skillset
The Sector Skills Council for Creative Media

Sector Skills Assessment for the Creative Media Industries in Northern Ireland

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Alliance
Sector Skills Councils

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Executive Summary

- The Creative Media Industries are a major contributor to the Northern Ireland's economy and employers from across the Creative Media Industries remain confident that they will grow at a faster rate than the wider economy in the coming years, particularly activities that are export focused.

- In Northern Ireland, 10,900[1] people work in the Creative Media Industries. Significantly, Skillset's 2009 Employment Census (which excludes Publishing, Photo Imaging and Advertising) showed a significant increase in Creative Media employment in NI from 3,200 in 2006 to 6,300 in 2009.[2] This trend is broadly supported by data from the NI Department for Enterprise, Trade and Investment (DETI) Census, which has also shown increases in NI Creative Media Industries employment in recent years. In contrast, between 2006 and 2009, the UK has seen a decrease in employment in the sector.

- In Skillset's consultation with employers and Creative Media representatives in October 2010 there was agreement that the growth of digital communications and global supply networks presented major opportunities for strong to medium term growth across the sector if some of the barriers listed below can be overcome.

- The major opportunities for the sector as a whole are hampered by current silos between some parts of the Creative Media sector. For example, more established Television and Film companies are not embracing new digital content areas as quickly as they perhaps should. Digital Content providers for broadcast, web, mobile phones and Computer Games industry are restricted by the small size of too many companies and a lack of development opportunities. Too many people are reliant on too few resources. Business and leadership and management skills are too often lacking.

- The main areas of skills needs and shortage are as follows:

  Multi-skilling: an understanding of different technology platforms and their impact on content development and digital work flow, and new approaches to working in cross-functional creative / technical teams within and across companies.

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[1] Skillset 2009 Employment Census (all creative sub-sectors excluding Film Production, Photo Imaging, Publishing and Advertising), secondary analysis of unit lists for 2009 feature film productions (80 minutes or longer) and Labour Force Survey, ONS July 2009 – June 2010.

[2] Skillset (2006) Employment Census and Skillset (2009) Employment Census respectively

Multiplatform skills: an understanding of how to create, market and distribute content across a range of channels, and the ability to understand and exploit technological advances.

Management, leadership, business and entrepreneurial skills: especially project management for multi-platform development; the hybrid skills combining effective leadership with innovation, creativity and understanding of technology, and the analytical skills to understand audience interests and translate it into business intelligence.

IP and monetisation of multiplatform content: understanding of intellectual property legislation to protect from piracy, and exploiting intellectual property internationally to take full advantage of emerging markets - with particular focus on the ability to deal with the problem of illegal downloading and copyright infringement.

Sales and marketing: being particularly important in digital content providers, Radio and an emerging need in other sectors.

Diagonal thinking: the ability to tell great stories, then know how to monetise those stories to the best effect utilising media that cross platforms and territories well.

1 Introduction

Skillset is the UK Sector Skills Council for the Creative Media Industries, representing fourteen sectors which are grouped into six sectors of the DCMS Creative Industries classification. Skillset Northern Ireland seeks to raise skills levels throughout the Creative Media Industries in Northern Ireland, and works with a number of partners to achieve this goal, particularly Northern Ireland Screen, the local agency with responsibility for the development of the screen industries in Northern Ireland. Our other public sector partners include Invest NI, the Department for Employment and Learning (DEL) and the Department of Culture, Arts and Leisure (DCAL).

At the heart of the Creative Industries, the Creative Media sector includes companies involved in: TV, Radio, Film, Interactive Media, Animation, Content for Computer Games, Facilities (including Visual Effects), Commercials and Promos, Corporate Production, Photo Imaging, Publishing, Advertising and Fashion & Textiles[3]. Within NI some of these sectors are more mature and established such as Radio and Publishing, while others have emerged more recently with technological advances e.g. Visual Effects and Content for Computer Games.

Within the wider definition of the Creative Industries, the Creative Media Industries are bound by common output in the form of creative content and increasingly the boundaries between these businesses and sectors are becoming blurred. Whilst there are still key distribution platforms including; cinema, TV, books / print media and online and mobile, companies creating content are doing so in a way that can be used for multiple platforms. The business context is providing an opening of channels for distribution meaning that 'multi-platform content' is critical.

1.1 Overview of Current and Future Skills Priorities

Since a separate UK-wide version of this document exists to summarise key policy messages at a national level, some of these challenges (particularly global trends) are not considered in detail in this NI report. This does not mean these challenges are not relevant in Northern Ireland; rather, we focus here on a smaller number of the most important issues affecting Creative Media within the nation.

It was clear from the qualitative phase of research conducted by Skillset Northern Ireland in October 2010 that the size and scale of the Creative Media Industries in Northern

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[3] A separate SSA has been produced for the Fashion and Textiles Industry

Ireland created barriers to growth.[4] Its dominant sectors are Television, Publishing and Radio – in particular Community Radio, which uniquely, compared to other parts of the UK Radio industry, attracts large numbers of volunteers. For digital content providers the lack of a Computer Games industry of scale in Northern Ireland means a lot of home grown talent exits for opportunities outside the country. The average small size of digital companies stops economies of scale being created which means that development opportunities are scarce and insufficient development is therefore conducted. Many practitioners in digital technologies are self-taught. There is therefore an urgent need to break down silos. Many digital content businesses have been set up by young highly educated entrepreneurs who often lack business experience and have little knowledge of Sales, Marketing, Accountancy and other business skills. Technical Skills including Programming Languages, Design Skills for animation and web, Infrastructure Management, skills relating to building Games, User Interface Design, and programming are all skills gaps and areas of skills shortage. The key problem is being able to build and retain skills in Northern Ireland. Zoogloo a leading Animation company, lost three jobs recently simply because they could not get the right experienced talent to work on the opportunities. New and traditional media continue to be 'siloed' in Northern Ireland with less creative interplay between TV and Film on one side and Mobile and Web development on the other, and smaller 'silos' in between.

Social Media, Social Media integration, Mobile (including phone) and Content for Computer Games[5] were all identified as areas for emerging skills and occupations. However this required established Television and Film producers to embrace new ways of developing digital content for multi-platform use. There is a lot of innovation in short form film making for digital platforms but the mainstream broadcasters do not seem interested in supporting this kind of innovation, possibly because it was seen as too close to user generated content with its lower production values.

The supply side in Northern Ireland was reviewed as not up to the mark in providing the right 'job-ready' graduates. Too many courses were identified as not teaching material relevant for the industry and being about two years behind industry. There are two new courses in development through the University of Ulster, one a Masters and one an Undergraduate programme for introduction in 2012, which look promising in terms of

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[4] Findings in this section unless otherwise stated from focus group with Northern Irish employers and stakeholders undertaken in October 2010 as part of Skillset's employer and stakeholder qualitative framework 2010.

[5] Skillset has contributed to the BIS/DCMS commissioned NESTA review of skills in Games and VFX chaired by Ian Livingstone and Alex Hope. Due to be published on 1st February 2011 the review will provide a comprehensive overview of current skills issues and policy recommendations for these sectors across the UK.

developing the right kind of graduates for the digital content sector. Other courses at some FE colleges are offering good placements suitable for the industry which on the whole seem less interested in formal qualifications than in workplace experience.

For the more mature sectors such as Television the sense was that the graduates coming into news journalism were as good as ever and many new entrants had the requisite multi-platform skills the industry needed. The stock of workers were more of a problem in this regard having fewer T-skills than younger entrants. With younger people in the industry there was less willingness to work their way up the 'greasy pole'. Many wanted to start at, or near, the top and expected to be producing or directing very soon into their careers. This was creating management problems for older managers.

In Publishing the move into e-publishing was affecting the sector considerably, putting a strain on traditional marketing, supply chain and sales areas. Whereas for Film the challenge remained a lack of graduates coming into the sector with the ability to tell a story well. The major public and private sector broadcasters were seen as having a major responsibility for training across many areas of the Creative Media sector.

Other issues for the Creative Media sector in Northern Ireland include getting on top of how to monetise IP from digital content, building capacity for the sector as a whole and infrastructure improvement such as the speed and quality of broadband.

1.2 Research and Data

The analysis in this document is based on reliable data from high quality sources. This includes sector-endorsed primary research from Skillset and where possible secondary data sources such as the Office of National Statistics' Annual Business Inquiry (ABI), Labour Force Survey (LFS) and Inter-Departmental Business Register (IDBR); the DETI's Bi-Annual Census of Employment; and the DCMS Creative Industries Economic Estimates Statistical Bulletin.

This work recognises the limitations of official data sources that rely on Standard Industrial and Standard Occupational Classifications for the Creative Media Industries, key elements of which are not served well by the classifications or the data that rely on them. Further detail on the limitations is provided in Annex B, but in brief:

- Key elements of the Creative Media Industries sit in broad classifications that include activity outside of Creative Media preventing any discrete and crucial analysis e.g. Interactive Media, Content for Computer Games and Facilities.

- Official data sources to a greater or lesser extent systematically exclude the increasing freelance labour pool required to create and distribute the creative content upon which our economy is becoming increasingly reliant.

- In some cases sample sizes are too small to enable discrete analysis of data contained within SIC that do exist. This is particularly true for NI which is the smallest nation within the UK (and thereby has the smallest sample size). However, SIC employee data from DETI's 2007 Census of Employment offers an alternative source.

Gaps in official data sources have been filled by the primary research programme Skillset manages which was established by the Audio Visual Industries Training Group a decade ago and has since been steered by the same organisations involved[6].

Due to the low base sizes in Northern Ireland, Labour Force Survey data for the Photo Imaging, Publishing and Advertising sectors cannot always be included in cross-sector statistics. Skillset's (2010) Creative Media Workforce Survey, from which data will be available in 2011, will enable future analysis of these sectors at a National level.

[6] www.skillset.org/research/committee

2 What Drives Skills Demand?

2.1 Contribution of the Sector

The Creative Media Industries in Northern Ireland have been identified as a significant opportunity for wealth and job creation. This is illustrated by the strong pick-up in growth in employee jobs from the mid-1990s, which remained largely unbroken up until the wider economic recession in late 2008 and 2009.[7]

The Creative Media Industries make an important contribution to Northern Ireland's economy and to the cultural development and heritage of the country, as well as helping to diversify the economy and support the transition towards a high-value added knowledge-based economy.

It is important to note as well that the importance of the wider Creative Industries in NI is reflected in the Programme for Government. One of the Public Service Agreement (PSA) sub-objectives is to grow the Creative Industries sector by 15% between 2007 and 2011, though it is not particularly clear whether growth is to be in terms of GVA or employment.

There are an estimated 700 Creative Media companies (not including sole-traders) in Northern Ireland and a breakdown by broad sector can be found in Table 1.[8] In terms of company size it is likely that companies based in Northern Ireland will follow the same trend as the wider UK, where SMEs dominate numbers. The vast majority (84%) of companies across the UK Creative Media Industries are small (fewer than 10 people) and just 2% of companies are large (100 people and more).[9]

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[7] Official data sources (ABI and LFS). These exclude Facilities, Interactive Media, Content for Computer Games and either part or all of the freelance workforce.

[8] 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 (Content for Computer Games) and IDBR 2009 (Photo Imaging, Publishing and Advertising).

[9] Skillset (2009) Employment Census and IDBR 2009 (Photo Imaging, Publishing and Advertising).

Table 1: Company breakdown[10]

Sector	Number of Companies
Television	50
Radio	< 25
Film[11]	< 25
Animation	< 25
Interactive Media	150
Content for Computer Games[12]	< 25
Other Content Creation (Corporate, Commercials and Pop Promos)	< 25
Facilities	100
Publishing	150
Photo Imaging	100
Advertising	200
Total	**700**

NB: All totals are rounded to the nearest 50

In Northern Ireland, 10,900[13] people work in the Creative Media Industries and a further 1,100 are employed in Creative Media occupations in other industries. Significantly, Skillset's 2009 Employment Census (which excludes Film Production freelancers, Publishing, Photo Imaging and Advertising) showed a significant increase in Creative Media employment in NI from 3,200 in 2006 to 6,300 in 2009.[14] This trend is broadly supported by data from the NI Department for Enterprise, Trade and Investment (DETI) Census, which has also shown increases in NI Creative Media Industries employment in recent years. In contrast, between 2006 and 2009, the UK has seen a decrease in employment in the sector.

A breakdown of employment by Creative Media sub-sector in NI is provided in Annex B, Table 5. Some key points about the region's workforce are provided below:

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[10] 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 (Content for Computer Games) and IDBR 2009 (Photo Imaging, Publishing and Advertising).

[11] Excludes Cinema Exhibition

[12] Based on Skillset 2010 Company Database which provides geographical information regarding 221 Content for Computer Games companies within the population as identified by NESTA (485).

[13] Skillset 2009 Employment Census (all creative sub-sectors excluding Film Production, Photo Imaging, Publishing and Advertising), secondary analysis of unit lists for 2009 feature film productions (80 minutes or longer) and Labour Force Survey, ONS July 2009 – June 2010. This figure is higher than that reported in official data sources (see Table 5 in Annex B which estimates a Creative Media workforce approaching 5,000 and the UK Employment and Skills Almanac 2010 estimate of 7,500). As outlined in Annex B this is due to the categorisation of Interactive Media, Content for Computer Games and Facilities within broader classifications that also include activity outside of Creative Media and the systematic exclusion of freelancers.

[14] Skillset (2006) Employment Census and Skillset (2009) Employment Census respectively

- **Film**: the UK is one of the three major Film Production Industries in the world, and attracts significant inward investment from overseas. While in Northern Ireland the Film industry is less mature than the UK industry, it is becoming of growing strategic importance and has potential spill-over impacts on the tourism sector. Around 350 people operating in the key sub-sector of Film Production live in Northern Ireland, of which the vast majority (around nine in ten) are freelance.[15] This figure is higher than the number of employee jobs in SIC 92.11 and 92.12 (motion picture and video production and video distribution) in the 2007 DETI Census of Employment (250). It should however be said that at any point in the year, employment in Film Production may be higher than this due to the regular use of non-local cast and crew.[16]

- **TV**: approximately 1,650 people work in the Television industry in Northern Ireland[17] which includes Terrestrial Broadcast, Cable and Satellite and Independent Production. The sector includes the BBC and UTV. Three in ten (29%) of the workforce are freelancers.[18] Though the sector has experienced strong recent growth, Northern Ireland is still significantly under represented in terms of TV network production – in 2006, the investment in network production across all five terrestrial channels was lowest in Northern Ireland at less than £4 per capita compared to a UK-wide figure of £32.[19] However according to Network Supply Review targets for NI, provided by the BBC, these figures show that investment in network production is set to increase significantly from a total expenditure of £6.3m in 2009/10 to £17.1m in 2011/12. The most significant increase in expenditure over the period 2009/10 to 2011/12 is on commissioned drama productions (increase of £3.4m). Other genres of increased expenditure include commissioned entertainment and factual productions and by 2016 the BBC aims to spend, on an annual basis, 3% of its network budget on productions based in Northern Ireland (on the basis that NI represents 3% of the UK's population).

