions of Employers Sending People on Each Type of External Course



Base 860

Employers who said they have funded or arranged some learning or development were asked whether this is open to people on short term contracts. Over half (59%) say that it is.

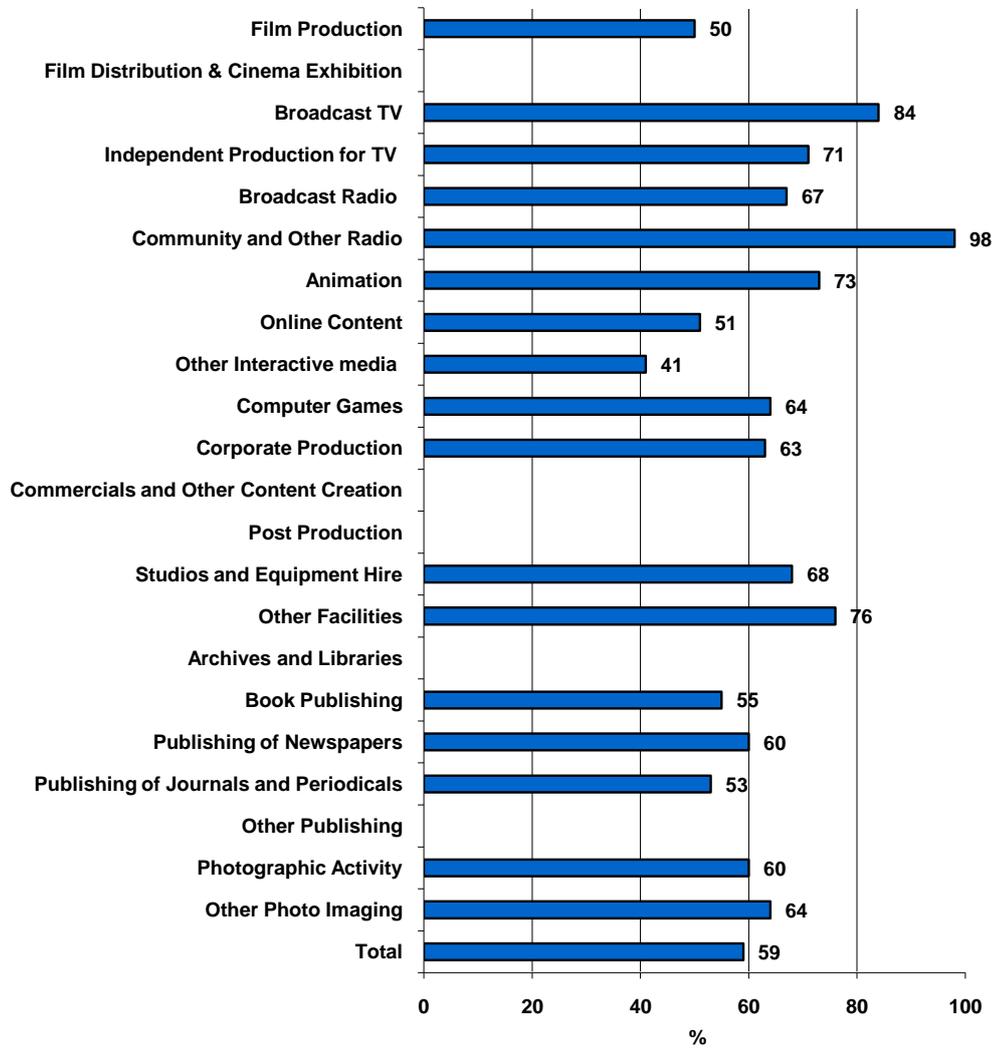
Figure 8.18 Proportions of Employers Offering Learning and Development whose Learning and Development is Open to People on Short Term Contracts



Base 845

Sectors vary greatly in the extent to which their learning and development is open to people on short term contracts, as shown in **Figure 8.19**. Figures are not available for every sector due to response numbers. Almost all (98%) of Community Radio employers make their learning and development available to people on short term contracts, as do the vast majority of those in Broadcast Radio, and the sectors within Television and Post Production. Employers in the sectors within Interactive Media are least likely to open their learning and development opportunities to people on short term contracts. It is possible that these figures are affected by the need for freelancers to pay for their own training tax purposes and the inclusion of informal methods of learning and development in the question.

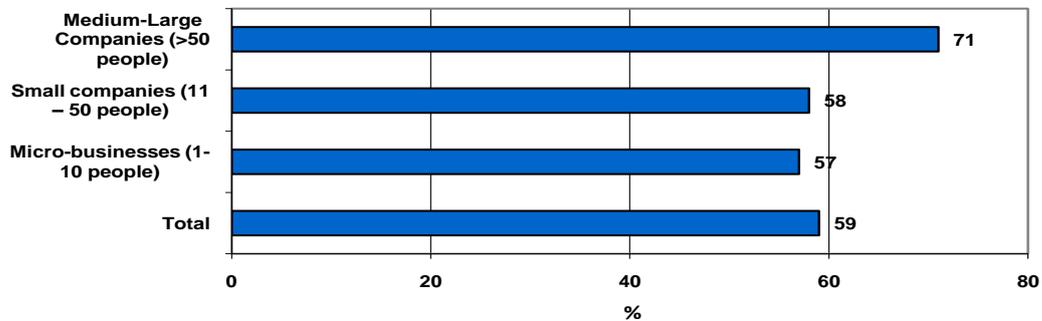
Figure 8.19 Proportions of Employers Offering Learning and Development whose Learning and Development is Open to People on Short Term Contracts, by Sector



Base 845

As can be seen in **Figure 8.20**, medium-large employers are more likely than average to offer their learning and development to people on short term contracts – 71% compared with the average of 59%.

Figure 8.20 Proportions of Employers Offering Learning and Development whose Learning and Development is Open to People on Short Term Contracts, by Company Size

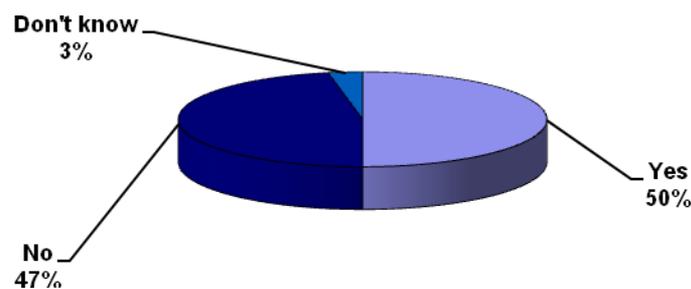


Base 845

Barriers and Obstacles to Delivery of Learning and Development

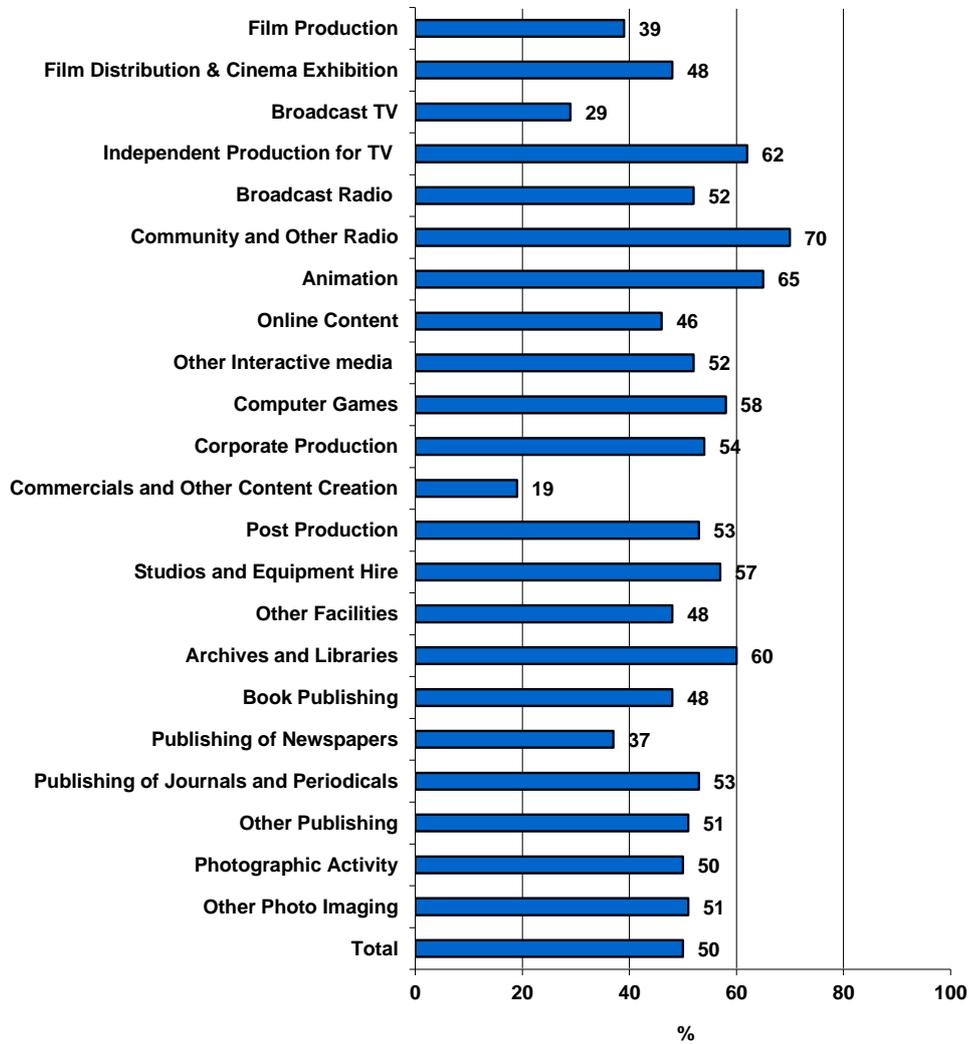
Respondents were next asked whether there were any particular reasons that they do not provide more learning and development for their workers. Exactly half say that there are.

