



## **Television Sector – Labour Market Intelligence Profile**

### **1. Background**

Labour market data provided by the Office for National Statistics (ONS) do not provide the sectoral detail required by the Creative Media Industry and Skillset to identify and fill skills gaps and shortages<sup>1</sup>. As a result the industry charged Skillset in 1999 with generating Labour Market Intelligence (LMI) to a sectoral level throughout the four nations, where possible.

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

Major employers in the Television industry include BBC, ITV, Channel 4 as well as Cable & Satellite broadcasters such as BSkyB. Working within Independent Production are 'super-indies' such as RDF and All 3 Media though the bulk of this sector is made up of small SMEs.

### **2. Size of Sector<sup>2</sup>**

The Television sector comprises Broadcast Television (Terrestrial and digital/satellite/cable), Independent Production, Distribution and Video on demand, Community TV, DVD and Interactive Television.

Overall the TV industry comprises over 1,300 businesses which are shared as follows: those with public service broadcast commitments, namely, BBC One, BBC Two, ITV1, Channel 4 and 5<sup>3</sup>, around 300 Cable and Satellite Broadcasters and around 850 Independent Production companies and a number of interactive and community TV companies.<sup>4</sup> It is also important to note the TV industry's strong relationship with facilities companies, whose time is often shared between TV, film, and in some cases music and radio, and tend to be based in clusters close to TV companies. In addition, there are synergies between TV companies and those designing and distributing content through

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

<sup>2</sup> Unless otherwise specified, data in this section are taken from the Skillset 2009 Employment Census, which excludes film production, performers, photo imaging, publishing, advertising and freelancers not working on Census Day.

<sup>3</sup> These companies along with S4C, STV, UTV and Channel TV are collectively referred to as 'Terrestrial' TV companies in this document. This label was used in the classification and analysis of Skillset's Employment Census, Employer and Workforce surveys up to and including 2010.

<sup>4</sup> 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.

interactive, web-based and mobile applications other media via which content can be broadcast.

The TV industry is characterised by a small number of large businesses and a large number of small companies. Broadcasters such as the BBC and BSkyB dominate the landscape of larger businesses and increasingly smaller independent production companies are merging or being bought out by other independent production companies to form much larger businesses, for example, the Shine Group or Endemol. Just over a quarter (26%) of companies in the TV industry employs between 2 and 4 people and 23% employs between 5 and 10 people. 15% employs 11 to 20 people and 10% employs between 21 and 49 people. Just a tenth (10%) of the industry has 50 or more people working for them, which includes 4% with a workforce more than 200 strong.

In 2008 GVA for radio and TV combined totalled £3.2 billion which equates to 0.3% of UK GVA.<sup>5</sup>

A total of **50,150** people are employed in the TV industry. This is estimated to be just under a tenth (9%) of the entire Creative Media Industries workforce.<sup>6</sup>

During the period that Skillset has been carrying out its Employment Census, the TV industry workforce has grown steadily from 41,800 in 2000 up to 55,500 in 2006. Despite a slight increase in the size of the Independent Production workforce between 2006 and 2009 (from 20,950 to 21,700), the overall TV industry has decreased to 50,100. This is due to a decrease in workforce size within the Cable and Satellite TV and more significantly the Terrestrial TV sectors during the same time period. A full breakdown of trends in workforce size since 2000 is shown in **Table 1**.

**Table 1 Size of Television Workforce**

	2009	2006	2004	2003	2002	2001	2000
<b>TV (Total)</b>	<b>50,100</b>	<b>55,500</b>	<b>44,700</b>	<b>44,000</b>	<b>43,000</b>	<b>42,300</b>	<b>41,800</b>
Terrestrial TV	15,700	20,800	23,700	25,000	24,900	23,200	24,100
Cable & Satellite TV	12,700	13,700	6,100	5,300	4,900	5,500	6,100
Independent Production	21,700	20,950	14,900	13,600	13,300	13,600	11,600

Though to an extent sub-sectors of the TV industry draw from the same labour pool as well as that of other Creative Media sectors such as Film Production, at a given time the workforce can broadly be divided as follows: over two fifths in Independent Production (43%), 31% in Terrestrial TV, and a quarter in Cable and Satellite. In addition a relatively small amount of people are employed in Community TV and TV Distribution.

**Table 2** below illustrates the distribution of the workforce in TV by occupational group. More than 11,000 people in TV (22%) hold production roles and 10,000 people (20%) work in distribution, sales and marketing. The remainder of the workforce is distributed fairly evenly across the other occupational groups with notable employment in editorial, journalism and sport (9%), broadcasting and transmission (7%) and art and design (7%).

<sup>5</sup> DCMS Economic Estimates, December 2010.

<sup>6</sup> Data for Creative Media Industries as a whole taken from Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey, Labour Force Survey Jan - Dec 2010.