- **Radio**: 2,050[20] people work in publicly funded, commercial, community and voluntary radio. Northern Ireland's radio enterprises range from very large corporations such as the BBC to small, not-for-profit community radio stations.

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[15] Skillset (2009) Employment Census and secondary analysis of unit lists for 2009 feature film productions (80 minutes or longer)

[16] Skillset (2009) Employment Census

[17] Ibid

[18] Ibid

[19] Skillset website: www.skillset.org/uk/ni/industry/article_6530_1.asp

[20] Skillset (2009) Employment Census

Combined employment in TV and Radio (3,700) appears high compared to the number of employee jobs and self-employed in SIC 92.2 – Radio and Television activities – in the 2007 DETI Census of Employment (1,450). Much of the difference can be explained by official statistics not capturing freelancers and in Northern Ireland's case the large number of volunteers working in Community Radio.

- **Publishing**: 1,200 people work in the Publishing sector in Northern Ireland[21], predominantly from the newspaper sector where there were some 51 publications, located throughout the province. Figures suggest a significant decrease in the size of the workforce from 4,000[22] in 2006 and 2,250[23] in 2007.

  This dramatic decline in employment is a consequence of pressures brought about by the reduction, in common with the rest of the UK, in advertising revenue in local newspapers; and also by the growth of alternative sources of information, the internet in particular, for younger consumers. The challenge facing local and regional newspapers here in Northern Ireland is to find new, viable business models which allow them to develop an on-line presence in addition to their print product. However, a strength going forward for the industry is that journalism in the Province is considered to be well-developed in terms of supporting infrastructure: the University of Ulster, for example, was the first full multimedia MA course to gain dual accreditation from the Broadcast Journalism Training Centre (BJTC) and the National Council for the Training of Journalists (NCTJ). Elsewhere in Publishing, NI has also traditionally had a notable cottage book publishing industry, including companies such as Blackstaff Press, Guildhall Press and Appletree Publishing. Both books and magazines are now often published from the Republic of Ireland. E-publishing has been identified as a growing trend the industry can take advantage of in Northern Ireland.

<u>Occupations</u>

The Creative Media Industries are reliant on a wide range of occupations from creative and technical such as construction, set crafts, Interactive Media and visual effects, through to management and business roles, all of which benefit from applied Creative Media specific knowledge. This diversity of occupations means that skill needs throughout the industry also vary.

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[21] Labour Force Survey, ONS July 2009 – June 2010

[22] Labour Force Survey, ONS 2005-2007

[23] DETI (2007) Census of Employment

Table 2 below provides a full breakdown of employment by occupation. Comparing the NI data with that for the UK as a whole, it is apparent that the NI Creative Media Industries have a higher share of employment in art and design, strategic management and particularly broadcast management, and a lower share of employment in retail and exhibition.

Table 2: Occupational Breakdown in NI Creative Media Industries

Occupational Group	NI total	UK total
Creative Media (excluding Publishing and Advertising)		
Strategic Management	11%	5%
Creative Development	4%	2%
Production	9%	11%
Legal	1%	1%
Broadcast Management	18%	3%
Broadcast Engineering & Transmission	2%	2%
Editorial, Journalism and Sport	4%	5%
Content Development	2%	1%
Art and Design	13%	9%
Animators	1%	3%
Costume/Wardrobe	1%	1%
Make Up & Hairdressing	*	1%
Camera/Photography	8%	10%
Lighting	*	2%
Audio/Sound/Music	3%	3%
Transport	*	*
Studio Operations	*	*
Technical Development	2%	3%
Editing	3%	2%
Laboratories and Imaging Services	1%	5%
Manufacture	*	1%
Servicing	0%	1%
Retail and Exhibition	3%	10%
Libraries and Archives	*	2%
Distribution, Sales and Marketing	1%	2%
Business Management	9%	13%
Other	*	2%

Occupational Group	UK total
Publishing	
Managers and Senior Officials	28%
Professional occupations	4%
Associate Professional and Technical	40%
Administrative and Secretarial	11%
Skilled Trades Occupations	3%
Personal Service Occupations	0%
Sales and Customer Service Occupations	5%
Process Plant and Machine Operatives	2%
Elementary Occupations	6%

Sources: Creative Media - Skillset (2009) Employment Census, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2008) Photo Imaging Workforce Survey reported in reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Publishing - LFS, ONS July 2009 – June 2010, and due to data restrictions cannot be disaggregated further.
NB: Sample size in NI may exaggerate differences in occupation structure.

Creativity combined with entrepreneurialism is recognised as an important driver of innovation – the so-called 'diagonal thinking' that is increasingly required from the Creative Media workforce. According to the Technology Strategy Board the Creative Sector, with Digital Creative Media Industries at the heart of this sector, is an important stimulator of innovation in the wider economy, via firms they can work with as partners and/or suppliers.[24] The new innovation centres announced recently by the UK Government will almost certainly be helpful to the Creative Media Industries as a whole.[25]

In addition the digital future relies heavily on the Creative Media Industries and its capacity to generate compelling educational, entertainment, commercial and public service content and services which can engage citizens, learners and consumers around the world. Finding ways to innovate, within education, the existing workforce and industry is critical. The answer to which lies in collaboration between creative and technical drivers of the digital work to research, develop and prototype whilst equipping the workforce of the future and the workforce of today with the right skills to innovate, create and communicate in a digital environment.

It is also worth noting that the Department of Culture, Arts, and Leisure (DCAL) secured £5 million from the £90 million Northern Ireland Innovation Fund for the establishment of the Creative Industries Innovation Fund (CIIF), which was administered on its behalf by the Arts Council of Northern Ireland (ACNI). The CIIF operated on a rolling basis of which the first round, targeted at sectoral bodies, was implemented in December 2008. The second and subsequent rounds (April 2009 and October 2009) were targeted towards emerging creative businesses. Now, however, the ACNI has announced severe cutbacks in its budget and has indicated that the CIIF will be discontinued.

2.2 Product Market Structure

The core business of the Creative Media Industries is to create high quality and professionally produced content across the full range of platforms from mobile phones to computer games to film and TV screens. In most sectors of the industry, there are businesses whose exclusive domain is content creation, others which provide a supporting role in that process, and others involved in the distribution, transmission or exhibition of that content. This can be illustrated by reference to the Film industry which comprises not only production companies, but significant numbers of businesses in the

[24] Work Foundation (2009) Investing in the Creative Industries; A Guide for Local Authorities Includes software and reproduction of computer media.

[25] www.number10.gov.uk/news/speeches-and-transcripts/2010/10/creating-a-new-economic-dynamism-56115

Facilities sector who provide services such as Studio and Equipment Hire or Post Production, and also companies involved in distributing and exhibiting films.

Sectors differ however in terms of the supply chain through which content is created: for example in Television, much production is now commissioned by a small number of broadcasters and undertaken externally in the Independent Production sector. In other sectors, in-house production remains the prevailing model. In some sectors, all content produced is for public consumption (such as Broadcast, Film, Animation, Commercials and Content for Computer Games), in others it is primarily or exclusively for business (such as Corporate Production) while sectors such as Interactive Media and Publishing produce and disseminate content to both people and businesses.

Increasingly the linear value chain and specific supply relationship in place within the sub-sectors is being supplemented by an opportunity for the 'content creators' to apply their content to a variety of platforms and distribution channels. 'Interactive or digital media companies' are, from the outset, creating content for multiple use and not for example with a primary use and then to be 'adapted' for on-line purposes. Growing opportunities are seeing a new type of company and dynamic business model becoming the norm.

2.3 Employment Profile

In Northern Ireland, overall, 48%[26] of those working or available for work in the Creative Media Industries are 'freelance' and the remaining 52% operate on an 'employee'[27] basis. This is a significantly higher proportion than the 25% of freelancers across the UK as a whole.[28] However, the UK figure also includes Publishing and Advertising, which have comparatively low levels of freelancing (13% and 20% respectively). It may also be related to the critical mass of the industry in NI, which means that there are fewer permanent employee positions. Amongst employees in the UK's Creative Media Industries, four fifths are employed on a full time basis and one fifth part time.[29]

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[26] Skillset (2009) Employment Census, secondary analysis of unit lists for 2009 feature film productions (80 minutes or longer). NI average excludes Photo Imaging, Publishing and Advertising due to a low sample size in Labour Force Survey.

[27] 'freelance' = contract of less than 365 days and 'employee'=contract of 365 days or more.

[28] Skillset (2009) Employment Census, secondary analysis of unit lists for 2009 feature film productions (80 minutes or longer) and LFS, ONS July 2009 – June 2010.

[29] LFS 2009 as reported in the UK Employment and Skills Almanac 2010. As outlined in Annex B these figures exclude many of those working in Interactive Media, Content for Computer Games, Facilities and freelancers.

Table 3 below shows that many sub-sectors of the Creative Media Industries in NI are characterised by high levels of freelancing, especially Film Production (91%) and Radio (78%).[30]

Table 3: Proportion of Workforce who are Freelance by Sub-Sector

Sector	% freelance, NI	% freelance, UK
Television	**29**	**28**
Broadcast Terrestrial	12	19
Cable & Satellite Television	-	11
Independent Production (TV)	36	44
Radio	**78**	**23**
Broadcast Radio	78	22
Independent Production (Radio)	-	61
Animation	**17**	**46**
Interactive Media	**36**	**21**
Content for Computer Games	*	**4**
Other Content Creation	*	**47**
Commercials Production and Pop Promos	*	41
Corporate Production	*	54
Advertising	**N/A**	**20**
Facilities	**30**	**29**
Film Production	**91**	**89**
Publishing	**N/A**	**13**
Book publishing	N/A	21
Newspaper publishing	N/A	5
Journals & periodicals	N/A	15
Other publishing	N/A	17
News Agencies	N/A	8
Publishing of Directories & Mailing Lists	N/A	11
Other info service activities n.e.c.	N/A	16
Photo Imaging	**N/A**	**67**
Photographic activity	N/A	67
Archives & Libraries	**N/A**	**17**
Total	**48**	**25**

Source: Skillset (2009) Employment Census, secondary analysis of unit lists for 2009 feature film productions (80 minutes or longer) and LFS, ONS July 2009 – June 2010.

Overall, 44% of employers in the Creative Media Industries in Northern Ireland reported using freelancers; this is significantly lower than the 47% of Creative Media employers across the UK.[31]

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[30] Skillset (2009) Employment Census and Skillset/UK Film Council (2008) Feature Film Production Workforce Survey.

[31] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

Changes in employer demand for freelancers over the past year were also explored in Skillset's (2010) Creative Media Employer Survey and show an increasing usage of freelancers in Northern Ireland. Approaching half (45%) of employers in NI stated that their company's requirement for freelancers had *increased* over the last 12 months. A further 33% said that their need had not changed in the past 12 months and 19% said that their need had *decreased*. Employers in Northern Ireland were more likely than those in other Nations to have experienced an increase in demand (21% in Wales, 30% in England and 37% in Scotland).[32]

In addition, 36% of Creative Media employers in Northern Ireland believed their company's requirement for freelancers would *increase* over the next 12 months, 47% believed it would *stay the same* and 12% thought it would *decrease.* Employers in NI were again more likely than those in other Nations to foresee an increase in demand (23% in England, 26% in Scotland and 29% in Wales).[33]

Over half (54%)[34] of the Creative Media workforce in NI use their skills across multiple sectors which is unsurprising due to the converging media industry, high share of freelance employment and lack of critical mass.

As with the freelancing data, there is significant divergence between figures for NI and the UK across individual sub-sectors. This is likely to reflect a genuine increased likelihood of cross-sector working and a need for significant flexibility to survive in the freelance-intense NI Creative Media sector.

In spite of some variation at sub-sector level, the typical workforce profile across the industries, in both NI and the UK as a whole, is white, male, young and highly qualified:

- Representation of women is much lower in NI Creative Media than across the economy as a whole (22%[35] compared with over 47% across Northern Ireland[36]) and varies considerably by sector with a third or more in Film Production (39%) and Radio (33%).[37] Research has also shown that female representation is falling (from 34% in

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[32] Ibid

[33] Ibid

[34] Skillset (2008) Creative Media Workforce Survey (excludes Film Production, Publishing, Photo Imaging and Advertising).

[35] Skillset (2009) Employment Census, Skillset /UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Excludes Publishing and Advertising due to low sample sizes in NI in Labour Force Survey.

[36] LFS, ONS July 2009 – June 2010

[37] Skillset (2009) Employment Census and Skillset/UK Film Council (2008) Feature Film Production Workforce Survey.

2006)[38] whereas the opposite is the case for the economy as a whole.[39] The NI figure of 22% for female participation compares unfavourably with those for England (39%), Scotland (33%) and Wales (29%). Within the Creative Media workforce across the UK the average is 38%.[40]

- Research has also repeatedly shown that representation of older women is extremely low and has identified the cause of this to be the particular challenges of balancing starting and raising a family with working in the Creative Media Industries, for example due to long and unpredictable hours.[41]

- Just 1% of the NI Creative Media Industries workforce are from a Black, Asian or Minority Ethnic Background (BAME) (1%).[42] This compares to 2% across the wider Northern Irish economy[43] and 7% across the UK Creative Media workforce;[44]

- Fewer than one in ten (8%) in the NI Creative Media Industries workforce is disabled.[45] This is slightly higher than the 5% of those employed across the wider economy in NI that are disabled.[46]

- The NI Creative Media Industries workforce is young and around two fifths (39%[47], compared to 38% across the UK[48]) are under 35 years of age. Differences are

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[38] Skillset (2006) Employment Census. Figures exclude Film Production freelancers, Publishing, Photo Imaging and Advertising.

[39] LFS, ONS July 2009 – June 2010

[40] Skillset (2009) Employment Census, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey, LFS July 2009 – June 2010. This figure comprises the whole of the Creative Media Industries and is preferred to using LFS data alone due to the exclusion of many of those working in Interactive Media, Content for Computer Games, Facilities and freelancers (without these sectors women make up 42% of the workforce as reported in the UK Employment and Skills Almanac 2010).

[41] Skillset (2006) Balancing Children and Work in the Creative Media Industries

[42] Skillset (2009) Employment Census, Skillset /UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Excludes Publishing and Advertising due to low sample sizes in NI in Labour Force Survey.

[43] LFS, ONS July 2009 – June 2010

[44] Skillset (2009) Employment Census, Skillset /UK Film Council (2008) Feature Film Production Workforce Survey and LFS July 2009 – June 2010. This figure comprises the whole of the Creative Media Industries and is preferred to using LFS data alone due to the exclusion of many of those working in Interactive Media, Content for Computer Games, Facilities and freelancers (without these sectors BAMEs make up 8% of the workforce as reported in the UK Employment and Skills Almanac 2010).

[45] DDA Disabled only - Skillset (2008) Creative Media Workforce Survey, Skillset /UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Excludes Publishing and Advertising due to low sample sizes in NI in Labour Force Survey.

[46] LFS, ONS July 2009 – June 2010

[47] Skillset (2008) Creative Media Workforce Survey, Skillset /UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Excludes Publishing and Advertising due to low sample sizes in NI in Labour Force Survey.

evident by contract type; 33% of NI employees compared with 46% of freelancers are under 35 years old.