Figure 8.21 Proportions of Employers with Particular Reasons for Not Providing More Learning and Development



This picture varies greatly by sector, as can be seen from scrutiny of **Figure 8.22**, though it is hard to discern an overall pattern. The highest percentages of employers saying there are specific reasons are in community and other Radio (70%), Animation (65%), and Independent Production for Television (61%). The lowest are in Commercials and other content creation (19%), and Broadcast Television (29%).

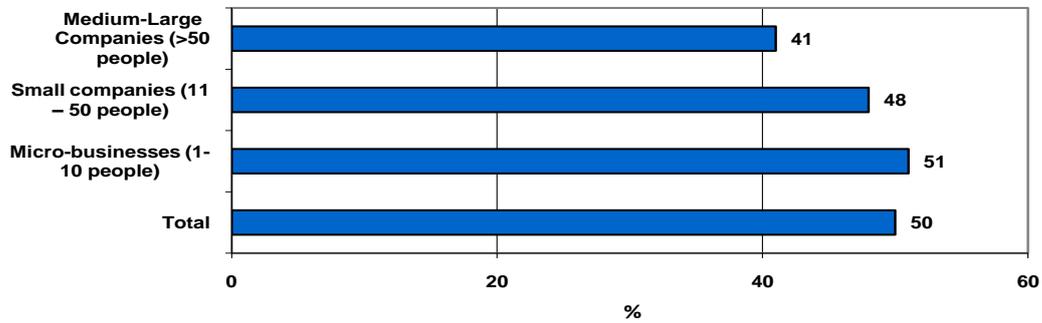
Figure 8.22 Proportions of Employers with Particular Reasons for Not Providing More Learning and Development, by Sector



Base 2,634

Small employers and micro-businesses are more likely to indicate specific reasons for not providing more learning development than medium-large employers, as revealed in **Figure 8.23**.

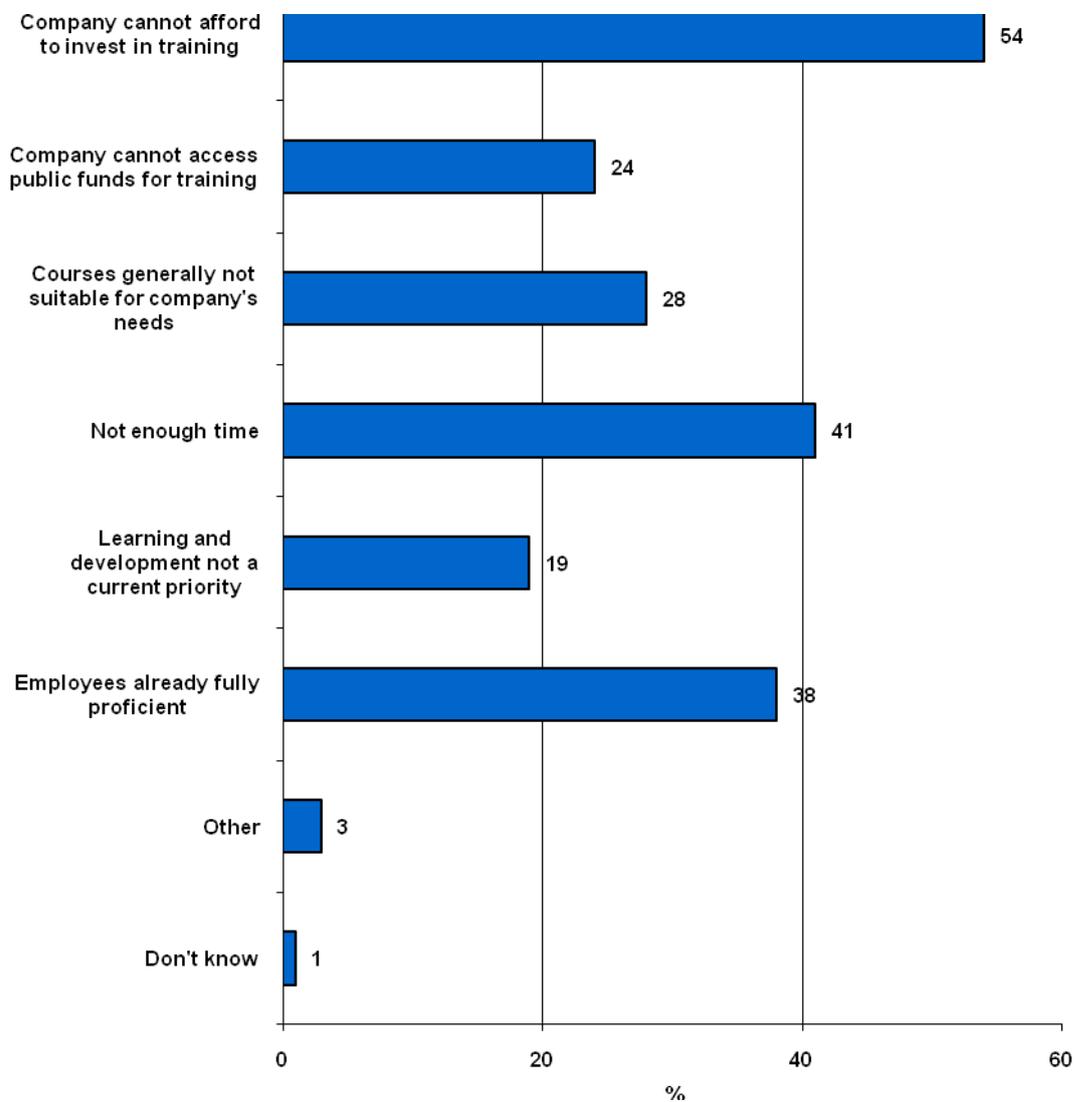
Figure 8.23 Proportions of Employers with Particular Reasons for Not Providing More Learning and Development, by Company Size



Base 2,634

Those employers who said there were particular reasons for not providing more learning and development were asked whether these reasons are a result of any specific obstacles. The percentage citing each of a list of obstacles is shown in **Figure 8.24**. Over half of employers (54%) say they cannot afford to invest in training, 41% that there is not enough time, and 38% that employees are already proficient. Around a fifth (19%) say that learning and development is not a priority for their business at the time of the survey.

Figure 8.24 Proportion of Employers Citing Particular Obstacles to Providing More Learning and Development



Base 1,269

Figure 8.25 shows the percentages of employers citing each obstacle to providing more learning and development by sector. Data are not available for every sector due to low sample numbers. The key points to emerge are as follows:

- Higher than average proportions of employers in Post Production, Newspaper Publishing, Other Publishing, and community and other Radio cite not being able to afford to invest in training as an issue.
- Unsuitability of courses is indicated as an issue by more employers in Corporate Production, Computer Games, and Archives and Libraries than elsewhere.

- Inaccessibility of funds for training is a particular issue for both Radio sectors.
- No more than a quarter of employers in any sector say that learning and development is not currently a priority.

Figure 8.25 Proportion of Employers Citing Particular Obstacles to Providing More Learning and Development, by Sector

	Company cannot afford to invest in training	Company cannot access public funds for training	Courses are generally not suitable for company's needs	Not enough time	Learning and development not a current priority	Employees already proficient	Other	Don't know	Base
	%	%	%	%	%	%	%	%	n
Film Production	60	27	19	32	22	53	6	0	34
Film Distribution & Cinema Exhibition	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	9
Broadcast TV	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	13
Independent Production for TV	44	21	31	45	18	40	1	3	119
Broadcast Radio	55	36	20	31	13	25	11	0	39
Community and Other Radio	67	34	23	44	4	19	17	8	47
Animation	42	25	33	48	21	43	2	0	69
Online Content	51	18	28	46	14	40	2	1	176
Other Interactive Media	58	29	26	45	11	21	2	0	84
Computer Games	39	8	37	50	20	40	5	0	29
Corporate Production	56	32	38	44	17	34	3	0	51
Commercials and Other Content Creation	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	13

Post Production	70	19	25	38	23	40	0	4	30
Studios and Equipment Hire	61	22	24	41	21	41	0	2	55
Other Facilities	55	13	23	39	19	27	7	2	41
Archives and Libraries	41	9	35	51	16	40	0	0	23
Book Publishing	39	20	28	36	18	46	1	0	51
Publishing of Newspapers	67	21	21	42	19	38	1	0	42
Publishing of Journals and Periodicals	49	25	27	38	24	57	*	0	83
Other Publishing	67	32	16	41	23	27	5	0	24
Photographic Activity	49	25	29	37	19	40	2	1	179
Other Photo Imaging	57	26	44	41	21	41	4	0	50
Other	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	8
Total	54	24	28	41	19	38	3	1	1,269

Base 1,269

Figure 8.26 shows the prevalence of obstacles to providing learning and development across the geographical areas of the UK. The main points of note are:

- Accessibility of public funds for training is cited by a higher than average percentage of employers in Yorkshire and the Humber, the West Midlands, London and Northern Ireland.
- Lack of suitability of courses is a particular issue in Yorkshire and the Humber, the West Midlands, South West England and Northern Ireland.

Figure 8.26 Proportion of Employers Citing Particular Obstacles to Providing More Learning and Development, by Nation/Region

	Company can not afford to invest in training	Company cannot access public funds for training	Courses are generally not suitable for company's needs	Not enough time	Learning and development not a current priority	Employees already proficient	Other	Don't know	Base
	%	%	%	%	%	%	%	%	n
Yorkshire and Humber	61	32	38	50	18	43	0	3	46
West Midlands	61	30	35	27	14	37	1	0	77
South West England	54	23	46	35	14	42	1	1	115
South East England	51	27	21	40	18	31	6	*	212
North West England	59	16	26	40	17	42	4	0	100
North East England	46	17	29	49	17	31	7	2	58
London	58	29	27	39	23	37	2	1	343
East Midlands	48	16	22	33	19	48	3	0	67
East of England	43	22	11	64	10	45	1	2	41
Northern Ireland	68	33	48	68	27	32	0	0	43
Wales	76	18	24	63	14	45	2	0	57
Scotland	36	10	21	37	23	42	2	*	110
Total	54	24	28	41	19	38	3	1	1,269

Base 1,269

Comparing by company size, **Figure 8.27** shows that:

- A higher proportion of micro-businesses than small businesses or medium-large employers say accessibility of public funds for training is an issue.

- A lower proportion of medium-large businesses than small employers or micro-businesses say that employees are already proficient.

Figure 8.27 Proportion of Employers Citing Particular Obstacles to Providing More Learning and Development, by Company Size

	Company can not afford to invest in training	Company cannot access public funds for training	Courses are generally not suitable for company's needs	Not enough time	Learning and development not a current priority	Employees already proficient	Other	Don't know	Base
	%	%	%	%	%	%		%	<i>n</i>
Medium-large employers (>50 people)	54	18	27	40	14	19	6	11	93
Small employers (11-50 people)	49	16	23	43	19	37	4	*	234
Micro-businesses (1-10 people)	55	26	29	41	19	39	3	*	942
Total	54	24	28	41	19	38	3	1	1,269

Base 1,269

Apprenticeships, Internships and Work Experience Placements

All employers were asked if they offer or would consider offering apprenticeships, graduate internships or work experience placements. Overall, 9% said they offer apprenticeships and a further 50% that they would consider offering them; 18% offer graduate internships and 36% that they consider doing so; and nearly half (49%) of employers offer work experience, while a further quarter (25%) would consider offering them.

Figure 8.28 Proportion of Employers Offering or Considering Offering Apprenticeships, Graduate Internships or Work Placement Posts

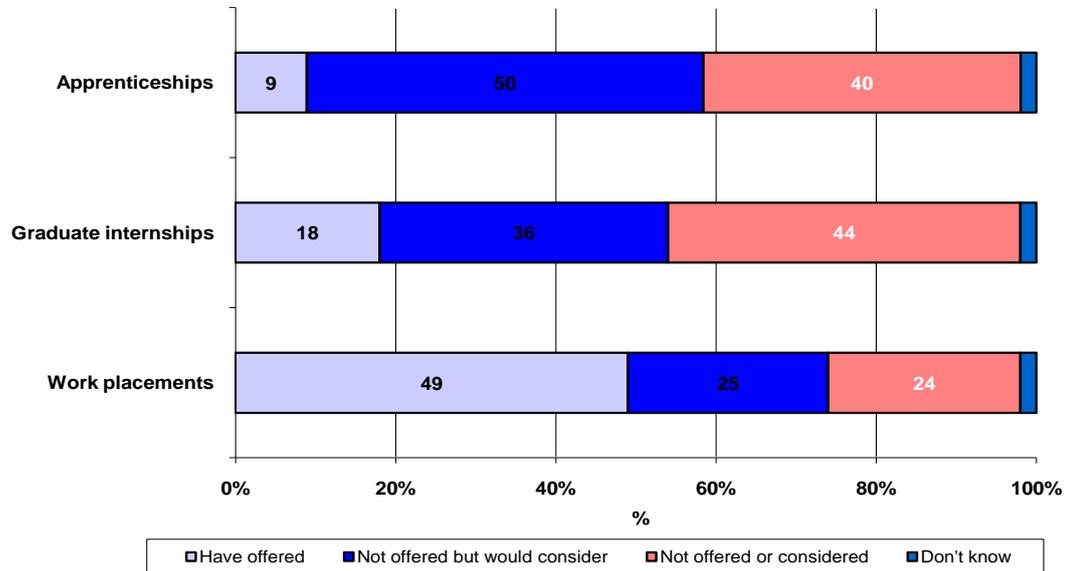
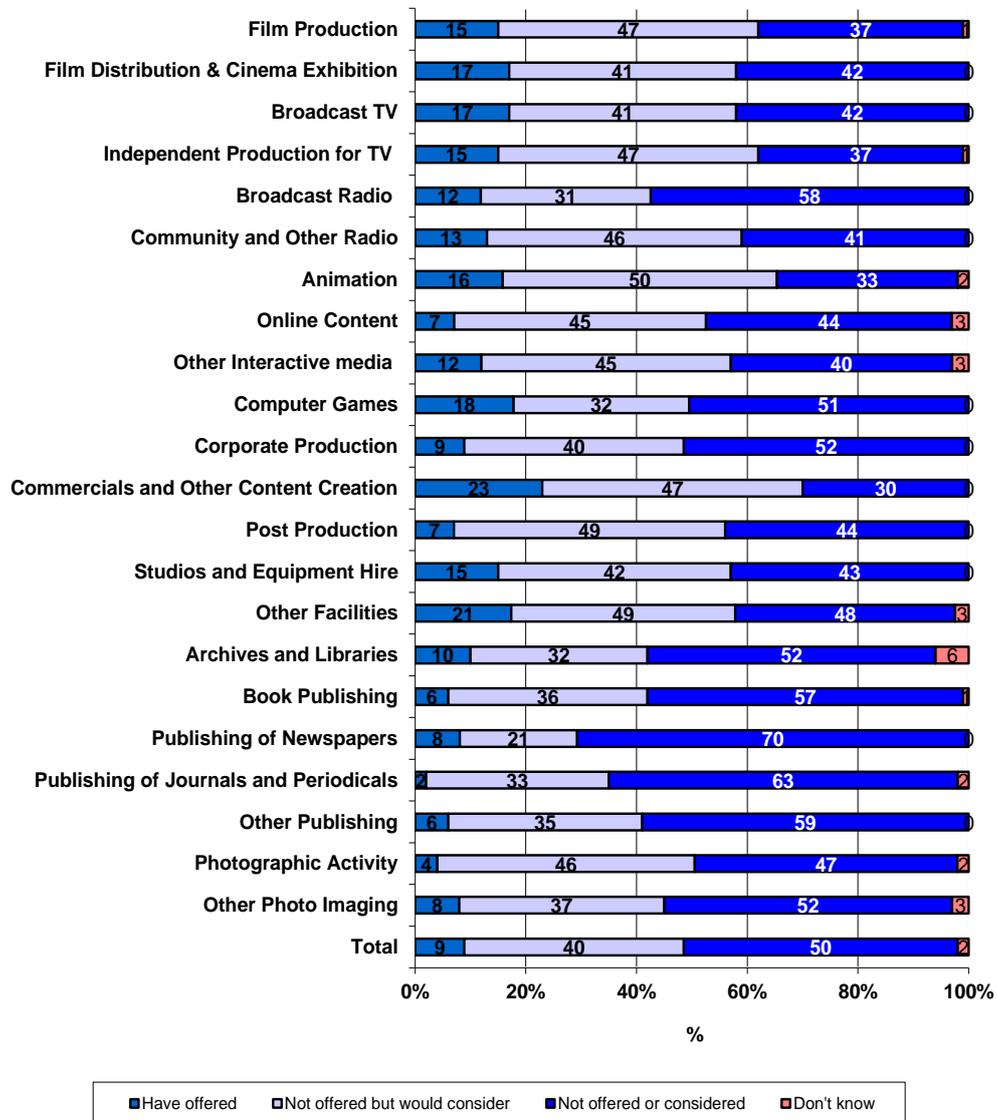