- Creative Media is highly skilled and one of the most highly qualified sectors in the economy; 69% of the NI Creative Media Industries workforce have a degree or equivalent level 4 qualification[49] compared with just 33% of the population of working age across the NI economy.[50] Freelancers in particular tend to have degrees (74% compared with 64% of employees).[51] Across the UK Creative Media workforce, 60% have a graduate/level 4 degree.[52]

- The average income within the Creative Media Industries workforce in NI is £30,550, compared to £32,300 across the UK (varying from over £37,000 in Terrestrial TV and Computer Games down to £12,400 in Cinema Exhibition).[53] Within the Creative Media sector the average earned by employees is significantly higher than that earned by freelancers across the UK - £33,300 compared with £29,450.[54] For the tax year ending 5 April 2010 the median gross annual earnings for full-time employees across the UK economy were lower than the Creative Media Industries at £25,900.[55] This is unsurprising given the high proportion of graduates in the Creative Media Industries.

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[48] Skillset (2008) Creative Media Workforce Survey, Skillset /UK Film Council (2008) Feature Film Production Workforce Survey and LFS July 2009 – June 2010. This figure comprises the whole of the Creative Media Industries and is preferred to using LFS data alone due to the exclusion of many of those working in Interactive Media, Content for Computer Games, Facilities and freelancers (without these sectors 38% of the workforce are aged under 35 years as reported in the UK Employment and Skills Almanac 2010, which is the same as the broader figure presented).

[49] Skillset (2008) Creative Media Workforce Survey, Skillset /UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Excludes Publishing and Advertising due to low sample sizes in NI in Labour Force Survey.

[50] LFS, ONS July 2009 – June 2010

[51] Skillset (2008) Creative Media Workforce Survey, Skillset /UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Excludes Publishing and Advertising due to low sample sizes in NI in Labour Force Survey.

[52] Skillset (2008) Creative Media Workforce Survey, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey and LFS Jul 2009 - Jun 2010. This figure is preferred to using LFS data alone due to the exclusion of many of those working in Interactive Media, Content for Computer Games, Facilities and freelancers (without these sectors 56% of the workforce have a degree or equivalent level 4 qualification as reported in the UK Employment and Skills Almanac 2010).

[53] Skillset (2008) Creative Media Workforce Survey. Excludes Photo Imaging, Publishing, Film Production and Advertising.

[54] Ibid

[55] Annual Survey of Hours and Earnings, ONS (2010)

2.4 Recruitment at Entry Level Onwards

Two fifths (38%) of Creative Media employers in Northern Ireland have taken on new employees or short-term contracted staff over the past 12 months (lower than the proportion of Creative Media employers across the UK – 46%). Again highlighting the importance of freelancers, over three quarters (77%) stated that this recruitment involved taking on freelancers, with 22% taking on employees and just 2% taking on both.[56]

Of those employers in NI to have recruited in the last 12 months, a fifth (22%) recruited from other Creative Media Industries and nearly half (48%) recruited from outside of the Industries. This gap is even more polarised than amongst all Creative Media employers across the UK, where 28% recruited from other Creative Media Industries compared to 41% who recruited from outside of the Industries.[57]

Seven in ten (70%) Creative Media employers in NI have recruited direct from education in the last 12 months, which is the highest of all nations within the UK (an average of 45% across the UK).[58]

Most sectors of the industry have long been characterised by an oversupply of potential new entrants keen to enter an area commonly seen as glamorous and exciting. It is estimated that in 2008-09 around 720,000 learners in FE were studying courses relevant to Skillset industries (from here on referred to as 'Skillset relevant courses'[59]), whilst over 757,000 were studying Skillset relevant courses at UK HE institutions.[60] In terms of outcomes, 10% of all Skillset relevant students who have gained employment 6 months after graduating have done so within Skillset industries.[61] It should nevertheless be noted that Skillset Relevant students make up over half (51%) of all the students to be subsequently employed in a Skillset industry, indicating that Skillset Relevant students

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[56] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

[57] Ibid

[58] Ibid

[59] Skillset-relevant courses are those defined through course codes within the HESA Joint Academic Coding system (JACs) and FE 'learning aims' as potentially relevant to Skillset key sectors and the functions and occupations within them.

[60] Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Learning and development Provision in FE, HE, and the Private Sector in the UK. NB These figures include Fashion & Textiles which is not in the scope of this SSA. Further information regarding this study can be found in the methodology section.

[61] Since 2002/03 HESA have administered a survey of HE leavers called the Destinations of Leavers from Higher Education (DLHE). This replaced the previous First Destinations Supplement (FDS) and seeks to collect a richer set of data then held previously particularly focused upon on the employment and further study graduates move in to after their studies.

are more likely to find employment in Skillset industries than those studying non-Skillset Relevant courses.[62]

One result of this oversupply has been a high level of voluntary or unpaid working undertaken in order to get a foot in the door and a first paid job: more than two fifths (46%) of the NI Creative Media Industries workforce had undertaken unpaid work in order to get into the industry – a similar proportion to the UK average.[63] Advertising is the most common recruitment method for those entering the industry, with 37% entering this way and 22% entering via word-of-mouth or personal contact.[64] Interestingly, this is the reverse of the pattern seen across the wider UK Creative Media Industries, in which personal contacts are the source of initial entry for a majority of workers. It is probable that Equal Opportunities legislation in Northern Ireland is responsible for this reverse. This legislation was designed to eradicate traditional sectarian practices by a range of employers in the Province and now requires them to commit openly to recruitment policies which demonstrate equal opportunity for all. Whilst it is true that word-of-mouth opportunities still regularly arise (e.g. in recruitment of researchers on short-term contracts by Independent Television Production companies) many more job opportunities are advertised widely to comply with the need for fair competition.

Lack of information on the range of occupational roles also complicates the picture and employers report that the '*X-Factor* generation' have little knowledge about wanting to work in the Creative Media sector and less about how to enter. This results in an oversupply in most general Creative Media roles but skills shortages in more specialist technical areas like Broadcast Technology and Engineering and the more craft-orientated occupations.

Northern Ireland based employers reported that skills shortages mainly exist in occupations like Technical Development and Production.[65] A lack of information on the range of occupational roles may be a contributing factor. Across the Creative Media Industries in NI, employers report that skills in short supply from new entrants include sales and marketing skills (68% of employers), creative talent (60%), using software

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[62] DLHE Survey, HESA 2007/08 from Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Learning and development Provision in FE, HE, and the Private Sector in the UK.

[63] Skillset (2008) Creative Media Workforce Survey. Figures exclude Film Production, Photo Imaging, Publishing and Advertising.

[64] Ibid

[65] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

packages such as Photoshop, Avid and Final Cut Pro (57%), leadership and management (56%) and multi-skilling (52%).[66]

Lack of information getting to new entrants coupled with informal entry routes and high qualification entry bars are resulting in serious representational issues (socio-economic and gender).

2.5 Retention

The oversupply of people wanting to enter the industry has also had implications for retention as well as recruitment: as already noted, people who choose to start a family commonly find it difficult to combine this with a career in the Creative Media Industries and the problem appears more acute for women.[67] It is also possible that the perception of ease of replacement overlooks the value of the skills and experience gained by people leaving the industry typically in their thirties and forties; the industry thus routinely and avoidably loses a highly skilled segment of its workforce to other sectors of the UK economy.

A further specific factor is that of the geographical location of Northern Ireland, separated from the rest of the United Kingdom by the Irish Sea. Interestingly, this has the effect of facilitating retention, especially by the larger employers such as BBC NI. Here, the career pyramid sharpens very quickly with fewer opportunities for advancement to senior level. This means that employees have to choose between sitting in the same job for a much longer time or moving across the Irish Sea (with all the implications for family disruption – new schools, etc.) to gain advancement. Unsurprisingly, many choose not to move. Of course, if one works for the BBC in London or Manchester, for example, it’s possible to climb the career ladder without having to move house; but in Northern Ireland, this lack of opportunity, and movement, adds to the problems of people trying to gain employment or find the next rung on the career ladder. In the qualitative phase of Skillset’s research conducted in October 2010 some expressed a serious concern that the lack of career mobility can lead to stagnation and a lack of energy to develop new ideas and innovate.[68]

This situation is exacerbated by freelancing and ensuring freelancers have skill currency and are agile (available) at times of work fluctuation, an issue for those sectors where this freelance pool is a significant part of the workforce. It should be stressed that sole traders

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[66] Ibid

[67] Skillset (2006) Balancing Children and Work in the Audio Visual Industries.

[68] Focus group with Northern Ireland employers and stakeholders undertaken in October 2010 as part of Skillset’s employer and stakeholder qualitative framework 2010.

and freelancers are associated with lower levels of learning and development compared to the permanent workforce (in Northern Ireland 34% and 55% respectively had received learning or development in the past 12 months[69], whilst 41% of employers provide learning and development for employees but 24% of these employers do not make the learning and development they provide available to freelancers[70]). Added to this, as noted earlier from recent Skillset research[71], is that women and BAMEs are less well represented in some sectors of the industry. Further implications of the recession on the make up of the industry will be captured in Skillset's 2010 Creative Media Workforce Survey and Skillset's 2011 Employment Census.

Some of these people have or could end up leaving the sector at this crucial time, taking their experience and talent with them. The risks these factors pose need to be addressed to sustain the vitality of this strategically important sector.

2.6 The Economic Situation

The Creative Media sector as a whole in Northern Ireland is confident about future growth prospects given the rise in global opportunities, the increased pace and diversity of digital content platforms and the return to growth of the Advertising industry. This does not mean that the reductions in public spending announced by the Coalition government on October 22nd 2010 in the Comprehensive Spending Review do not represent challenges for some public sector broadcasters such as the BBC. However opportunities are there to be taken. The Content for Computer Games and Facilities sectors are very buoyant with a major mini-series pilot commissioned by HBO of the United States currently underway and many other opportunities for growth identified.

In Creative Media, NI faces many of the same challenges as the rest of the UK – most notably keeping pace with rapid change in consumer preferences for 'consuming' creative output – but it is well placed to grow with a highly flexible base of small firms and freelancers and a significant BBC presence likely to gain from the Corporation's ongoing efforts to decentralise. Indeed, the region will hope to capture additional spin-off benefits from the relocation of several BBC departments to the North West in 2011.

Many indices point to growth in the medium term across the Creative Media sector, largely spurred by technological development; the National Endowment for Science,

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[69] Skillset (2008) Creative Media Workforce Survey, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Figures exclude Publishing and Advertising.

[70] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

[71] Skillset (2009) Employment Census

Technology and the Arts (NESTA) analysis for 2009-2013 points to growth as businesses take advantage of digital technologies to develop new business models. Indeed, historically, recessions have played a role in triggering new business start-ups.

The report by the House of Commons Northern Ireland Affairs Committee on Television Broadcasting in Northern Ireland is highly-critical of the UK network broadcasters, accusing them of 'culturally neglecting' the Province. But the report also highlights 'the success of Northern Ireland in securing international commissions… that over the past 18-24 months Northern Ireland had more hours of programming commissioned from international platforms that anywhere else in the UK'.[72]

To investigate the actual effects of the recession, Skillset's (2010) Creative Media Employer Survey asked employers whether their requirement for permanent employees had increased or decreased over the past 12 months. A fifth (22%) of employers in Northern Ireland said that their requirement had *decreased*, compared to 19% across the UK. One in ten (12%) employers in NI had actually experienced an *increase* but the majority (65%) had experienced no change.[73]

It might be expected that such changes in demand for permanent staff within the industry will have led to an increase in the pool of freelance workers. Skillset's research shows a high proportion of employers in NI (45%, compared to 30% across the UK) stated that their company's requirement for freelancers had *increased* over the last 12 months. A further 33% said that their need had not changed in the past 12 months and 19% said that their need had *decreased*.[74] Looking to the future this pattern looks set to continue, 36% of Creative Media employers in NI believed their company's requirement for freelancers would *increase* over the next 12 months, 47% believed it would *stay the same* and just 12% thought it would *decrease*.[75]

In terms of effects on learning and development, three in ten (28%) of Creative Media employers in Northern Ireland reduced their budget for learning and development over the last year, which is the highest of all nations and regions across the UK (12% on average). For 53% of employers in NI the budget remained unchanged, whilst just 11% have actually seen an increase in it.[76]

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[72] HC 237: Northern Ireland Affairs Committee: 'Television Broadcasting in Northern Ireland': 3rd Report of Session 2009-10: Published 26/01/10.

[73] Skillset (2010) Creative Media Employer Survey. Excludes Advertising.

[74] Ibid

[75] Ibid

[76] Ibid

Amongst the 58% of employers in NI stating that they couldn't provide more learning or development for staff for a particular reason, the most common reasons were that 'the company cannot afford to invest in learning and development' and that the company 'did not have enough time' for learning and development (both mentioned by 68% of employers).[77] Despite just three in ten employers having to reduce their learning and development budget there is clearly more that they would like to be able to do.

Positively, employers in NI experiencing a skills gap amongst their current workforce were unlikely to attribute this to the recession – just 2% linking the skills gap to 'the current economic climate/recession' (lower than the UK average of 6%).[78]

2.7 The Business Context

The business context for Northern Ireland is both challenging but optimistic. The Creative Media sector here as elsewhere in the UK is connected to a growing global marketplace in all forms of content that are digitally driven. Opportunities for Advertisers, Film companies, Television executives, Content for Computer Games producers, VFX, Animation, Publishers and others are considerable. The UK government are committed to upgrading the UK's digital capability with faster broadband connectivity and greater support for the Creative and Cultural industries as a whole, as part of the Coalition government's growth strategy.[79] Challenges remain however around the scale of the sector in Northern Ireland and the ability to generate revenues from digital content.

2.8 Opportunities and Challenges

In Northern Ireland the role of the Skillset Media Academy is of particular relevance in this regard. Since its inception, it has encouraged much greater interaction between key industry figures and organisations and the student body, with regular lectures and/or Q & A sessions, visits to studios, work placements and internships. It is now taking a leading role in developing a range of CPD training programmes which it hopes to offer to industry on a commercial basis within the next 2 years, taking account of the need to upskill and reskill the Province's workforce.

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[77] Ibid

[78] Ibid

[79] www.number10.gov.uk/news/speeches-and-transcripts/2010/10/creating-a-new-economic-dynamism-56115

2.8.1 Networking and Collaboration

As the processes of convergence progress, competitive boundaries will become increasingly blurred. The common feature of the global opportunities presented by new and developing technology is that they will be beyond the scope and scale of almost all single companies, even large established multinationals or conglomerates. Alliances and partnerships will therefore need to be formed for opportunities to be realised, commonly with companies in technology and telecoms, and sometimes with companies that will be competitors in other markets. Learning how to navigate through this increasingly complex competitive environment may well be a distinguishing feature of companies which survive through the increasingly competitive environment precipitated by the current economic downturn, and those which do not. It is felt that in Northern Ireland, both the extent and intensity of collaboration and networking between Creative Media firms could be improved, as achievement of the tangible benefits this can provide has to date been limited.