Figure 8.29 shows the percentages of employers in each sector who say that they offer or would consider offering apprenticeships. The highest proportion of employers saying either is in Commercials and other content creation (70%), followed by Animation (66%), Film Production (62%), and Broadcast Television (62%). The lowest are to be found in the Publishing sectors, ranging from 29% to 42%.

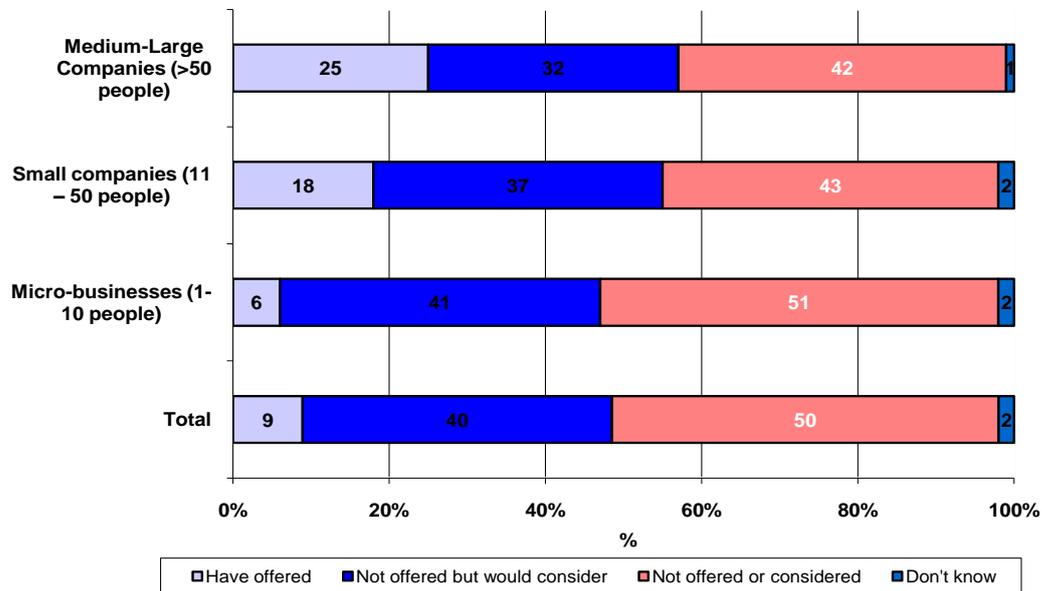
Figure 8.29 Proportion of Employers Offering or Considering Offering Apprenticeships, by Sector



Base 2,634

Micro-businesses are much less likely than small or medium-large employers to offer apprenticeships, though 41% say they would consider doing so.

Figure 8.30 Proportion of Employers Offering or Considering Offering Apprenticeships, by Company Size



Base 2,634

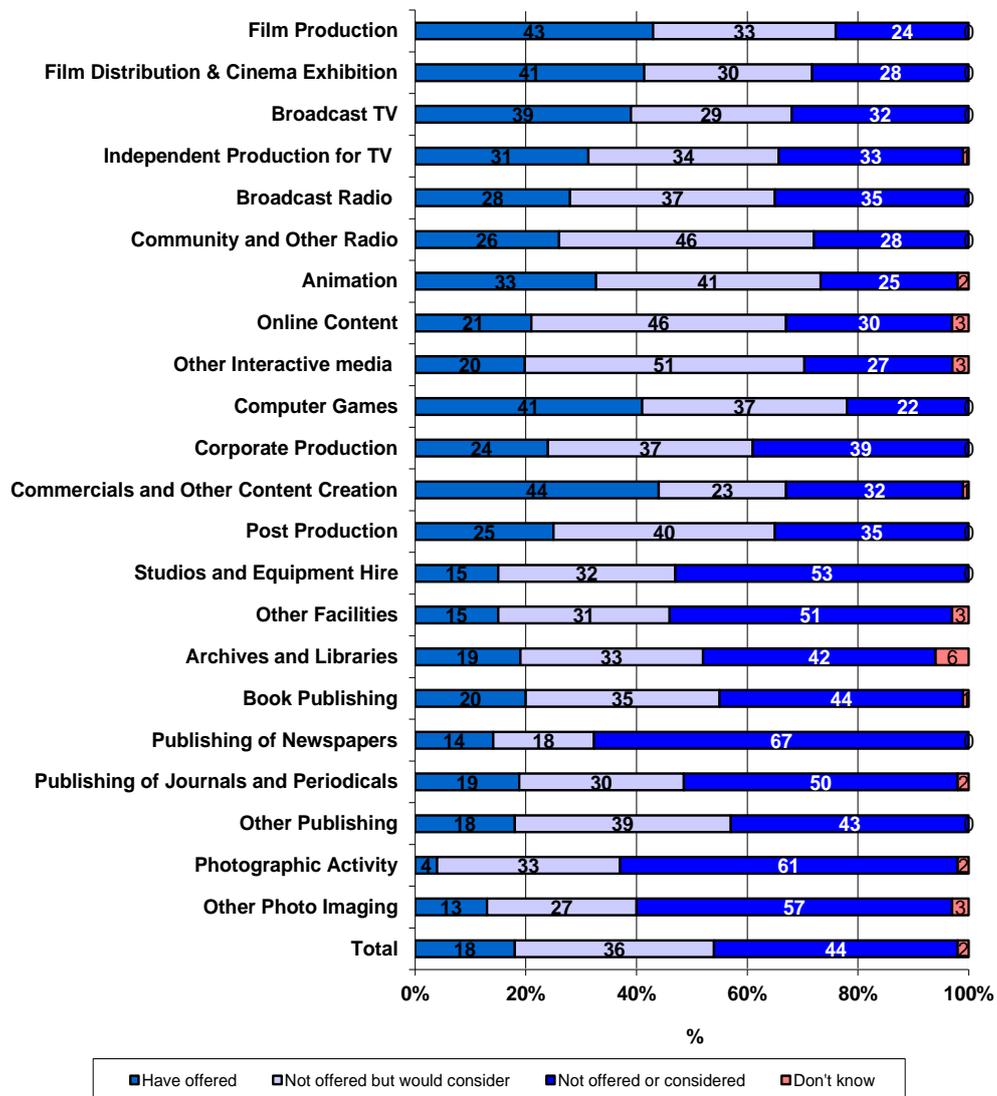
Employers who said they offered or would consider offering apprenticeships were asked in which occupation(s) they do so or would do so. The top ten occupations cited are listed in **Figure 8.31**. To a large extent, these reflect the occupations in which skills gaps were previously highlighted, with art and design, camera – photography, and distribution, sales and marketing the top three occupations. The top five occupations in which apprenticeships are or would be offered in each sector are listed in **Appendix E**.