Emphasis has been placed on the need for greater collaboration between industry and education in NI given the historical lack of engagement between the two. Incidentally recent evidence reveals that four in ten (42%) employers in Northern Ireland do not value formal qualifications (50% across the UK, with huge variation by sub-sector from 63% in 'Other Photo Imaging' to 27% in TV Broadcasting).[80] However it was felt that in order for this working partnership to be effective, both industry and education would have to gain from this process and that the benefits could not be one-sided e.g. industry could offer more student placements. To a certain extent this is true however the counter argument is that education is publicly funded and so does not necessarily need to get an equal deal when collaborating with industry.

2.8.2 The 'Credibility' Challenge Facing NI Practitioners

Something of a paradox facing the Creative Media sector in Northern Ireland – as in many northern English regions – is that to establish credibility and a reputation, individual employees and firms must frequently secure experience working on projects in the traditional Creative Media clusters of southern England, particularly London. Even if the actual work undertaken – whether creative or technical in nature – is extremely similar, projects outside London may carry less weight on a CV and therefore make it harder for a firm or a freelancer to develop their business successfully at home.

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[80] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

A related issue is of course the natural 'talent drain' whereby young workers showing promise will often follow the better career prospects (and remuneration) available by moving to London. Examples of NI-born talent employed on-screen in the Creative Media Industries include Christine Bleakely (Daybreak), Colin Murray (BBC), Zoe Salmon (formerly Blue Peter) and Eamon Holmes (This Morning).

The challenge facing NI and other northern UK regions is therefore twofold: firstly, to ensure more experienced professionals who may have left are able to return home to continue a successful career; and secondly, in the longer term, to develop a base of employers capable of attracting and retaining the best young talent. In the TV and Radio sectors, the relocation of BBC Sport, CBBC and Radio Five Live to the North West of England in 2011 should help address the traditional problem of London-centricity.

2.8.3 Convergence and Audience Fragmentation

According to figures from PwC[81] over the next four years to 2014 Internet Advertising will grow by 10.5% and advertising in video games will grow by 13.7%. This compares with 4.3% for TV advertising and reductions of 1.2% for Newspapers, 11.9% for Print Directories and 1.3% for Trade magazines.

Audience fragmentation is driving growth in demand – in the last ten years, for example, cable and satellite subscription revenue has tripled, while DVD revenues have increased fifteen-fold and downloading has enabled audiences to access content in more personalised ways.[82] Consumption of video across multiple platforms is now a global phenomenon, with approximately 70% of global online customers now watching online video, but with North America and Europeans lagging in adoption.[83] As a consequence, user autonomy over access is the new gold standard for Creative Media organisations. Indeed beyond access the drive for more local television for example is enabling user-generated content in a medium hitherto the preserve of professionals. Local TV will measure demand for communities to produce content and also provide a huge demand for basic TV skills.

The same issue faces the Publishing industry in NI to the extent that it is threatening the survival of some of the Province's smaller Publishing companies. There are serious question marks over the sustainability of some NI local newspapers given the large number of them and their relatively small readership. In the past this situation was

[81] Towards 2014, the search for value in the digital supply chain PwC 2010

[82] Media Predictions, TMT Trends, Deloitte 2009.

[83] How People Watch: A Global Neilson Consumer Report – August 2010

exacerbated by the Province's unique complicating factor involving the role of politics and the ongoing religious divide. This was particularly apparent in the Publishing industry with unionist versus nationalist newspapers, both of which had loyal readerships. Most newspapers were founded on this basis but, in recent years, the political and religious divide has become less pronounced as papers have transformed from parochial news sheets and have embraced modern colour printing and digital technologies. The Tyrone Courier is one example. In the last decade it has doubled its circulation by widening its editorial coverage to both communities and by concentrating on less contentious areas such as sport.

Thus, unlike many sectors of the economy, the current challenge for those in most sectors of the Creative Media Industries is less about the scale of demand, but its complexion and the ways in which it can be met. In particular, recent years have witnessed fragmentation of markets on a huge scale, meaning that broadcasters and publishers in particular have for some time had to rethink their business models radically. It has long been clear that the traditional media paradigm of broadcasters and publishers providing advertisers with direct or exclusive access to mass markets and relying solely on that revenue source has gone for good. The huge decline in advertising revenue has presented many employers in the sector with profound business challenges long before the rest of the economy began its slide towards recession. As previously mentioned (page 12 – Publishing), this has been particularly true for the Publishing industry in Northern Ireland which is suffering a significant reduction in newspaper employment levels.[84] And the challenge for Ulster Television (the Province's independent commercial broadcaster) is to judge whether or not reducing local programme output would further affect already-shrinking revenue from local advertisers.

2.8.4 Lower Cost Technology and User-Led Innovation and Content

User-led innovation has become increasingly important and several of the UK's existing creative businesses such as web content and video games have been cited as examples of excellence.[85] This includes User Generated Content (UGC) through, for example Twitter and other social media sites and blogs. In the US, UGC site visitors are projected

[84] LFS, ONS Jul 2009 – Jun 2010

[85] NESTA (2009) Annual Review.

to grow from 69 million in 2006 to 101 million in 2011, with corresponding growth in advertising revenue from $1 billion in 2007 to $3.3 billion in 2008.[86]

2.8.5 Intellectual Property and Digital Management

A mass of niche services has been created and with these opportunities come new challenges – peer sharing and privacy for example – challenging content creators' ability to earn from their own intellectual property at a time when budgets have been squeezed. With format export fees partially replacing lost advertising revenue, the potential for intellectual property theft has been greatly heightened and poses a serious threat to many content producers.

In summary, although the changing landscape is a challenge it also represents a significant opportunity. The Creative Media Industries are seen as an important sector in driving the recovery of the economy. Additionally, both the UK Government and the devolved national governments see skills as the key element in increasing both personal and national productivity.

[86] 'User Generated Content, Social Media and Advertising', IPA, April 2008.

3 Current Skills Needs

3.1 Overview

It was clear from the qualitative phase of research conducted by Skillset Northern Ireland in October 2010 that Sales, Marketing, Accountancy and other business skills, technical Skills including Programming Languages, Design Skills for animation and web, Infrastructure Management, skills relating to building Games, User Interface Design, and programming are all skills gaps and areas of skills shortage.[87] The key problem is being able to build and retain skills in Northern Ireland. Perhaps the greatest single movement in skills requirements in the Creative Media Industries has been due to advances in digital technology, transforming the ways in which content is produced, aggregated and distributed. New platforms require not only new technical skills, but also the development of new business models, flexible and adaptive management and visionary creative leadership. Traditional production processes are being questioned, and new techniques rapidly move from "cutting edge" to industry standard. Although the importance of learning the skills to use technology cannot be overstated, the benefits of a fully digital workflow will only impact when production staff embrace and adapt to the collaborative working enabled by new techniques.

This rapid development in technology is of course shaping consumer preferences for media content consumption and in turn the skills demands of the industry. An increasingly important feature of the Creative Media sector is that individual workers must often be able to demonstrate a portfolio of skills that were once specific to a particular sub-sector. The ability to combine both creativity and entrepreneurialism in order to monetise digital content is becoming the major challenge for the Creative Media workforce. Leadership and management adaptability and flexibility is thus critical to release the innovative potential of each and every member of the workforce.

One in two members of the Creative Media workforce declared a current need for learning and development (54%)[88] – a similar proportion to the UK as a whole.[89] Approaching half (45%) had undertaken learning and development in the previous year,

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[87] Focus group with Northern Ireland employers and stakeholders undertaken in October 2010 as part of Skillset's employer and stakeholder qualitative framework 2010.

[88] Skillset (2008) Creative Media Workforce Survey, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Figures exclude Publishing and Advertising.

[89] This figure corresponds with data from the National Employer Skills Survey 2007 (England) which shows that 59% of staff had received training in the past 12 months. However, this data excludes many of those working in Interactive Media, Content for Computer Games and Facilities.

receiving an average of 9 days each (an increase from 6 days in 2005); however, when set in the context of the UK figures of 55% and 11 days respectively,[90] NI's oft-quoted economy-wide 'learning and development deficit' once again seems apparent.[91] Comparing NI employees with freelancers, the latter were more likely to claim to need learning or development (57% v. 51%).[92]

Despite employee and freelance demand for learning and development being high the latest evidence suggests that employer's provision to meet the demand is perhaps not at the same level. In Skillset's (2010) Creative Media Employer Survey, just 24% of Creative Media employers in Northern Ireland have a plan that specifies the type and level of learning and development that their company will invest in over the coming year (this is higher than the 18% across Creative Media employers in the whole of the UK). In terms of budget, 28% of Creative Media employers in NI had to reduce their budget for learning and development over the last year, which is much higher than Creative Media employers across the UK (12%). For 53% of employers the budget remained unchanged, whilst just 11% have actually seen an increase in it.[93]

Over the last 12 months two fifths (41%) of employers have funded or arranged any learning or development for their workforce (compared to 45% across the UK). Unfortunately, of those employers who do provide learning or development, 24% do not extend provision to freelancers.[94]

Within those companies in NI that had funded or arranged learning and development for staff in the past 12 months the most common method of delivery was through an external course or seminar (65%). More than half of employers funded or arranged learning and development delivered through both non-structured and structured support on the job by another member of their workforce (58% and 55% respectively), books and other printed materials (54%) and internal courses conducted by another member of staff (53%). Interestingly, just 35% of employers had funded or arranged learning and development delivered through internet based/online resources.[95] Indeed from the qualitative phase of

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[90] Skillset (2008) Creative Media Workforce Survey, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Figures exclude Publishing and Advertising.

[91] For example, see the Oxford Economics reports "Economic impact of migrant workers in NI" (2009) and "Skills demand forecasting in NI" (2008), published by the Department for Employment and Learning.

[92] Skillset (2008) Creative Media Workforce Survey, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Figures exclude Publishing and Advertising.

[93] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

[94] Ibid

[95] Ibid

research it was clear that many in the Creative Media sector are self-taught relying on e sources of learning and development and that there is a latent demand for more accessible and better quality e-learning provision.[96]

A large proportion of roles in all sectors are industry-specific and often highly specialised. Many roles are esoteric and require up-to-date skills with particular machinery or software. There is thus a very wide range of skill areas within the sector, and often a small labour pool from which to recruit into many of those areas. This can mean that in spite of the oversupply of potential new entrants to the industry, serious gaps and shortages can and do occur in particular areas.

Some of the skills issues that have arisen as a result of the above factors are described below.

3.2 Skills Shortages

Across the Creative Media Industries in Northern Ireland, employers report that skills in short supply from new entrants include sales and marketing skills (68% of employers), creative talent (60%), and using software packages such as Photoshop, Avid and Final Cut Pro (57%), leadership and management (56%) and multi-skilling (52%).[97]

Employers also highlighted a mismatch of applicants' skills to the needs of the job and tended to prioritise experience in work over academic qualifications.[98] In fact, recent evidence reveals that half of employers state they do not value formal qualifications.[99] This might be attributable to a perception among employers that qualifications do not necessarily make new recruits to the sector 'job ready'.

Skillset's (2010) Creative Media Employer Survey reports that 12% of employers in the Creative Media Industries in NI have current vacancies. Of these employers, 57% reported vacancies that are hard to fill (the highest of all UK Nations - 46% across the UK). This equates to 7% of all Creative Media employers in NI.[100] These hard to fill

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[96] Focus group with Northern Ireland employers and stakeholders undertaken in October 2010 as part of Skillset's employer and stakeholder qualitative framework 2010.

[97] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

[98] Skillset's employer and stakeholder qualitative framework 2010

[99] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising. 50% of employers reported that they do not value formal qualifications.

[100] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising. These figures are preferred to using official data sources due to the exclusion of many employers working in Interactive Media, Content for Computer Games and Facilities. In addition the data available from Skillset's research programme is more recent. The Northern Ireland Skills Monitoring Survey 2005 reported that 11% of Creative Media employers

vacancies were most frequently based in occupations like Technical Development and Production. The majority of employers in NI experiencing hard to fill vacancies went on to report that this was due to applicants lacking the relevant work experience or lacking the skills or talent the company demands. Few identified an applicant's lack of relevant qualifications as a reason.[101]

In response to these hard to fill vacancies employers in NI were most commonly using new recruitment methods or channels or recruiting from overseas.[102]

In the Creative Media Industries in NI, the most common areas of learning and development provided by employers in the past 12 months related to using software packages such as Photoshop, Avid and Final Cut Pro and technical skills – most frequently camera and computer programming and usage (both 38% of employers). Other common areas of learning and development provided include leadership and management (28%), sales and marketing (27%), and skills to develop content for multiple platforms (25%). In terms of developing content for multiple platforms the two areas cited most frequently were the 'design and development of web sites or web applications' and 'writing and editorial'.[103]

In common with other parts of the UK, most areas of the Creative Media Industries in Northern Ireland are characterised by an oversupply of potential new entrants. One result of this has been a high level of voluntary or unpaid working, for example nearly half (46%) of the Northern Ireland Creative Media workforce report having worked unpaid in order to get into the industry.[104] Another implication of excess supply is that the level of qualifications demanded, which acts as a signal if nothing else, rises, to the extent that many new entrants require graduate qualifications even if the most in-demand skills are practical / on-the-job orientated. Promotion within certain sectors is also said to be very much dependent on holding qualifications. The danger here is that any qualification below university level, no matter how relevant, may not even be considered. Mismatch of applicants' skills to the needs of the job is however a common issue, and experience in work is often a much greater priority than any specific qualifications.

Skillset's 2010 Creative Media Employer Survey investigated the usage of apprenticeships and graduate internships. A fifth (21%) of Creative Media employers in NI

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have vacancies (just over 100 vacancies in total). The survey also shows that 5% of establishments reported hard to fill vacancies, and 4% had hard to fill vacancies perceived to be due to skills shortages.

[101] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

[102] Ibid

[103] Ibid

[104] Skillset (2008) Creative Media Workforce Survey. Figures exclude Film Production, Photo Imaging, Publishing and Advertising.

offer apprenticeships and a further 46% would consider doing so in the future (higher than the UK average of 9% and 40% respectively).[105]

A fifth (23%) of Creative Media employers in NI also offer graduate internships and a further 45% would consider doing so in the future (once again higher than the UK average of 18% and 36% respectively).[106]

Of the employers in NI who have not offered or considered offering apprenticeships and graduate internships a variety of reasons were given. The most common include preferring to recruit fully trained or qualified staff, not being worth the time for the money received and interestingly not knowing enough about them.[107]

In response to comments and requests made by employers in the Digital Circle trade association in Northern Ireland, Skillset undertook a scoping exercise to address, among other issues, the perception that new graduates are not fully equipped to deal with the latest software and are lacking in high-level creative and entrepreneurial skills. Once this research was analysed and accepted by the Skillset NI National Advisory Board the Skillset Northern Ireland Media Academy began to explore areas where co-operation with industry could be improved pre-graduation (apprenticeships and internships) and to develop CPD courses required to up-skill the existing workforce.

This oversupply, however, does not prevent what is commonly acknowledged as a significant supply-side challenge in the Northern Ireland Creative Media Industries – namely a skills shortage in numerous more technical occupations such as Broadcast Engineering, Post Production, Archiving, Visual Effects, Animation, mobile and internet content, and roles in Publishing such as sub-editors.

Animation, Post Production and Mobile and Internet Content are key areas identified in the NI Digital Content Strategy[108] which outlined Skillset's lead role in helping to develop skills in these key areas. In order to grow in these areas, attract inward investment and form local clusters it is important that training in industry standard technology such as MAYA is available. Maya for example, would give local companies an advantage and support development across Film & TV, Post Production, Animation and Mobile and Internet gaming. This can be achieved through both short courses and by supporting HE and FE Animation courses.

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[105] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising

[106] Ibid

[107] Ibid

[108] Invest Northern Ireland (2008), The Northern Ireland Digital Content Strategy

A further problem noted by stakeholders in Northern Ireland is the challenge of 'establishing' newcomers following entry level recruitment, since time and resources are needed to provide essential learning and development under tight budgets. The early career progression of new entrants can be slow in these circumstances, though a 'vicious circle' exists whereby required resources often remain elusive in the absence of commercial success, which itself partly depends on the calibre of the workforce and their skills.

Across the Creative Media Industries in the UK and NI, more generic 'transferable' skills that are in short supply from new entrants include production skills for multi-platform content, understanding of intellectual property legislation, management and leadership, and commercial acumen. These shortages mean that in NI, many firms still import the labour they require to compensate for the inadequate supply of local talent. This is particularly true for NI Screen-funded film productions, which in recent years have typically had at least half of total cast and crew coming from outside NI.[109]

Greater focus on training for Mobile & Internet gaming and Mobile applications development is also required to take advantage of the current opportunities that exist within the growing mobile and tablet devices markets.[110] Multi-skilling competence is a significant requirement of digital media workflow, from content creation and production to metadata management. Yet there is a shortage of new people in the industry equipped with 'T-skills' and diagonal thinking ability - highly specialised in one core field, but with broad skills and knowledge to utilise their specialism across teams and platforms.[111]

3.3 Skills Gaps

Two fifths (40%) of employers in the Creative Media Industries in NI report a skills gap (significantly higher than the 27% of employers across the UK).[112] Of these employers 30% reported a skills gap amongst their employees, 17% amongst the freelancers they use and 53% amongst both employees and freelancers. The occupations in which a skills

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[109] Consultation with NI Screen, January 2010

[110] www.mobiadnews.com/?p=5001

[111] Skillset (2009) A Skills Review for the TV & Radio Sector; Skillset/UK Film Council (2008, 2005) Feature Film Production Workforce Surveys. Figures exclude Photo Imaging, Publishing and Advertising.

[112] This figure comprises the whole of the Creative Media Industries and is preferred to using Northern Ireland Skills Monitoring Survey 2005 data due to currency of data and also the exclusion of many of those working in Interactive Media, Content for Computer Games and Facilities (without these sectors 4% of establishments in NI report a skills gap as reported in the UK Employment and Skills Almanac 2010). A total of 550 skills gaps were identified.

gap is most likely to exist amongst both employees and freelancers are art and design, strategic management, and distribution, sales and marketing.[113]

For Creative Media employers in NI, using software packages such as Photoshop, Avid and Final Cut Pro was the most common skills gap area amongst their employees (69%). This was followed by sales and marketing (65%), leadership and management (54%), multi-skilling (49%) and technical skills including a common specific mention of 'CGI: 3D/Animation/VFX/Graphic design' and computer/software usage (47%). Very similar skills gaps were cited amongst freelancers, with the addition of 'camera' as a specific technical skills gap. [114]

Three in ten (30%) of Creative Media employers in NI attributed the skills gaps they currently had to a lack of staff motivation. A further 25% cited a failure to train and develop staff.[115]

Skills gaps had various effects on the companies experiencing them including delaying the development of new products/services (81% of employers in NI), experiencing problems meeting quality standards (53%) and the actual loss of business to competitors (52%). However, seven in ten (71%) employers have taken actions to address the skills gaps they're experiencing. The actions most commonly taken are skilling up the existing workforce (64% of employers) and redefining existing jobs (40%).[116]

The Skillset National Advisory Board for NI has identified a need for additional skills in the Post Production sector in the Province particularly in relation to CGI and VFX[117]. The continuing growth of the Film Production sector here and the expected expansion in Television drama and factual programming (as a result of the BBC's increase in network spending in the nations and regions) are creating a demand for this expertise which no company in Northern Ireland is currently offering.

Management, leadership and commercial acumen are major development needs across the workforce in all Creative Media Industries, particularly in relation to project and production management for multi-platform (though it must be said that this particular skills

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[113] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising

[114] Ibid

[115] Ibid

[116] Ibid

[117] Skillset has contributed to the BIS/DCMS commissioned NESTA review of skills in Games and VFX chaired by Ian Livingstone and Alex Hope. Due to be published on 1st February 2011 the review will provide a comprehensive overview of current skills issues and policy recommendations for these sectors across the UK.

gap is common across most NI industries).[118] On a senior management level, gaps in negotiation and leadership skills are frequently associated with the challenges of managing the change from traditional to digital. Typically lack of managerial skills arises because persons are recruited from technical positions without significant experience in management. Skillset's recent qualitative research has also identified a shortage of executive and senior producers with the necessary skills and reputation to win and manage commissions at network level, though there are a substantial number who can point to significant experience at regional level.[119]

A slightly different, but equally important, skills gap exists in the Publishing industry. From discussions with industry, the commercial side of the business tends to attract many graduates from differing subject backgrounds for example business related subjects, marketing etc. Despite having a graduate qualification, many graduates tend to lack the specific skills and flair needed for a position in sales. Some consultees mentioned that a course either through HE or FE focussed on sales and commercial skills in Northern Ireland would be beneficial to the industry. For example a sales equivalent course to CAM (Communication, Advertising and Marketing) which is offered at Jordanstown would be a suggestion.[120]

Overall, Creative Media professionals need to become increasingly multi-faceted and have transferable skills. Ideas often need to be multi-disciplinary and media neutral so that they can be applied down a number of channels. The increasing importance of digital content has led to a growth in the value of specialists in this discipline, expanding existing roles and creating entirely new roles. This has the knock on effect of increasing employee churn and higher salaries. Across industry, people are required to have a broader understanding of technologies related to their function, be it software, hardware or communication technology.

3.4 Skills Supply

3.4.1 Skills Supply: the Education System

Considering the education system and the workforce of the future, a suite of issues affect the growth of the Creative Media Industries. Northern Ireland is recognised as having a

[118] Skillset (2008) Creative Media Workforce Survey, Skillset (2009) A Skills Review for the TV & Radio Sector.

[119] Focus group with Northern Ireland employers and stakeholders undertaken in October 2010 as part of Skillset's employer and stakeholder qualitative framework 2010.

[120] Ibid

highly qualified workforce, yet the relationship between education and the Creative Media Industries remains unproductive. For example:

In Higher and Further Education

- It is estimated that in 2008-09 around 720,000 learners in FE were studying courses relevant to Skillset industries (from here on referred to as 'Skillset relevant courses'[121]), including 43,900 enrolments in Northern Ireland.[122] In addition, over 757,000 were studying Skillset relevant courses at UK HE institutions, including 15,000 in NI.[123] In terms of outcomes, 10% of all Skillset relevant students who have gained employment 6 months after graduating have done so within Skillset industries.[124]
- In total, over 23,000 Skillset relevant courses were available through FE, HE and the private sector across the UK in 2008/09.HE is the main source of Skillset relevant courses identifying 18,250 with students in UK HE institutions in 2008/09 (course provision was most common in the key sector areas of VFX, Film, and TV). This includes 400 in NI (2% of all courses in the UK). Just over 2,500 courses are available in FE across the UK and the leading private sector providers identify a further 2,400 courses across the UK (no data is available for NI).[125]
- Funding for these activities is in excess of £96 million. Figures for HE are difficult to identify given the finance reporting requirements for HESA, but HE institutions attracted £35.4 million in research and contract work in Creative Media departments at UK HE institutions (approximately £2 million in NI). FE Skillset relevant courses

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[121] Skillset-relevant courses are those defined through course codes within the HESA Joint Academic Coding system (JACs) and FE 'learning aims' as potentially relevant to Skillset key sectors and the functions and occupations within them.

[122] Northern Ireland DELNI Data Update 2008/09 (figures relate to enrolments not learners) as reported in Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Learning and development Provision in FE, HE, and the Private Sector in the UK. NB These figures include Fashion & Textiles which is not in the scope of this SSA. Further information regarding this study can be found in the methodology section.

[123] HESA 2008/09 as reported in Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Learning and development Provision in FE, HE, and the Private Sector in the UK. NB These figures include Fashion & Textiles which is not in the scope of this SSA. Further information regarding this study can be found in the methodology section.

[124] Since 2002/03 HESA have administered a survey of HE leavers called the Destinations of Leavers from Higher Education (DLHE). This replaced the previous First Destinations Supplement (FDS) and seeks to collect a richer set of data then held previously particularly focused upon on the employment and further study graduates move in to after their studies.

[125] HESA 2008/09 and ILR 2008/09 as reported in Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Learning and development Provision in FE, HE, and the Private Sector in the UK. NB These figures include Fashion & Textiles which is not in the scope of this SSA. Further information regarding this study can be found in the methodology section.

attracted in excess of £60.7 million in tuition fees from a range of sources including the LSC, private individuals and employers in 2008/09 (no data available for Northern Ireland).[126]

- Although HE and FE provide valuable skills into the wider community, in terms of the Creative Media Industries, too many courses produce graduates with insufficient specialisms to meet employer needs. The prospect of the changed modus operandi for HE funding across the HE sector in future years only exacerbates the concern that the gap between ever-changing industry needs and more slowly-evolving HE course content could widen substantially and further hit industry competitiveness. However it could also be used as an opportunity to prioritise funding to a smaller number of more appropriate courses, which could start to address the problem of both an excess supply overall and an excess number of less specialist, industry-relevant courses.

- Employers are keen to promote greater take up of Sector Skills Council-backed courses and accreditation services. The fact that major Creative Industries employers in Northern Ireland have actively engaged with a number of courses offered by the Skillset NI Media Academy illustrates a growing appreciation of the need to help the education sector meet industry needs. Furthermore the Skillset NI Media Academy reports that the number of students applying for its courses has almost doubled since it achieved Skillset's accreditation and licence.

- Barriers remain in creating cross-disciplinary pathways in education that would add significant value for the Creative Media Industries. To support progression there is a need to bring students together across disciplines to collaborate, innovate and pursue new research and development. Industry needs to be more engaged with Higher Education to help shape provision, support delivery and provide work experiences that enable graduates to become more work ready.

- Work is now also underway to position the Skillset Academies and Accredited Courses as the suppliers of higher level professional skill development and applied research, however this needs to be accelerated and the need for brokerage between Industry and the providers needs to be recognised and funded.

- Some impressive UK wide statistics are available comparing the destinations of students from Skillset accredited courses and Skillset Academy courses to more general Skillset relevant courses. Students from Skillset Accredited and Skillset

[126] Ibid

Academy courses are more likely to find Skillset relevant employment than their counterparts on more general Skillset relevant courses.

Consequently, over a third of all Skillset Accredited course students (33.8%) and over a quarter of Skillset Academy course students (26.4%) who find employment six months after their course find employment in Skillset industries. For Accredited courses this is over three times the 10% of students on all Skillset relevant courses who find employment in Skillset industries.

Without downplaying the importance of higher level skills development and qualifications, it is also worth recognising that not all entrants to the Creative Media sector need to be graduates. The value of practical work experience continues to marginalise the attainment of specific qualifications in gaining a first job, in spite of the pronounced trend of recent decades towards greater participation in higher education.

Over half (56%) of Northern Ireland based Creative Media employers offer work placements or work experience posts, whilst a further 27% would consider offering such posts. Across the UK, Community/Voluntary Radio (88%), Broadcast Radio (77%) and Publishing of Newspapers (73%) are the sectors most likely to offer already.[127]

The failure of some specific media studies disciplines to establish credibility amongst industry employers has meant that many new entrants to Creative Media hold a degree which is not highly demanded by employers: for these people, the three years of study may have been better spent gaining practical work experience, while for other talented potential recruits the lure of greater financial rewards elsewhere may see them lost to the industry.

Establishing a clearer and more mutually beneficial relationship between higher education and Creative Media employers remains a major challenge relevant across both NI and the rest of the UK. In return for making course provision more industry-relevant, education institutions want to see the Creative Media Industries offering more work placements.

However there are some notable strengths in the higher education and learning and development offering to the NI Creative Media Industries. There is a consensus that the journalism course content at the University of Ulster, Coleraine is of the highest quality, being NCTJ accredited. Other courses include Design and Communication at Magee offering study in the fields of animation, graphic design, illustration, 3D product and design, interactive and moving image design and also Interactive Media Arts at Coleraine

[127] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising

which has recently become part of a consortium of courses in the Northern Ireland Skillset Media Academy.

Northern Ireland is unique in the sense that it shares its border with the Republic of Ireland which has implications for the Creative Media Industries in terms of labour mobility and transferable skills. The University of Ulster has highlighted the need for a joined up approach to addressing the skills needs of the Creative Media Industries given the proximity of the two jurisdictions. This has been highlighted in their tender for the Interreg 'Special European Union Programmes Body (SEUPB) - Appointment of a Lead Partner(s) with Project Partners to Deliver the Creative Industries Programme' in which Skillset, UoU, the Dundalk Institute of Technology, the Adam Smith Institute and the Skillset Media Academy are partners. At the time of writing this report, the Interreg bid has been re-worked and re-submitted to the SEUPB; a decision is expected in February 2011. If successful this bid would aim to create a senior management team from across the creative industries, north and south of the border.

In schools and colleges

As in the UK, there remain significant issues with careers advice. Students generally are not receiving high quality advice to help them understand the opportunities across the Creative Media sectors and make appropriate subject choices. This is partly understandable as some Creative Media sectors are still relatively new and unknown, and there is a tendency for NI school leavers to be attracted to careers perceived to be 'safer' and more predictable, e.g. medicine, law, accountancy and teaching.

The online site Skillset Careers[128] has been established to help rectify the gap in relevant careers information, advice and guidance for the Creative Media Industries.

3.4.2 Skills Supply: Workforce Development

Demand for learning and development remains high across the UK Creative Media Industries, though numerous barriers to learning and development remain a challenge. In 2008, slightly less people in the NI Creative Media Industries workforce (85% compared to 90% in the UK) reported barriers or obstacles to learning and development. Overall, the most common barriers were the difficulty in assessing the quality of courses (38%),

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[128] www.skillset.org/careers.

available learning and development was in 'inconvenient places' (33%) and that fees are too high (31%).[129]

Compared to the UK-wide responses, less NI employees and freelancers claimed that employers were unwilling to pay for learning and development.**[130]** For many NI employers there is a perennial conflict in terms of resourcing. Time and budgets are usually tight – a problem exacerbated by the fact that most NI firms are very small – and the high opportunity cost of senior staff time even provides a barrier to important forms of in-work learning and development for less experienced employees, such as mentoring and work shadowing.