Figure 8.31 Top Ten Occupations in Which Employers Offer or Would Consider Offering Apprenticeships

Occupation	%
Art and Design	18
Camera – Photography	16
Distribution, Sales and Marketing	15
Technical Development	15
Business Management	12
Editorial, Journalism and Sport	10
Production	10
Content Development	8
Editing	5
Engineering and Transmission	5
<i>Base</i>	1,312

Figure 8.32 shows the percentage of employers who offer or say they would consider offering graduate internships. To some extent, the pattern here reflects the prevalence of graduates working across the sectors, with the highest proportion in Computer Games (78%), Film Production (76%), Animation (74%), and community and other Radio (72%). The lowest proportions are in the Photo Imaging sectors, where the proportions of graduates employed are also lowest.

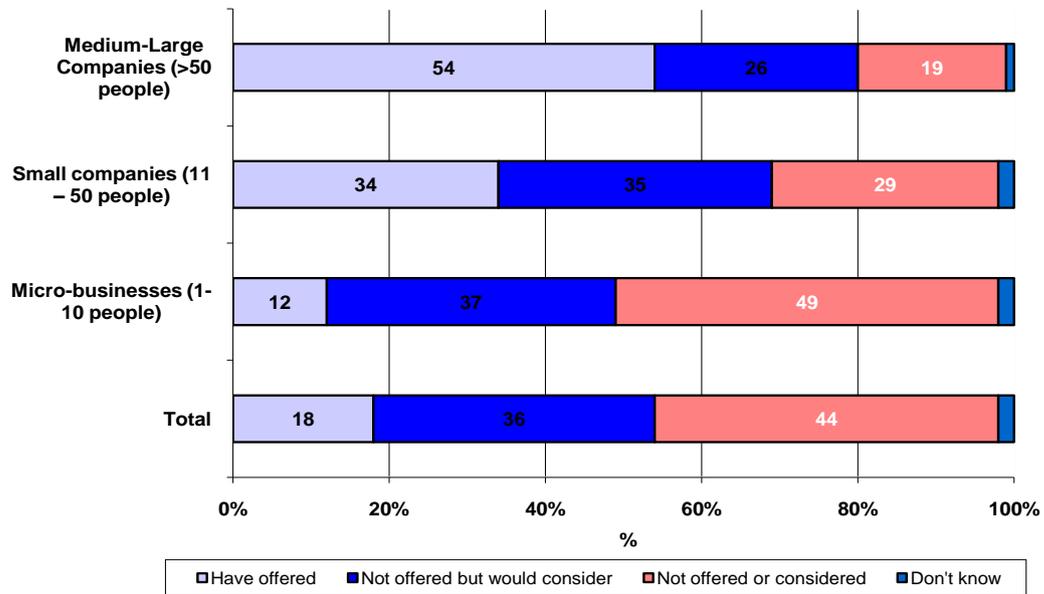
Figure 8.32 Proportion of Employers Offering or Considering Offering Graduate Internships, by Sector



Base 2,634

As with apprenticeships, the offering of graduate internships correlates with company size: 80% of medium-large employers offer or would consider offering them, compared with 69% of small employers and 59% of micro-businesses.

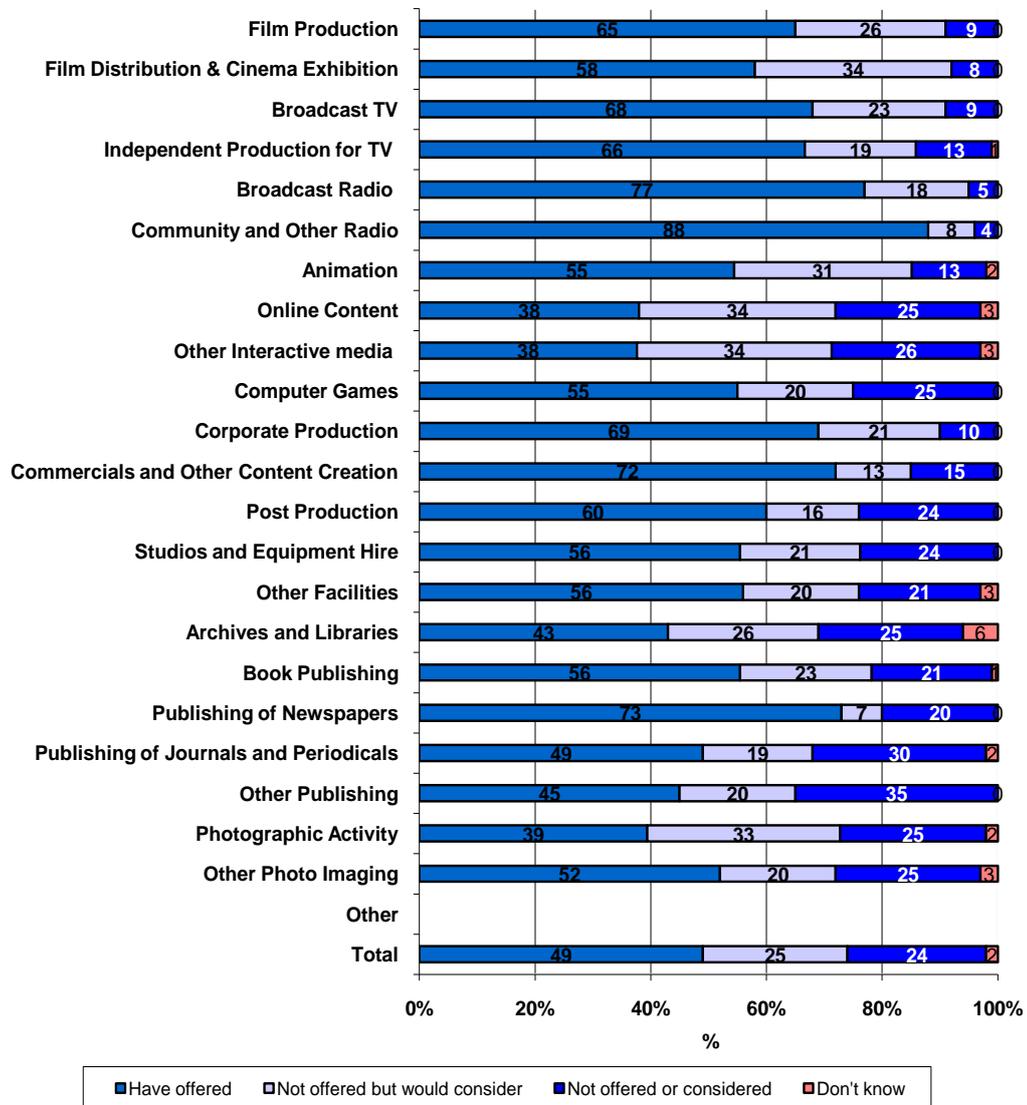
Figure 8.33 Proportion of Employers Offering or Considering Offering Graduate Internships, by Company Size



Base 2,634

As shown in **Figure 8.34**, the percentage of employers saying they offer or would consider offering work experience placements is highest in the sectors of Radio, Television and Film, lower in the Interactive Media and Post Production sectors, and lowest in Publishing and Photo Imaging.

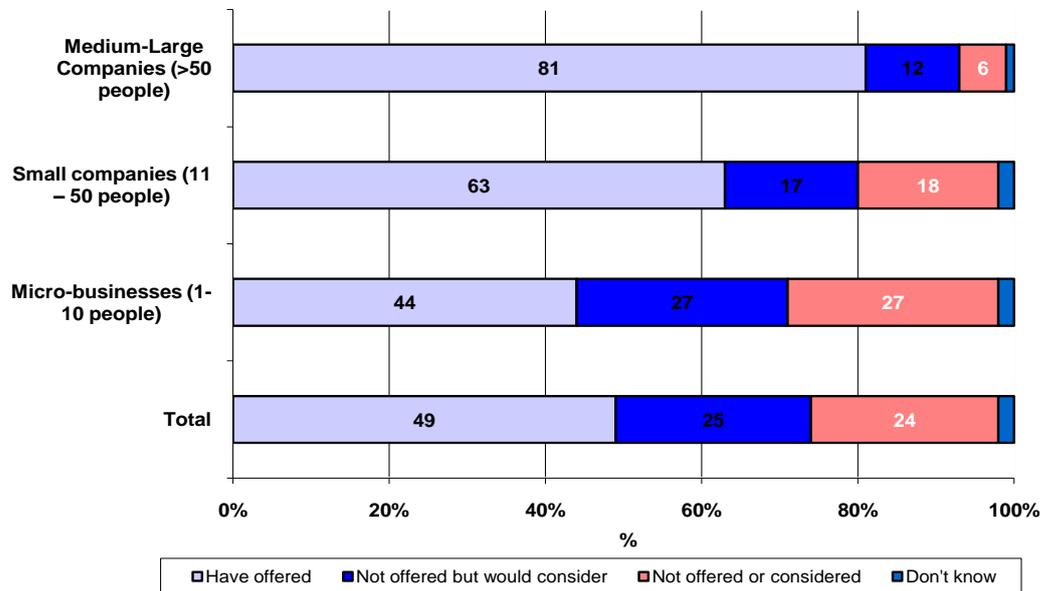
Figure 8.34 Proportion of Employers Offering or Considering Offering Work Placements, by Sector



Base 2,634

As with the other schemes, larger employers are more likely to offer work experience placements: 93% of medium-large employers say they offer them or would consider doing so, compared with 80% of small employers, and 71% of micro-businesses.

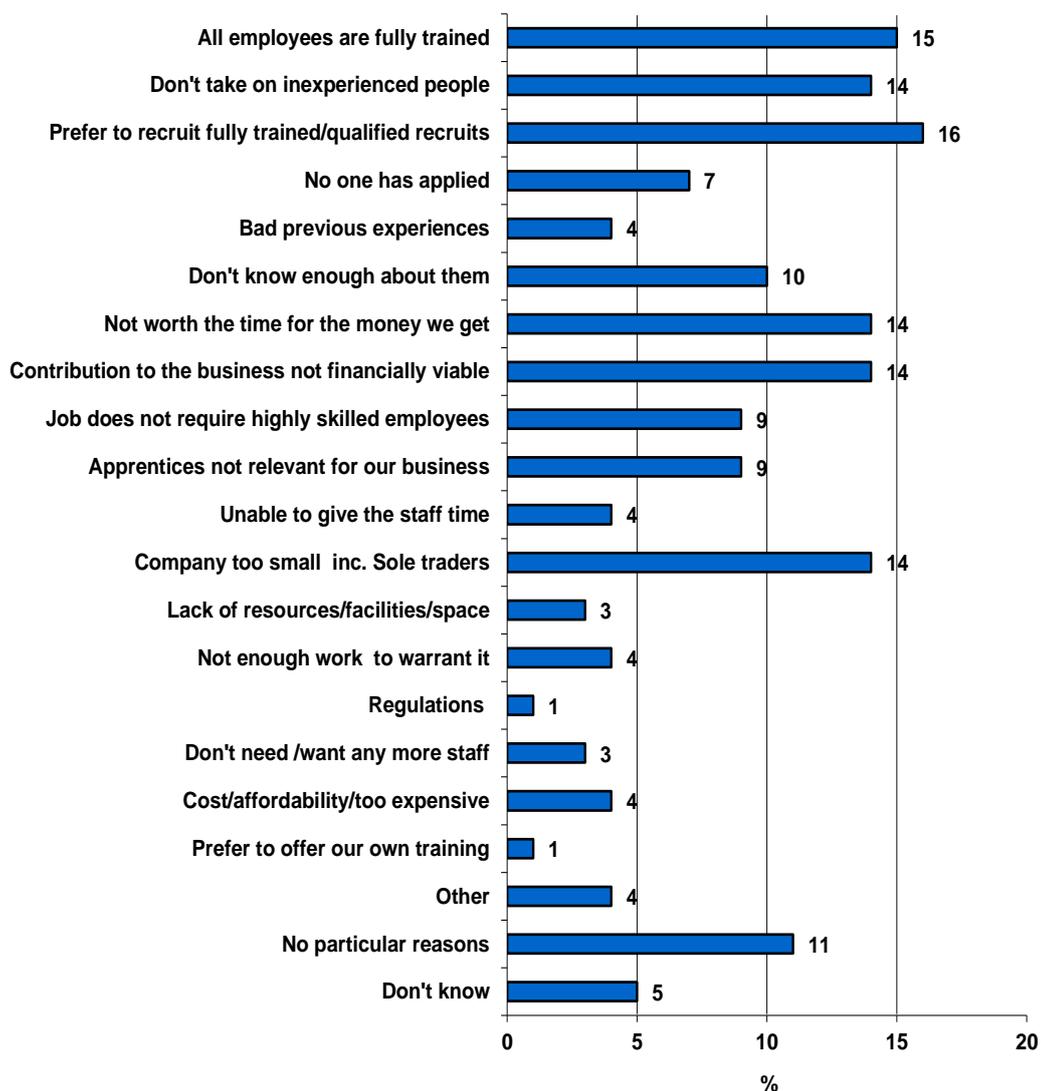
Figure 8.35 Proportion of Employers Offering or Considering Offering Work Placements, by Company Size



Base 2,634

Those employers who said they did not offer and would not consider offering apprenticeships or internships were asked the main reason(s) for this. The most commonly cited reasons are inter-related, with 16% saying they prefer to recruit fully trained or qualified people and 15% that their employees are fully trained.

Figure 8.36 Proportions of Employers Citing Each Reason for Not Offering Apprenticeships or Graduate Internships



Base 1,527

Figure 8.37 shows the percentages of employers citing each reason for not taking on apprentices or interns in each sector. The main points of note are:

- The preference for taking on people already experienced and/or reticence to take on inexperienced people is especially marked in the interactive sectors, Commercials and Corporate Production.
- A higher than average proportion of employers in both Radio sectors, Commercials, Corporate Production and Post Production say the contribution of the apprentice or intern to the business is not financially viable.

Figure 8.37 Proportions of Employers Citing Each of the Ten Most Common Reasons for Not Offering Apprenticeships or Graduate Internships, by Sector

	All employees are fully trained	Don't take on inexperienced people	Prefer to recruit fully trained/qualified recruits	Not relevant for type of business	Company too small	Don't know enough about them	Not worth the time for the money we get	Contribution to the business not financially viable	Job does not require employees to be that highly skilled	Other	No particular reason	Don't know	Base
	%	%	%	%	%	%	%	%	%	%	%	%	<i>n</i>
Film Production	5	12	5	14	12	0	5	15	0	7	24	9	29
Film Distribution & Cinema Exhibition	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	13
Broadcast TV	3	7	21	7	17	0	0	18	11	7	18	8	26
Independent Production for TV	12	12	15	10	3	8	15	11	3	3	7	9	93
Broadcast Radio	16	14	16	11	7	4	10	23	5	3	5	16	44
Community and Other Radio	10	0	7	5	0	3	9	21	5	10	0	9	36
Animation	17	14	21	8	13	6	9	8	4	4	6	13	44
Online Content	16	17	17	7	16	9	12	16	3	3	11	6	207
Other Interactive Media	15	20	14	14	11	10	14	16	3	3	4	8	83
Computer Games	12	28	24	10	5	4	19	29	6	0	0	9	28
Corporate Production	12	16	21	10	11	9	15	21	2	5	11	5	55
Commercials and Other Content Creation	18	29	26	7	8	6	24	21	12	6	3	15	25
Post Production	3	17	8	3	15	14	11	25	4	6	9	6	30
Studios and Equipment Hire	11	6	9	15	17	5	9	15	7	6	11	2	62
Other Facilities	10	12	9	16	10	8	6	6	6	0	13	5	60
Archives and Libraries	23	21	18	10	17	3	6	12	3	0	6	1	25
Book Publishing	22	7	18	7	24	3	16	23	6	2	6	7	76

Publishing of Newspapers	17	11	23	13	5	2	11	6	1	0	16	15	92
Publishing of Journals and Periodicals	17	22	19	4	20	6	4	14	7	3	17	6	125
Other Publishing	16	16	21	11	7	23	22	8	11	7	15	4	34
Photographic Activity	16	13	11	6	20	11	18	12	8	4	12	1	264
Other Photo Imaging	15	12	16	9	10	10	12	19	24	2	12	3	69
Total	15	14	16	9	14	10	14	14	9	4	11	5	1,527

Base 1,527

Finally in this section, respondents currently offering work experience placements were asked through which type of organisation these were organised. The most common response is through personal contact with individuals, which 71% of employers indicate. Over half (56%) say it is through schools, 40% universities, and 40% colleges.