Research revealed that there were considerable differences between the experiences of employees and freelancers in learning and development participation. A far higher proportion of NI freelancers than employees reported virtually every type of barrier. For example, NI freelancers were more likely to fear losing work due to committing time to learning and development (47% v. 4%), and the possible loss of earnings too high a risk (36% v. 5%).[131] In fact, a key skills development issue – particularly in NI – is almost certainly to provide greater recognition and consideration of the needs of freelancers, on whom so much of the Creative Media sector's performance depends.

The only barriers more widely reported by NI employees than freelancers were difficulty assessing the quality of courses, employers being unwilling to pay for learning and development and a lack of information available.[132]

More recently, two fifths (41%) of Creative Media employers in NI reported that they had funded or arranged learning or development for their workforce in the past 12 months. In addition, 24% of these Creative Media employers who fund or arrange learning or development do not make it available to freelancers.[133]

Approaching three fifths (58%) of employers in NI cited barriers that restricted their ability to provide more learning and development. The most common reasons being that 'the company cannot afford to invest in learning and development' or 'not having enough time'

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[129] Skillset (2008) Creative Media Workforce Survey, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey reported in Skillset (2009) Photo Imaging Labour Market Intelligence Digest. Excludes Publishing and Advertising due to low sample sizes in NI in Labour Force Survey. NB: Survey respondents were able to select multiple barrier options.

[130] Ibid (24% in NI against 29% in UK)

[131] Ibid

[132] Ibid

[133] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

(both mentioned by 68% of employers), followed by courses generally not being suitable for the company's needs (48%).[134]

A particular issue for NI, as for many other northern UK regions, is the challenge of establishing national and international credibility with indigenous productions. Not only is this a key issue for staff recruitment and retention (regardless of the quality of the outputs, the name of the parties involved is often a more important reputational factor), it also impacts upon the credibility and transferability of on-the-job learning and development. For example, for this type of learning and development to be recognised and perceived as credible, employees need to be recognised as having made a valuable contribution to a reputable production. In the absence of this perceived external credibility, employees sometimes fail to enjoy the same rate of returns to learning and development – in terms of career progression and reward – than they might in places like London.

Furthermore, a key issue in terms of workforce development for the digital economy across the UK is the key role of leaders and managers in the Creative Media Industries in creating new business models and exploiting the opportunities provided by digital platforms. SMEs in particular need help, which is not currently widely available, to understand the potential, find new approaches to content creation and Intellectual Property exploitation, and develop new business models for growth.

3.4.3 Skills Supply: Diversity

A particular issue in terms of skills supply into the Creative Media Industries is the changing profile in terms of women and Black, Asian and Minority Ethnic (BAME) representation, which has fallen sharply in recent years in some sub-sectors, along with an increase in people leaving the industries in their thirties and forties.[135] In addition, the industry's traditional reliance on an extremely young workforce may in the future be challenged by the changing demographics of fewer young people coming through the education system. A workforce representative of our population is key to economic success and '…organisations that want to do business with this changing population realise they'll have a better chance if the make-up of their own workforce mirrors that of their potential customers'.[136] If this is not addressed fast it could potentially represent a major gap in qualifications and experienced talent with implications for the industry at

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[134] Ibid

[135] Skillset (2008) Creative Media Workforce Survey; Skillset (2006) Balancing Children and Work in the Audio Visual Industries, Skillset (2005) Survey of the Audio Visual Industries' Workforce, Skillset (2003) Workforce Survey.

[136] From Samir Shah's address to the audience of a RTS Fleming Memorial Lecture (2009).

large. In Northern Ireland the issue of diversity tends to focus more on the question of the perceived religious make-up of the workforce and, to a lesser extent, on questions involving disability. Levels of BAME representation in the general population have always been low and this is reflected by the small numbers in the Province's Creative Media Industries.

A project undertaken by Skillset this year to map Creative Media and Fashion & Textiles relevant education and training provision in FE, HE, and the private sector also looked at the demographics of those in the education system. Looking specifically at HE the following demographic profile emerges[137]:

- Skillset relevant students are generally younger than their non-Skillset relevant counterparts. 45% of Skillset relevant students are aged 18-20 years compared with 29% of all students on non-Skillset relevant courses, whilst just 15% of Skillset relevant students are aged 30 or over, compared with 32.7% of students on non-Skillset relevant courses. Advertising, Radio, Publishing and Film courses are dominated by the youngest students;

- Male students make up a greater than average proportion of students on Skillset relevant courses with 57% of all students being men. This compares with 40% of students on non-Skillset relevant courses. TV, Film, and Advertising courses have the highest level of female students, whilst Facilities, Interactive Media and VFX tend to be more male dominated;

- Students from BAME backgrounds are slightly more common on Skillset relevant courses than non-Skillset relevant courses. 15.2% of Skillset relevant students come from a BAME background compared with 14.3% on non-Skillset relevant courses. Almost one fifth (17%) of all BAME students in the UK study Skillset relevant courses. Students from BAME backgrounds are most common on Interactive Media, Computer Games, and VFX courses;

- Skillset relevant students are more likely to have disabilities than their counterparts on non-Skillset relevant courses. On Skillset relevant courses 11% are students with disabilities compared with 7.8% of students on non-Skillset relevant courses. Courses relevant to Animation, TV, Film, and Photo Imaging have higher than all Skillset relevant courses numbers of students

[137] All figures from HESA 2008/09 quoted in Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Learning and development Provision in FE, HE, and the Private Sector in the UK. NB These figures include Fashion & Textiles which is not in the scope of this SSA. Further information regarding this study can be found in the methodology section.

4 Anticipating What Lies Ahead

4.1 Growth Potential

Recent forecasts by PwC suggested that the UK entertainment and media market would grow by 3.7% per annum on average for the 4 years to 2014.[138] This compares to whole economy growth over this period of just over 2%.[139] Given the reported business optimism from Skillset's October 2010 qualitative research phase these assumptions look realistic. Global growth in the E&M market is expected to reach 5% year-on-year and total $1.7 trillion by 2014.[140]

Increasingly the Creative Media market is a global market. Content for Computer Games, Advertising, Film, Television (especially the UK's excellent record in exporting TV formats), Animation and Publishing are all globally integrated sectors.

Many analysts predict that traditional incumbent companies will remain dominant, sometimes through acquiring companies with a strong digital presence.[141] The opportunities presented by developing technology may be beyond the scope of almost all single companies, even large established multinationals or conglomerates. Alliances and partnerships will therefore be formed for opportunities to be realised, commonly with Technology companies, and sometimes with companies that will be competitors in other markets. There is significant potential for levels of collaboration and co-working to be increased in NI, particularly given the smaller-than-average nature of many of its Creative Media companies and the relatively high prevalence of freelancing. This could help NI firms to compete in UK and international markets and to attract and retain talent.

Baseline forecasts provided by Oxford Economics to ACNI, for the wider Creative Industries, predict annual average employment growth of 1.5% pa 2010-2015 (compared to 2.3% pa in the five years pre-recession).

In Northern Ireland, the sectoral outlook is generally positive if potentially mixed across sub-sectors. NI Screen, the national screen agency, foresees strong growth in opportunities across all its core areas of responsibility including Film, TV drama, other TV and digital content.

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[138] Towards 2014, the search for value in the digital supply chain PwC 2010

[139] http://budgetresponsibility.independent.gov.uk/d/pre_budget_forecast_140610.pdf

[140] Ibid

[141] Skillset Strategic Plan 2008-2011

The prospect of an increased BBC network spend in the region is however a major growth opportunity and one of potentially few major economic opportunities for NI during the post-recession era of reduced public spending, though a skills bottleneck may arise from potential Ofcom requirements for a high proportion of employees to be NI residents. Elsewhere, print journalism faces a less certain future given changing consumer preferences in accessing news and information – potentially there is a risk of losing journalism skills from the industry if this talent cannot be utilised or re-skilled and transferred to other sectors. For example, Skillset and Creative and Cultural Skills are currently organising workshops and seminars involving Independent Television Production companies and digital content providers (e.g. web page designers, games designers) to explore the opportunities which may be offered by the BBC's increase in network spend in Northern Ireland and by the developing concept of 360-degree commissioning.

4.2 Changing Skills Needs

Skillset's 2010 Creative Media Employer Survey asked employers in Northern Ireland to think three to five years into the future and predict skills for which there will be a demand that will be difficult to meet. The skills identified by employers were consistent with those also identified as current skills gaps amongst the workforce. More than two fifths of employers identified using software packages such as Photoshop, Avid and Final Cut Pro as a future skills gap area (44%), followed by sales and marketing (41%), creative talent (39%) and finance skills (34%).[142]

Across all Creative Media Industries, there is recognition of the dramatic changes brought about by the digital environment and the need to up-skill to make the most of it. The following are of particular importance in Northern Ireland, especially given the number of SME's, micro-businesses and freelancers operating in most sectors:

- Multi-skilling: an understanding of different technology platforms and their impact on content development and digital work flow, and new approaches to working in cross-functional creative / technical teams within and across companies. In Northern Ireland a significant number of journalists have recently lost their jobs, midway through their working lives, with the main broadcasting organisations and are seeking, through the Province's branch of the NUJ, opportunities to train in the new skill sets associated with the delivery of on-line content.

[142] Skillset (2010) Creative Media Employer Survey. Figures exclude Advertising.

- Multiplatform skills: the creative and technical skills to produce content for distribution across all potential platforms, and the ability to understand and exploit technological advances.
- Management, leadership, commercial acumen and entrepreneurial skills: the Skillset National Advisory Board for Northern Ireland has identified the development of these skills as essential for the future health of the Creative Media Industries in Northern Ireland, especially, the need for more senior and executive television producers, project management for multi-platform development; the hybrid skills combining effective leadership with innovation, creativity and understanding of technology, and the analytical skills to understand audience interests and translate it into business intelligence.
- IP and monetisation of multiplatform content: understanding of intellectual property legislation to protect from piracy, and exploiting intellectual property internationally to take full advantage of emerging markets - with particular focus on the ability to deal with the problem of illegal downloading and copyright infringement.
- Broadcast engineering: continuing to be an area of skills shortage.
- Archiving[143]: archiving of digital content being an area which is attracting increased attention as a challenging issue for the future.
- Sales and marketing: being particularly important in Commercial Radio and an emerging need in other sectors.
- Diagonal thinking: the ability to tell great stories, then know how to monetise those stories to the best effect utilising media that cross platforms and territories well.

There also needs to be particular recognition of the needs of the freelancers upon whom so much of the Creative Media Industries depend.

Of course the major challenge is translating the above changing skill needs into education, learning and development initiatives that address these needs. The reality is that academic courses are not particularly suited to meeting these needs, with instead work experience, mentoring and apprenticeships etc more appropriate.

Even where academic or even vocational courses are appropriate, NI faces a critical mass problem in that it will be costly to offer niche courses for potentially few students.

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[143] Archiving falls within the broader category of ‘Asset Management’ and also includes indexing and tasks relating to the management/storage/retrieval of multi-media or digital assets.

5 Geographical Differences in Labour and Skill Needs

5.1 Sector Employment across NI and the UK

Within Northern Ireland, it is difficult to comment on the distribution of Creative Media employment given data limitations. However using what data is available from DETI's bi-annual Census of employment, reveals that Belfast dominates the Radio and TV sector (in employment terms) but is less dominant in Motion Picture/Film and Newspaper Publishing (though Belfast still has between two-fifths and half of jobs in these sectors). No other area in NI however has any significant concentration or clustering of Creative Media sector employment outside Belfast, for example, Newspaper Publishing employment is relatively evenly distributed.

Though Belfast is of course the natural choice for the largest organisations to locate, key infrastructure and supply chains are spread much more evenly. For example, the Skillset NI Media Academy consists of 4 partners led by the University of Ulster at Coleraine, together with the Belfast Metropolitan College, the North-West Regional College in Londonderry and the Southern Regional College in Newry; both BBC NI and UTV have a series of remote studios and news correspondents across the Province; the BBC has it's offshoot local Radio station, Radio Foyle, based in Londonderry; and there are 13 Community Radio stations around Northern Ireland with almost 1,400 volunteers.[144]

Table 4 shows that 2% of the UK Creative Media workforce is based in NI. Since NI makes up around 3% of the UK population[145], this finding suggests that per capita, NI has (albeit marginal) disproportionately lower levels of employment in Creative Media. The table illustrates the dominance London and the South East of England has on employment in the Creative Media Industries: half the workforce being based in these two regions combined.

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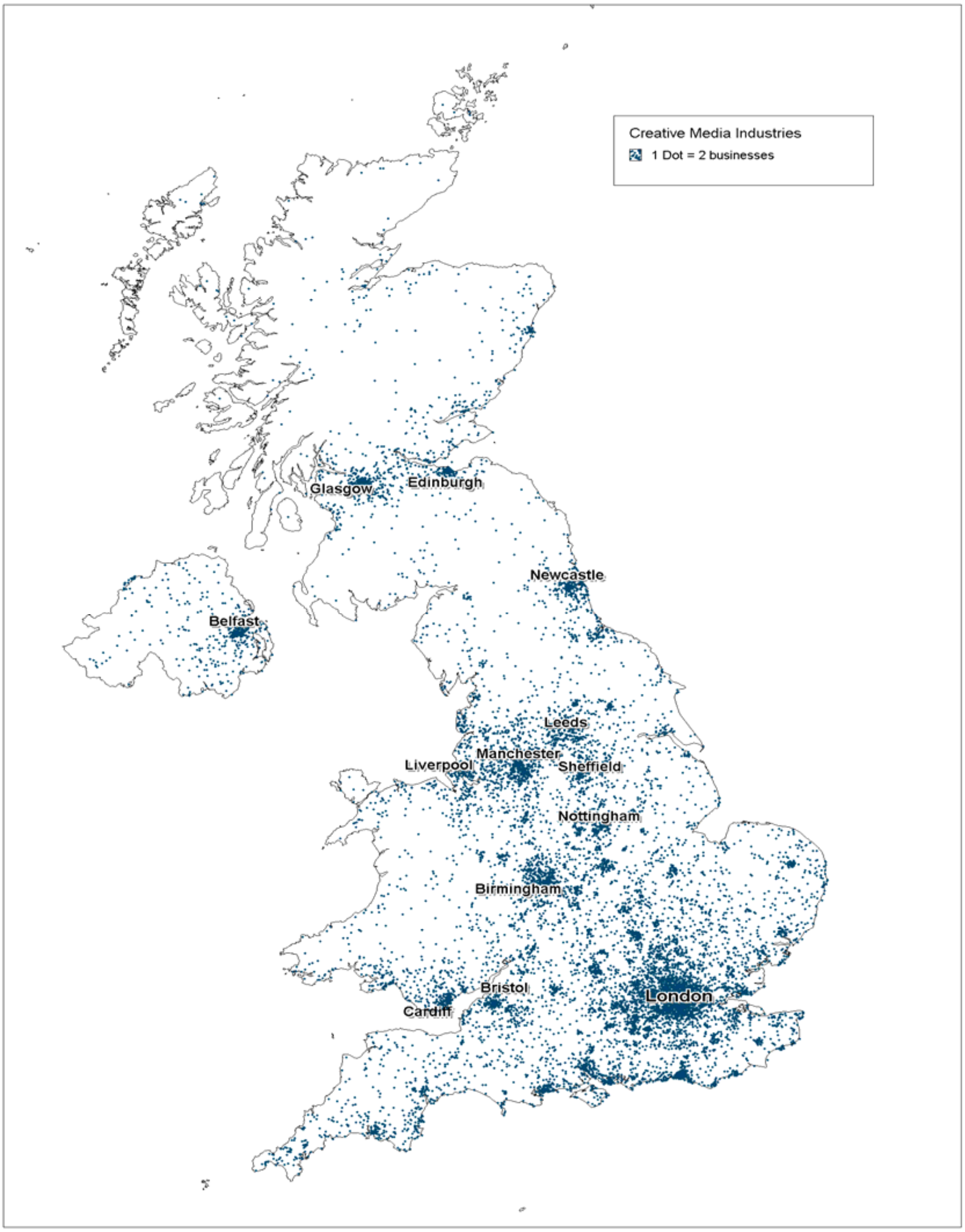
[144] Skillset (2009) Employment Census

[145] LFS, ONS July 2009 – June 2010

Table 4 Work base of Creative Media Workforce

Nation/English Region	% of UK total
Wales	**4%**
Scotland	**5%**
Northern Ireland	**2%**
England	**90%**
All London	38%
South East England (excluding London)	12%
South West England	8%
West Midlands	5%
East Midlands	4%
North East England	2%
Yorkshire & the Humber	5%
East of England	8%
North West England	9%

Source: Skillset (2009) Employment Census, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey 2008, LFS July 2009 – June 2010. Cinema Exhibition excluded.