Figure 8.38 Proportions of Employers Organising Work Placements Through Each Type of Organisation, by Sector

	Schools	Colleges	Universities	Personal contacts from individuals looking for experience	Other ways	Don't know	Base
	%	%	%	%	%	%	<i>n</i>
Film Production	48	31	38	93	15	0	42
Film Distribution & Cinema Exhibition	64	53	34	84	26	0	20
Broadcast TV	50	42	60	77	18	0	34
Independent Production for TV	50	54	52	92	8	0	128
Broadcast Radio	41	59	55	85	14	0	57
Community and Other Radio	93	75	68	82	15	0	62
Animation	49	43	55	87	1	1	58
Online Content	52	45	41	71	10	4	143
Other Interactive Media	38	37	50	68	14	1	66
Computer Games	78	40	54	71	13	0	27
Corporate Production	48	41	52	82	16	0	59
Commercials and Other Content Creation	83	85	48	90	10	0	24
Post Production	51	60	46	76	9	0	33
Studios and Equipment Hire	48	46	38	74	11	2	57
Other Facilities	61	45	61	70	5	2	50
Archives and Libraries	21	52	45	58	23	0	22
Book Publishing	36	25	38	72	17	0	72
Publishing of Newspapers	68	45	44	57	11	1	97
Publishing of Journals and Periodicals	58	38	36	71	9	5	105
Other Publishing	49	24	42	79	6	0	25
Photographic Activity	65	43	24	65	9	2	168
Other Photo Imaging	70	37	19	49	9	5	56
Other	n/a	n/a	n/a	n/a	n/a	n/a	5
Total	56	40	40	71	10	2	1,410

Base: 1,410

Appendix A: Specific Skills Gaps specified by Employers within the wider Content for Multiple Platforms, Business, Technical and Production Skills Areas

Skills to develop content for multiple platforms	Business Skills	Technical Skills	Production Skills
Design and Development of Web Sites or Web Applications	General Business skills/knowledge	Computer Programming	TV/Video production
Online and Social Media Publishing or Content Distribution	Commercial Awareness	Computer/software usage	General production skills
Computer Skills - General	Entrepreneurial skills	web/internet design/development	Online production
Design and Development of Mobile Applications	Business Planning/Strategy	Editing	Design skills
Knowledge of Platforms in General	Finance	CGI: 3D/Animation/VFX/Graphic design	Production management
Other specific multi-platform skills	Project Management	General technical skills	Film/Film production
Computer Skills - Specific Software Package(s)	Monetising Content	Sound	Other specific production skills
Knowledge of new technology and platforms	Management	Camera skills	Post production
Software Development Skills - Specific Language(s)	Business development	Computer/software development	Knowledge and Experience
Writing and Editorial	Time Management	Other specific technical skills	
Software Development Skills - General	Account/client management	Photographic skills	
Design and Creation of Digital Content for Individual Platforms	Running a business	Other IT skills	
Computer Skills - Hardware, Networks and Infrastructure	Pitching, presentation and proposal writing	Knowledge of new technology and platforms	
Design and Creation or Repurposing of Content Across Platforms	Administration		

Appendix B: Skills that Employers anticipate will be difficult to meet the need for in the next three to five years within the wider areas of Content for Multiple Platforms, Business, Technical and Production.

Skills to develop content for multiple platforms	Business Skills	Technical Skills	Production Skills
Design and Development of Web Sites or Web Applications	Business Planning/Strategy	Computer Programming	TV/Video production
Computer Skills - General	Entrepreneurial skills	Web/internet design/development	Other specific production skills
Design and Development of Mobile Applications	Other specific business skills	Editing	General production skills
Other specific multi-platform skills	Commercial Awareness	Other specific technical skills	Design skills
Knowledge of new technology and platforms	General Business skills/knowledge	Knowledge of new technology and platforms	Online production
Online and Social Media Publishing or Content Distribution	Monetising Content	Other IT skills	Pre-press production
Software Development Skills - Specific Language(s)	Management	CGI: 3D/Animation/VFX/Graphic design	Production management
Computer Skills - Hardware, Networks and Infrastructure	Business development	Sound	
Design and Creation or Repurposing of Content Across Platforms	Finance	Computer/software development	
Equipment Skills - Specific Tool(s)	Project Mgt	Computer/software usage	
Offline Digital Publishing or Content Distribution	Account/client management	Camera skills	
Digital Broadcasting and Digital Projection		Photographic skills	

Appendix C: Top Ten Skills Areas in which Learning and Development have been offered in the Past Twelve Months in each Sector

Ranking	Film Production	%	Broadcast TV	%	Independent TV Production	%	Broadcast Radio	%	Community & Other Radio	%	Animation	%
1	Finance skills	45	Leadership and Management skills	69	Skills in using software packages	49	Sales and Marketing skills	66	Production skills	48	Skills in using software packages	51
2	Leadership & Management skills	41	Skills in using software packages	61	Technical skills	46	Leadership and Management skills	60	Technical skills	45	Technical skills	45
3	Creative talent	37	Finance skills	51	Creative talent	32	Skills to develop content for multiple platforms	41	Skills in using software packages	44	Leadership and Management skills	38
4	Sales & Marketing skills	37	Creative talent	34	Leadership and Management skills	30	Skills in using software packages	38	Leadership and Management skills	43	Finance skills	24
5	Production skills	31	Sales and Marketing skills	31	Production skills	29	Finance skills	36	Creative talent / Multi-skilling*	30	Other	23
6	Skills in using software packages	30	Skills to develop content for multiple platforms	29	Other	28	Technical skills	29	Sales and Marketing skills	29	Production skills	22
7	Technical skills	26	Technical skills / Multi-skilling*	24	Business skills	24	Business skills / Creative talent*	27	Other	28	Sales and Marketing skills	20
8	Business skills	18	Business skills	21	Finance skills	22	Other	22	Skills to develop content for multiple platforms	21	Multi-skilling	14
9	Other / Skills to develop content for multiple platforms*	12	Other	20	Sales and Marketing skills	17	Multi-skilling	21	Business skills	20	Business skills	12
10	Multi-skilling / Set or craft skills*	10	Production skills	11	Multi-skilling	15	Production skills	19	Finance Skills	17	Creative talent	11
Base (n)		39		36		118		53		41		45

* These represent different skills areas identified by an equal proportion of employers

Appendix C: Top Ten Skills Areas in which Learning and Development have been offered in the Past Twelve Months in each Sector

Ranking	Online Content	%	Other Interactive Media	%	Computer Games	%	Corporate Production	%	Post Production	%
1	Technical skills	46	Technical skills	45	Skills in using software packages	51	Technical skills	68	Technical skills	71
2	Skills in using software packages	44	Skills in using software packages	36	Leadership and Management skills	47	Skills in using software packages	56	Skills in using software packages	48
3	Leadership and Management skills	28	Sales and Marketing skills	32	Technical skills	33	Leadership and Management skills / Sales and Marketing skills*	28	Leadership and Management skills	37
4	Sales and Marketing skills	26	Leadership and Management skills	28	Business skills	27	Production skills	23	Sales and Marketing skills	26
5	Skills to develop content for multiple platforms	25	Skills to develop content for multiple platforms / Business skills*	20	Other	26	Business skills	20	Production skills / Creative talent*	24
6	Business skills	23	Other	19	Skills to develop content for multiple platforms / Finance skills*	23	Other	17	Set or Crafts skills	19
7	Other	20	Finance skills	13	Creative talent	21	Creative talent	15	Business skills	18
8	Multi-skilling	15	Creative talent / Multi-skilling*	11	Sales and Marketing skills	17	Skills to develop content for multiple platforms	14	Finance skills	14
9	Finance skills	11	Set or craft skills / Production skills*	3	Multi-skilling	16	Finance skills / Multi-skilling*	13	Other	13
10	Production skills / Creative talent*	10	Soft skills	1	Production skills	13	Set or craft skills	4	Multi-skilling	10
Base (n)		170		96		29		52		23