The following map illustrates the distribution of Creative Media companies contained in Skillset's 2010 Company Database[146] by post code district. This map clearly acknowledges the dominance of Belfast within the Nation's Creative Media Industries.

5.2 Characteristics of the Workforce

Most key occupational groups within the industry operate within a national or international labour market; people will generally need to be willing to travel to wherever work is in order to develop or sustain a career in the industry. In Northern Ireland, skills supply constraints mean that a significant proportion of talent is imported, particularly in the **Film sector**. This is

[146] Excluding Advertising and Cinema Exhibition. Database created from a variety of sources including previous research participants, Trade Association membership lists, Industry Directories and Experian.

generally viewed as unsustainable, for financial reasons (workers willing to relocate internationally are typically highly paid), mobility reasons (imported labour is often ‘footloose’) and the practical concern that the continued importing of labour will inevitably restrict opportunities for indigenous and particularly young indigenous workers to further their careers.

Annex A Methodology Section

- **Skillset's 2010 Creative Media Employer Survey** was conducted via telephone interviews between June – September 2010 by the research agency IFF. A sample of Creative Media employers was compiled from Skillset's 2010 Company Database (created from a variety of sources including previous research participants, Trade Association membership lists and Industry Directories). A total of 2,634 interviews were completed. The data was weighted to known distributions of companies by sub-sector, size and region/nation to ensure representative of all Creative Media companies.

  The sectors covered by the survey included Television, Radio, Animation, Film, Facilities, Interactive Media, Content for Computer Games, Corporate Production, Commercials and Pop Promos, Publishing and Photo Imaging.

  The full 2010 Creative Media Employer Survey report will be available in early 2011.

- **Mapping Creative Media and Fashion & Textiles Relevant Education and Learning and Development Provision in FE, HE, and the Private Sector in the UK**

  This work was undertaken during 2010 by Research-as-Evidence, with on-going support and input from the Skillset research team and sector managers.

  The work aimed to fill an existing gap in supply-side knowledge to identify the specific nature of the supply side from FE, HE, and private sector training markets to the Creative Media Industries.

  This is the first time that Skillset have sought to define FE and HE provision in terms of relevance to its range of industry sector responsibilities. This is also the first time that datasets from the Higher Education Statistics Agency (HESA) and the Individualised Learner Record (ILR)[147] have been used in this way - and the first detailed analysis of the outcomes from HE/FE provision that Skillset directly influences (through course accreditation and/or the Film/Media Academy network).

  The research has produced a range of data on student demographics/ profiles, attainment and funding in FE and HE across the UK and additional data in relation to the most prominent commercial training providers serving Skillset sectors. The findings also include extensive analysis of data relating to early graduate destinations 6 months after students have completed their study, providing an important 'snapshot' of early

[147] See www.theia.org.uk/ilr for more details.

career destinations of those who have undertaken HE courses relevant to employment in Skillset industry sectors.

Defining Courses Relevant to Skillset Key Sectors

The numbers of students and courses recorded for each key sector (Advertising, Animation, Computer Games, Facilities, Fashion and Textiles, Film, Interactive Media, Photo imaging, Publishing, Radio, TV) has been defined in a new and innovative way. This means that courses in FE and HE have been defined in terms that assesses the relevance of each course to specific key sectors and the overall responsibilities of Skillset for the creative media and fashion and textiles industries.

Consequently, whilst the category Film will include Film Production, Direction or Scriptwriting courses it will also include those courses that include content directly relevant to the activities and occupations working in that sector like costume and set design, or computer animation for CGI. This avoids just identifying courses in broad categories such as Creative Arts and Design and Mass Communications and Documentation as had been done before which often meant including some non-relevant courses, but also missing out some relevant courses in other broad subject categories.

This does mean some courses will feature in multiple sectors because they may be relevant to a number of key sectors. For instance - Film and TV, and Computer Games and Animation. However, in the broad categories of Skillset relevant and non-Skillset relevant courses only feature in one of these two categories.

Student and course numbers identified in the report show the numbers recorded against these categories when the individual course definitions are combined for Skillset relevant and key sector courses. The student count is the number who are studying that combination of courses whether in the first, middle, or final years of study.

- **Employer and stakeholder qualitative framework 2010** – consists of a series of consultations and focus groups to contextualise quantitative data and begin to develop recommendations and solutions. In October 2010 three focus groups were held in Scotland, Wales and Northern Ireland with a representative group of industry employers and stakeholders from each nation. Telephone interviews were carried out to fill any gaps that remained after the focus groups. A further consultation was held with Skillset Directors, with additional input from Sector leads within the organisation where required. An email questionnaire was distributed to Advertising industry representatives via the

IPA Professional Development Group and also to other contacts in the industry (including Digital Agency representatives).

- **Skillset's Employment Census 2009** is a biennial survey to measure the size and shape of the Creative Media Industries (excluding Film Production freelancers, Photo Imaging, Publishing and Advertising). Census forms were distributed to companies throughout June for completion on 1 July. A central database of around 26,000 companies was set up at Skillset using a number of available sources including trade association membership lists, screen agency records and other databases. In addition, the Census was publicised in trade journals and national press in order to reach companies outside the membership of industry organisations. Each company was given three weeks to complete and return the questionnaire. Companies that had not responded by Monday 27 July were contacted by a range of media including letters, emails and telephone call (depending on sector and availability of contact information), with a final completion date of 31 July 2009. The 2009 Census achieved a response from 1,010 companies. The estimated percentage coverage of each sector has been used to generate estimates of the workforce in each sector and in the industry as a whole, from the responses received, through the calculation of weighting factors. These take into account all available information about the representation of the response for each sector in terms of numbers and size of companies.

- **From Recession to Recovery 2009** aimed to obtain a picture of the impact of the recession of 2009 on the Creative Media sector, and in particular its implications for the use of skills in the industry. All sectors were covered (with the exception of Advertising which was not part of Skillset's footprint at the time). The research comprised two separate strands: a survey of employers and a survey of trade associations. The fieldwork was conducted during summer 2009 (May – August), by way of an online survey which respondents were invited to complete by email or via Skillset's website. In the interests of expediency, employers with whom Skillset had had previous contact and thus were potentially involved in the skills agenda were primarily targeted, which should be taken into consideration when scrutinising the results. The survey was supplemented by a shorter, largely open ended survey of trade associations covering similar issues. Overall, the survey achieved a response from 262 companies. It is not possible to estimate the number of companies targeted or a final response rate due to the methods used to distribute the survey. The response by sector broadly reflects the respective levels of employment across the industry. Taking that into consideration, and given the relatively low numbers involved, data was not weighted to adjust for variations in levels of response and representativeness across sectors.

- **Film Sector Employers: Skills and Training Needs in Production, Distribution & Exhibition 2009** was undertaken up to inform the ongoing development of the Film Skills Strategy and the second phase of *A Bigger Future*, which will run from 2010-2013. Participating employers were selected from a broad range of companies varying by size (number of people employed), location in the UK, interest in mainstream and specialised films, and in production by experience of working at a range of budget levels (from below £500,000 to £5 million+). The fieldwork involved three elements:

  Two focus groups, each lasting two hours, were held with producers, line producers and production managers in January and February 2009.

  Face-to-face or telephone interviews lasting up to an hour were held with senior company executives within distribution and exhibition throughout the period from January to March 2009. Five interviews were held in total within distribution and a total of six interviews were held within exhibition, involving.

  Face-to-face interviews lasting up to an hour were held in March and April 2009 with three senior production and development executives from two national film funding organisations.

- **A Skills Review for the TV & Radio Sector, 2009 -** in October 2008 Ofcom, Skillset and the Broadcast Training & Skills Regulator (BTSR) agreed to conduct a short 'Skills Review' of the TV and radio broadcasting industry. As organisations responsible, in different ways, for supporting, regulating and monitoring the broadcasting sectors it was recognised that major technological, structural and economic changes were at play and that it would be helpful to all three organisations to analyse the impact of these changes on people and skills.
  The terms of reference established that the TV and Radio Skills Review would be a 'temperature check' on the skills health of the sectors, capturing and summarising as much data and evidence as possible in order to inform the work and actions of the industry itself, the Sector Skills Council and the regulator.

  To support the deliberations of the Review Group, existing research was to be used as the main source of data and evidence. Skillset's Census, Workforce Survey and Employers surveys, BTSR's evaluation data and the wider research carried out by organisations such as NESTA and Spectrum would be used to support the analysis. In order to contextualise this data and ensure currency, the Review Group invited a small number of Expert Witnesses (both employers and training providers) to provide a rich source of information about employment practice, recruitment issues and skill needs. The Review Group is indebted to the Expert Witnesses for the time they gave and the insight provided.

- **Skillset's Creative Media Workforce Survey 2008** is a biennial survey of the Creative Media workforce and provides the most comprehensive profile of working life in the UK's creative sectors ever produced (excluding Film Production freelancers, Photo Imaging, Publishing and Advertising)[148]. It includes questions on working patterns; training needs and experiences; qualifications; and demographics. In order to provide the perspective and capture the experience of both individuals working at the time of the survey and those available to the workforce but not actually employed at the time of the survey, a self-completion questionnaire was distributed by post or by email to employees and freelancers via two main routes during May 2008. A boost set of questionnaires were sent out to the Commercial Radio sector in October 2008. The first route consisted of the distribution of around 28,500 questionnaires via and with the support of, Trade Associations, Membership Organisations and Unions. Second, over 8,000 paper questionnaires were distributed via approximately 700 industry employers in order to ensure adequate representation from individuals working at the time of the survey. Skillset's Employer Database was used to target companies and the information from Skillset's Employment Census 2006 on numbers of employees and freelancers in each company was used to calculate the number of questionnaires with which to target each company. Employers were asked to distribute the questionnaires internally to their workforce. Approximately 1,000 industry employers received an email direct from Skillset requesting their assistance in terms of circulating a link to the online survey to their workforce. A total of 4,970 completed valid questionnaires were received. To account for non-response 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 2006 Employment Census.

[148] Skillset's Creative Media Workforce Survey 2010 will be published in early 2011 and includes all Creative Media sectors with the exception of Advertising (which was not part of Skillset's footprint when planning for this survey commenced).

- **Skillset/UK Film Council, Feature Film Production Workforce Survey 2008** is a biennial survey conducted as part of a cycle of film production surveys on order to obtain a reliable picture of working patterns, current and future skills development needs, existing provision, and barriers experienced to receiving training and development from film sectors not covered elsewhere by research.[149] The survey covered all individuals working on feature film productions that met the following eligibility criteria:

  - shooting took place within calendar year 2006;
  - the production was 80 minutes or longer in duration;
  - it had a minimum budget of £500,000;
  - it involved UK crew;
  - it was intended for theatrical release.

  There were 102 feature film productions eligible for the survey according to these criteria. Of these a total of 54 productions facilitated the involvement of their crew in the survey, 37 either refused to support the study or it was not possible to establish contact with the production office and a further ten involved few UK based crew.

  Over 6,600 names were gradually compiled from the crew lists for these productions. Duplicate names of individuals appearing on more than one production list were removed, resulting in a list of around 5,500 individual UK crew members.

  Production companies and producers distributed questionnaires to their crew and as a result it is not possible to know for certain how many were sent out, which means an accurate response rate cannot be calculated. However, a total of 1,158 respondents took part in the survey, equivalent to a response rate of 21% if every person on the de-duplicated crew lists received a questionnaire.

- **Skillset's Photo Imaging Workforce Survey 2007** was conducted via postal and online self-completion questionnaires between March – June 2007. The primary sample frame used was Experian's UK company database. This was supplemented by promotion of the survey via key trade associations and encouragement of their members to participate. A multi-stage sample design was created whereby questionnaires were sent directly to individual photographers and to individuals working

[149] Skillset/UKFC Feature Film Production Workforce Survey 2010 will be published in early 2011.

in all other photo imaging sectors via companies listed in the sample frame. A total of 1,041 completed questionnaires were received.

The survey covered all sectors of the Photo Imaging Industry including photographers, photography companies, photographic equipment and manufacture support services, picture libraries and agencies, picture laboratories, photo imaging specific retail companies and design studio hire/image producers.

This data will be updated by the 2010 Creative Media Workforce Survey due for release in early 2011.

- **Skillset's Employment Census 2006** – the last Census conducted prior to 2009, was conducted to measure the size and shape of the Creative Media Industries (excluding Film Production freelancers, Photo Imaging, Publishing and Advertising). Census forms were distributed to companies throughout June for completion on 12 July 2006. A central database of around 13,000 companies was set up at Skillset using a number of available sources including trade association membership lists, screen agency records and other databases. In addition, the Census was publicised in trade journals and national press in order to reach companies outside the membership of industry organisations. Each company was given two months to complete and return the questionnaire. The 2009 Census achieved a response from 2,878 companies. The estimated percentage coverage of each sector has been used to generate estimates of the workforce in each sector and in the industry as a whole, from the responses received, through the calculation of weighting factors. These take into account all available information about the representation of the response for each sector in terms of numbers and size of companies.

- **Balancing Children and Work in the Audio Visual Industries 2006** aimed investigate the factors specific to balancing a career with family life in the Creative Media sector, and in particular to identify and isolate the determinants of whether or not women remain in the industry at each phase of balancing a career with family life. There were two stages to the research. First, the design of the study was informed by structured one to one interviews with representatives from expert, industry, and government organisations. Second, study data were generated via five focus group discussions which took place during the first week of October 2006. Participants were organised characterised by homogeneity of characteristics determined by the purpose of the study and the sample specification (e.g. gender, presence of children), in order to capitalise on participants' shared experiences. In addition, in advance of the focus group discussions each participant was invited to complete a short questionnaire to provide context to the focus group discussions. A non-probability sample was designed. Sub-sectors of the were selected where Skillset research has shown there is either under-representation of women with dependents under the age of 16 (compared to men); the per cent of women working is above average; or there is a high degree of reliance on freelancers.