* These represent different skills areas identified by an equal proportion of employers

Appendix C: Top Ten Skills Areas in which Learning and Development have been offered in the Past Twelve Months in each Sector

Ranking	Studio & Equipment Hire	%	Other Facilities	%	Archives & Libraries	%	Book Publishing	%	Publishing of Newspapers	%
1	Technical skills	46	Skills in using software packages	50	Technical skills	48	Skills in using software packages	54	Sales and Marketing skills	52
2	Skills in using software packages	43	Technical skills	37	Other	36	Technical skills	35	Skills in using software packages	50
3	Other	31	Other	35	Skills in using software packages	29	Leadership and Management skills	34	Leadership and Management skills	46
4	Leadership and Management skills	29	Leadership and Management skills	28	Business skills	20	Finance skills	33	Skills to develop content for multiple platforms	45
5	Sales and Marketing skills	26	Sales and Marketing skills	26	Creative talent	14	Sales and Marketing skills	30	Technical skills	37
6	Production skills	17	Multi-skilling	23	Leadership and Management skills	13	Business skills	25	Multi-skilling	27
7	Multi-skilling	15	Set or Crafts skills	21	Sales and Marketing skills	5	Other	20	Creative talent	25
8	Skills to develop content for multiple platforms / Business skills / Set or craft skills*	13	Business skills	16	Finance skills	3	Creative talent	19	Other	23
9	Finance skills	12	Finance skills	14	Production skills	3	Skills to develop content for multiple platforms / Production skills*	15	Production skills	22
10	Creative talent	6	Production skills	13	Set or Crafts skills / Multi-skilling*	2	Multi-skilling	13	Business skills	15
Base (n)		58		49		22		63		77

* These represent different skills areas identified by an equal proportion of employers

Appendix C: Top Ten Skills Areas in which Learning and Development have been offered in the Past Twelve Months in each Sector

Ranking	Publishing of Journals & Periodicals	%	Other Publishing	%	Photographic Activity	%	Other Photo Imaging	%	Total Creative Media	%
1	Sales and Marketing skills	52	Sales and Marketing skills	51	Skills in using software packages	57	Skills in using software packages	58	Skills in using software packages	47
2	Leadership and Management skills	46	Skills in using software packages	44	Technical skills	51	Technical skills	47	Technical skills	42
3	Skills in using software packages	39	Technical skills	34	Sales and Marketing skills	40	Sales and Marketing skills	42	Sales and Marketing skills	36
4	Technical skills	34	Leadership and Management skills	25	Business skills	23	Leadership and Management skills	22	Leadership and Management skills	30
5	Business skills	27	Skills to develop content for multiple platforms	24	Creative talent	22	Business skills / Other	21	Business skills	21
6	Skills to develop content for multiple platforms	19	Production skills	20	Multi-skilling	17	Production skills	17	Other	19
7	Multi-skilling	16	Business skills	17	Finance skills / Production skills*	14	Multi-skilling	14	Skills to develop content for multiple platforms	17
8	Finance skills	14	Finance skills	11	Other	13	Finance skills / Set or Crafts skills*	12	Finance skills	16
9	Creative talent	13	Creative talent	10	Leadership and Management skills	12	Creative Talent	7	Production skills / Multi-skilling*	15
10	Other	12	Multi-skilling	7	Set or Crafts skills	11	Skills to develop content for multiple platforms	4	Creative talent	14
Base (n)		89		26		142		36		1300

* These represent different skills areas identified by an equal proportion of employers

Appendix D: Specific Areas in which Learning and Development was funded or arranged by Employers for Skills to Develop Content for Multiple Platforms, Business Skills, Technical Skills and Production Skills

Skills to develop content for multiple platforms	Business Skills	Technical Skills	Production Skills
Software Development Skills - Specific Language(s)	General Business skills/knowledge	Computer/software usage	Other specific production skills
Online and Social Media Publishing or Content Distribution	Business Planning/Strategy	Computer Programming	Design skills
Writing and Editorial	Administration	Editing	TV/Video production
Design and Development of Mobile Applications	Compliance and legal	Other specific technical skills	General production skills
Equipment Skills - Specific Tool(s)	Commercial Awareness	web/internet design/development	Pre-press production
Computer Skills - Specific Software Package(s)	Monetising Content	Sound	Production management
Other specific multi-platform skills	Finance	Camera skills	Music production
Computer Skills - General	Project Management	CGI: 3D/Animation/VFX/Graphic design	Post production
Software Development Skills - General	Other specific business skills	Other IT skills	Film/Film production
	Business development	Photographic skills	Online production
	Management	Computer/software development	
	Entrepreneurial skills	General technical skills	
	Customer services	Knowledge of new technology and platforms	
	Account/client management		
	Negotiation Skills		

Appendix E: Top Five Occupational Groups in which Employers Offer or Would Consider Offering Apprenticeships

Ranking	Film Production	%	Broadcast TV	%	Independent TV Production	%	Broadcast Radio	%	Community & Other Radio	%
1	Production	70	Engineering and Transmission	29	Production	49	Production	37	Production	26
2	Business Management	22	Production	28	Editing	14	Distribution, Sales and Marketing	32	Other	25
3	Editing	13	Business Management	23	Camera – Photography / Other*	13	Business Management	23	Business Management	22
4	Creative Development	9	Other	17	Art and Design / Business Management*	9	Editorial, Journalism and Sport	22	Engineering and Transmission	18
5	Strategic Management / Other*	7	Performers	12	Engineering & Transmission / Audio, Sound, Music*		Other	8	Strategic Management	14
Base (n)		49		25		122		34		40

Ranking	Animation	%	Online Content	%	Other Interactive Media	%	Computer Games	%	Corporate Production	%
1	Animators	57	Technical Development	41	Technical Development	44	Technical Development	49	Production	30
2	Art and Design	25	Content Development	35	Distribution, Sales and Marketing	24	Art and Design	43	Other	20
3	Production	24	Art and Design	26	Art and Design	22	Business Management	26	Business Management	15
4	Engineering and Transmission	8	Distribution, Sales and Marketing	13	Business Management	15	Distribution, Sales and Marketing	12	Technical Development	12
5	Other	6	Business Management	8	Content Development	10	Production	10	Editing	11
Base (n)		63		210		99		24		44

* These represent different skills areas identified by an equal proportion of employers

Appendix E: Top Five Occupational Groups in which Employers Offer or Would Consider Offering Apprenticeships

Ranking	Post Production	%	Studio & Equipment Hire	%	Other Facilities	%	Book Publishing	%	Publishing of Newspapers	%
1	Editing	40	Engineering and Transmission	27	Engineering and Transmission	22	Editorial, Journalism and Sport	47	Editorial, Journalism and Sport	63
2	Production	25	Business Management	14	Art and Design / Other	16	Distribution, Sales and Marketing	26	Business Management	14
3	Engineering and Transmission	13	Audio, Sound, Music / Other*	13	Manufacture	12	Art and Design	17	Art and Design	12
4	Technical Development	8	Editing	11	Technical Development	8	Business Management	16	Distribution, Sales and Marketing	11
5	Audio, Sound, Music / Distribution, sales & marketing / Other*	7	Production	10	Production / Camera – Photography / Lighting*	6	Technical Development / Other*	9	Technical Development / Other*	9
Base (n)		28		55		43		49		45

Ranking	Publishing of Journals & Periodicals	%	Other Publishing	%	Photographic Activity	%	Other Photo Imaging	%	Total Creative Media	%
1	Editorial, Journalism and Sport	53	Art and Design	31	Camera – Photography	77	Camera – Photography	26	Art and Design	18
2	Distribution, Sales and Marketing	35	Distribution, Sales and Marketing	23	Editing	13	Retail and Exhibition	17	Camera – Photography	16
3	Art and Design	28	Editorial, Journalism and Sport	21	Distribution, Sales and Marketing	9	Distribution, Sales and Marketing	16	Technical Development / Distribution, Sales and Marketing	15
4	Business Management	15	Business Management	21	Business Management	7	Library and Archives	12	Business Management	12
5	Production	7	Other	13	Art and Design	6	Art and Design	11	Production / Editorial, journalism & sport*	10
Base (n)		67		21		198		43		1312

* These represent different skills areas identified by an equal proportion of employers