- **Survey of the Audio Visual Workforce 2005** – the last workforce survey conducted prior to 2008. The scope of the survey was all people employed in the following sectors: Broadcast, Independent Production for TV, Facilities, Interactive Media, Content for Computer Games, Corporate Production, Commercials, Animation.

  In order to provide the perspective and capture the experience of both individuals working at the time of the survey and those available to the workforce but not actually employed at the time of the survey, a self-completion questionnaire was distributed by post or by email to employees and freelancers via two main routes during March 2005.The quantity of questionnaires distributed was calculated based on the employment estimates reported in the 2004 Skillset Employment Census and an estimated rate of response based on previous experience of similar surveys.

  The first route consisted of distribution of around 74,000 questionnaires via and with the support of various trade organisations. Second, around 8,000 questionnaires were distributed via employers in sectors employing individuals in occupations not sufficiently represented by the trade organisations involved. The Skillset 2004 Employment Census company database was used to target companies and the information from the Census on numbers of employees and freelancers in each company was used to calculate the number of questionnaires with which to target each company. Employers were asked to distribute the questionnaires internally to their workforce. Six weeks following the initial distribution, reminder letters were issued. At this time, the sample was boosted by distributing 39,000 questionnaires to individuals via employers in sectors and occupations where the response was low. Again the information from the 2004 Skillset employment Census on numbers of employees and freelancers in each company was used to calculate the number of questionnaires with which to target each company.

A total of 6,885 completed valid questionnaires were received. It is not possible to calculate an exact response rate, as the exact number of questionnaires distributed via some channels is unknown.

Annex B: Northern Ireland Creative Media Employment

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

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

In addition, sample sizes for Northern Ireland are far too small to be published by official data sources for most SIC.

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

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

Table 5 below provides a full breakdown of employment in the Creative Media Industries from Skillset's primary research compared with estimates from official data sources. The table clearly shows the paucity of official data for the Creative Media Industries in Northern Ireland, where as noted earlier Interactive Media, Content for Computer Games and most of Facilities are not included at all, and reliable figures for those sectors that are included are only provided for Newspaper Publishing. The official data massively underestimates the scale of employment within the Creative Media Industries in Northern Ireland, only accounting for a proportion of employment, as illustrated by Skillset's industry endorsed primary research.

Figures from both sources have been grouped in ways that differ slightly from their 'natural' organisation within the two respective systems in order to enable comparison: in other words, the sectors as defined within SIC are not listed in chronological order, and the broad sector groupings used for Skillset data do not in every case reflect how the sector is usually mapped, defined or presented by Skillset. The sector groupings used here are intended purely to illustrate where definitions are compatible and where they are not, and what is and is not included within each dataset. Due to LFS sample size limitations for NI, there are few sub-sectors where it is possible to compare employment estimates from the two sources.

For more detail on the methodologies adopted please refer to: www.skillset.org

Table 5 Labour Force Survey and Skillset Creative Media Employment Estimates - Northern Ireland

LABOUR FORCE SURVEY[150]			SKILLSET[151]		
INDUSTRIES			INDUSTRIES		
SIC 2007	**Description**	**Total Employed**	**Main Sector**	**Sub-sector**	**Total Employed**
60.2	TV Programming & Broadcasting activities	*	**Television**	Broadcast TV	500
59.11/3	TV Programme Production activities			Cable and Satellite	0
59.13/3	TV Programme Distribution activities			Independent Production	1150
	Sub-total	*****		**Sub-total**	**1,650**
60.1	Radio Broadcasting	-	**Radio**	Broadcast Radio	2050
				Independent Production	0
	Sub-total	**-**		**Sub-total**	**2,050**
59.12	MP, V, and TV Programme Post-Production	-	**Facilities**	Post Production	50
				Studio and Equipment Hire	250
				Outside Broadcast	0
				VFX	*
				Special Physical Effects	0
				Manufacture of AV Equipment	0
				Processing Labs	0
				Other Services for Film and TV	50
	Sub-total	**-**		**Sub-total**	**350**
59.11/1	Motion Picture Production activities	*	**Film**	Film Production[152]	350
59.13/1	Motion Picture Distribution activities	-		Film Distribution	0
59.14	Motion Picture Projection activities	*		Cinema Exhibition	50
				Moving Picture Archives and Libraries	*

150 ONS Labour Force Survey July 2009 – June 2010.

151 Skillset (2009) Employment Census except for Publishing, Photo Imaging, Advertising, Creative Occupations outside the industry and other business sectors of interest.

152 Secondary analysis of unit lists for 2009 feature film productions (80 minutes or longer) and Skillset (2009) Employment Census.

LABOUR FORCE SURVEY[150]			SKILLSET[151]		
	Sub-total	*****		**Sub-total**	**400**
59.11/2	Video Production activities	-	**Other Content**	Animation	50
59.13/2	Video Distribution activities	-		Commercials and Pop Promos	300
18.20/2	Reproduction of video recording			Corporate Production	50
	Sub-total	**-**		**Sub-total**	**400**
			Interactive Media	Interactive Media	1,850
				Sub-total	**1,850**
			Content for Computer Games	Content and Development	*
				Sub-total	*****
			Additional Available Freelancers		**1,000**
74.2	Photographic activities	-	**Photo Imaging[153]**	Photographic activities	-
74.20/1	Portrait Photographic activities	*		Portrait Photographic activities	*
74.20/2	Other Specialist Photography not Portrait	-		Other Specialist Photography not	-
74.20/3	Film processing	*		Film processing	-
74.20/9	Other Photographic activities; n.e.c.	*		Other Photographic activities; n.e.c.	*
	Sub-total	*****		**Sub-total**	*****
58.11	Book Publishing	-	**Publishing[154]**	Book Publishing	-
58.12	Publishing of Directories & Mailing Lists	-		Publishing of Directories & Mailing	-
58.13	Publishing of Newspapers	1,000		Publishing of Newspapers	1,000
58.14	Publishing of Journals & Periodicals	-		Publishing of Journals & Periodicals	-
58.14/1	Publishing of Learned Journals	-		Publishing of Learned Journals	-

[153] ONS Labour Force Survey July 2009 – June 2010.

[154] Ibid

LABOUR FORCE SURVEY[150]			SKILLSET[151]		
58.14/2	Publishing of Consumer, Business and Professional Journals and Periodicals	*		Publishing of Consumer, Business and Professional Journals and	*
63.91	News Agency activities	-		News Agency activities	-
63.99	Other information Service activities n.e.c.	-		Other information Service activities	-
58.19	Other Publishing	-		Other Publishing	-
	Sub-total	**1,200**		**Sub-total**	**1,200**
73.10	Advertising Agencies	-	**Advertising[155]**	Advertising Agencies	
	Media Representation Services	-		Media Representation Services	
	Sub-total	**1,600**		**Sub-total**	**1,600**
	TOTAL	**4,950**		**TOTAL**	**10,900**
OCCUPATIONS OUTSIDE THE CREATIVE MEDIA INDUSTRY[156]			**OCCUPATIONS OUTSIDE THE CREATIVE MEDIA INDUSTRY[157]**		
SOC 2000	**Description**	**Total employed**	**SOC 2000**	**Description**	**Total employed**
3431	Journalists, Newspaper & Periodical Editors	-	3431	Journalists, Newspaper & Periodical	-
3432	Broadcasting Associate Professionals	-	3432	Broadcasting Associate Professionals	-
3434	Photographers & Audio-Visual equipment	*	3434	Photographers & Audio-Visual	*
1134	Advertising & Public Relation Managers	*	1134	Advertising & Public Relation	*
3433	Public Relations Officers	*	3433	Public Relations Officers	*
	TOTAL	**1,100**		**TOTAL**	**1,100**
INDUSTRIES + OCCUPATIONS [158]			**INDUSTRIES + OCCUPATIONS[159]**		
TOTAL		**6,050**	**TOTAL**		**12,000**

155 Ibid

156 Skillset's contract with UKCES states that Skillset has exclusive responsibility for occupations 3421, 3432 and 3434 and primary responsibility for 1134 and 3433.

157 Ibid

158 Ibid

159 Ibid

LABOUR FORCE SURVEY[150]			SKILLSET[151]		
OTHER BUSINESS SECTORS OF INTEREST[160]			OTHER BUSINESS SECTORS OF INTEREST [161]		
SIC 2007	**Description**	**Total Employed**	**Main Sector**	**Sub-sector**	**Total Employed**
18.20/3	Reproduction of Computer Media	-	**Content for Computer Games**	Reproduction of Computer Media	-
58.21	Publishing of Computer Games	-		Publishing of Computer Games	-
62.01	Computer programming activities			Computer programming activities	
62.01/1	Ready-made interactive leisure and entertainment software development	-		Ready-made interactive leisure and entertainment software development	-
62.01/2	Business and domestic software development	6,400		Business and domestic software	6,400
62.02	Computer consultancy activities	2,900	**Interactive Media**	Computer consultancy activities	2,900
63.12	Web portals	-		Web portals	-
	TOTAL	**9,300**		**TOTAL**	**9,300**

NB: '-' indicates data not available. All LFS data include all people working and not just those of working age. '*' indicates figures are suppressed due to unreliable estimates.

[160] Skillset's contract with UKCES does not include responsibility for these SIC outside the Creative Media Industries, they sit within the footprint of e-Skills. The following business sectors represent areas where there is a Creative Media interest.

[161] Ibid

Annex C UK Creative Media Sector Overview

In **TV and Radio**, the UK is particularly recognised for the quality of its public sector broadcasters alongside regulated subscription services such as BSkyB and Virgin Media). Exploiting broadband infrastructure to offer users ‘on demand’ services, the BBC launched iPlayer in 2007, and similar offerings have since been released by ITV, Channel 4 and Sky. TV has had particular challenges as advertising revenues shift online (see below), and the sector has seen a shift from employment in big organisations such as the BBC and ITV to the independent production sector.

Undoubtedly, the TV and Radio industries are going through one of the most profound periods of restructuring and challenge in its history, in the face of convergent media and changing audience tastes and behaviour. As content created for television broadcast is increasingly available on, and viewed via, the internet ‘content is king’ and audiences seek programmes and content rather than channels and schedules. This convergence and change is happening at a faster rate than predicted, adding structural challenges to those posed by the downturn in the economic climate. Falling advertising revenue has already impacted directly on the sector, with significant job losses and reductions of commissioning and learning and development budgets.

The UK has a strong heritage in IP creation in **Video, Film and Photography** – in the Film sector alone over the period 2001-2007, 30 of the top 200 films globally were based on stories and characters created by British writers, and British films account for 31% of UK box office receipts.[162] We have one of the most prodigious and highly respected Film industry’s in the world which brings with it innumerable secondary economic opportunities and benefits. The current economic climate has posed challenges as it has across the whole economy and 2008 was a mixed year for the industry. The UK box office grew to a record £850 million. UK films took 31% of the UK box office and internationally UK films accounted for 15% of the global box office. The upward trend in the performance of UK film in the global market was reflected in the 2007 export figures, which saw UK film exports reaching a record £1,050 million. This figure captures the exports of production services and income from royalties, underlining the UK’s international competitiveness.[163]

In total, the global market for all forms of **Animation** is currently estimated to be worth $300 billion per annum. The UK has a significant position in this market, but the UK’s animation

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[162] Statistical Yearbook, UK Film Council 2009

[163] Ibid

industry faces a number of challenges and opportunities that will affect its various sub-sectors in different ways. In particular, the decline in commissions from commercial broadcasters and the lack of a viable animated features market means that much of the industry revolves around VFX or Computer Games outlets, or motion graphics/promos, with stereo 3D and compositing skills desperately needed to stay competitive, as well as a greater pool of cross-platform savvy animation producers.

The **Facilities** sector supports and underpins the creative talent in the field of television and moving image production in the UK, and to a growing extent the creative talents of overseas producers, by providing specialised technical services, technology and their associated skilled personnel. The sector faces profound changes in its technology and overseas competition. Those involved in the sector, directly and indirectly, must ready themselves to compete globally and find new opportunities in the global digital market place. The lack of available financing due to the recent economic situation is causing increasing damage to the sector, with many companies unable to raise capital to invest in new equipment.

The **Interactive Media** industry, in particular, which has grown at twice the rate of the economy as a whole over the last decade and forecasts continued growth and demand, is now worth several billions of pounds annually; and is becoming ever more sophisticated. Bringing technical and creative talent together; to understand each other's language and skill-sets, to explore new types of content development, business models, legal and collaborative frameworks is the greatest challenge for industry.

The **Content for Computer Games** industry in the UK has the largest number of Content for Computer Games studios in Europe, with particular (yet waning) strength in console games, and is the fourth largest producer in the world after US, Canada and Japan.[164]

The **Photo Imaging** industry continues to be affected by the rapid pace of change in digital technology, with the impact of convergence being compared to the switch from film to digital capture of a decade ago. The widespread use of the internet for the exchange and delivery of information is the primary driver here, creating a huge requirement for bite size chunks of visual content, that need regular updating. The traditional end users of image content have expanded beyond that of editorial and print media to include web and mobile too, with devices such as the I-Pad opening up the market for innovative mixes of multi media content. Another main motivator of change within the photographic sector has been the emergence of hybrid digital DSLR cameras such as the Canon 5D and 7D or Nikon D90,

[164] Raise the Game, NESTA December 2008

which can produce both still and moving images. This demand for image content that can be used across a wide variety of platforms has highlighted the need for upskilling in technical subjects such as specific software packages and video training, as well as emphasising the need for strong sales and marketing skills to maximise the potential of these new audiences. How best to protect IP, manage copyright and monetise content continue to be ongoing challenges for the industry as a whole and these issues will only increase in complexity as the convergence market develops.

The **Publishing** industry, particularly newspapers, is adversely affected by the impact of the recession on advertising and consumer spending. At the same time, Publishing companies are key players in the information age, as drivers of the e-economy[165] and are making information available on an unprecedented scale. Google has made over half a million public domain books searchable online or downloadable. Creative Media distribution to electronic devices is growing, with content starting to appear for an ever widening set of devices - from the Kindle and Sony e-Book reader, to the publishing of Harper Collins' 100 Classic Book Collection for Nintendo DS. Tablets (e.g. iPad) and mobile smart phone technology are also anticipated to have a big impact on the industry.

The **Advertising** industry is an important player in the UK economy as well as a world leader, generating £5 billion annually for the UK economy. It is a sector which leads the way with cross-platform innovation as campaigns cross boundaries between TV, radio, print, billboard and interactive media. Job roles within advertising are varied and include copywriting, creative, media planning and buying, account management, production and client services. It's importance as a sector to the broadcast and print industries are crucial as Advertising funds the vast majority of commercial television, national press, magazines and commercial radio. Without advertising revenue the quality and quantity of programming and editorial would suffer.

[165] BIS, 2009 www.berr.gov.uk/whatwedo/sectors/publishing/index.html

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Skillset's Research Committee which guides the development of Skillset's Research Programme. Visit www.skillset.org/research/committee/article_7341_1.asp for a full list of membership.

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