**Table 2 Distribution of the Television Workforce by Occupation**

Occupational Group	Television	Creative Media
Strategic Management	5%	5%
Creative Development	4%	2%
Production	22%	11%
Legal	2%	1%
Broadcast Management	5%	3%
Engineering and Transmission	7%	2%
Editorial, Journalism and Sport	9%	5%
Content Development	1%	1%
Art and Design	7%	9%
Animators	< 0.5%	3%
Costume/Wardrobe	1%	1%
Make-Up and Hair Dressing	1%	1%
Camera/Photography	3%	10%
Lighting	2%	2%
Audio/Sound/Music	2%	3%
Transport	< 0.5%	< 0.5%
Studio Operations	1%	< 0.5%
Technical Development	< 0.5%	3%
Editing	3%	2%
Laboratories/Processing	< 0.5%	5%
Manufacture	< 0.5%	1%
Servicing	< 0.5%	1%
Retail and Exhibition	1%	10%
Libraries and Archives	3%	2%
Distribution, Sales and Marketing	20%	2%
Business Management	< 0.5%	13%
Other	< 0.5%	2%

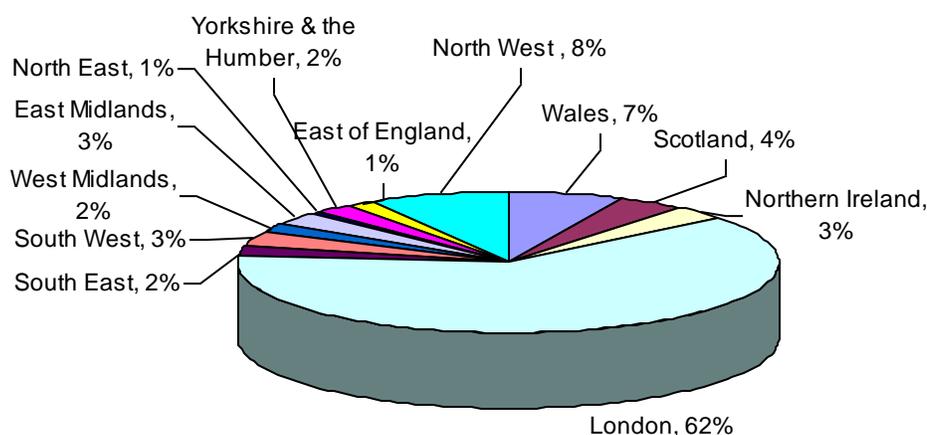
**Sources:** Creative Media - Skillset (2009) Employment Census, Skillset/UK Film Council (2008) Feature Film Production Workforce Survey and Skillset (2007) Photo Imaging Workforce Survey.

**Note:** Creative Media excludes publishing and advertising

Less than two thirds (62%) of the TV workforce is based in London, significantly more than the 38% of the wider Creative Media workforce.<sup>7</sup> The North West is the second largest centre of activity in England, with 8% of the workforce. Employment within the devolved nations is higher than the UK average (14% within TV compared to 11% of the wider Creative Media Industries), Wales being the largest employer (7%). The distribution across the remaining nations and English regions is spread relatively evenly as shown in **Figure 1**.

<sup>7</sup> Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey, Labour Force Survey Jan-Dec 2010.

**Figure 1 Distribution of the TV Workforce by Nation/English Region**



Since 2006 the distribution of the TV workforce has undergone small changes; most notably the proportion based in London falling from 66% in 2006 to 62% in 2009 and increasing in Wales from 4% to 7%.

A recent study carried out by NESTA maps the UK's creative clusters and shows that a large number of 'Television and Radio' (combined) firms are based around London, Manchester, Bristol, and outside of England in Cardiff and Glasgow. There is a significant presence in the South West of London. On a more local level additional 'creative agglomerations' are concentrated in London and its surrounding areas (Wycombe and Slough), Brighton, Bristol, Cardiff and the North of Wales and Scotland.<sup>8</sup>

### 3. Shape of the Sector

On the whole the TV industry relies heavily on freelancers<sup>9</sup>; 28% are freelance compared to 24% across the wider Creative Media industries.<sup>10</sup> The extent to which sub-sectors of the TV industry rely on freelancers varies considerably by sub-sector; over two fifths (44%) of the Independent Production workforce are freelance, this drops to under a fifth in Terrestrial Broadcast (19%) and a tenth in Cable and Satellite (11%). However, as shown in **Table 3**, the proportion of freelancers has decreased in Terrestrial Broadcast from 26% in 2006 to 19% in 2009, in Independent Production from 56% to 44% and in Cable and Satellite from 12% to 11%. The 2009 proportions are also lower than the corresponding figures for 2004. The decrease in the proportion of freelancers working in TV would appear to be contrary to the common conception that the workforce

<sup>8</sup> Creative clusters and innovation: Putting creativity on the map, NESTA, November 2010

<sup>9</sup> For the purpose of this document, and the sources of these data, as agreed by industry 'freelance' is defined as an individual with a contract of fewer than 365 days and an 'employee' is defined as an individual with a contract of 365 days or more. For how long the individual has been freelancing and the mode of payment is not taken into consideration.

<sup>10</sup> Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey and Labour Force Survey, January to December 2010. Excludes an unknown number of freelancers who would not have been working on Census day.

is becoming more fluid and casual. However, it is likely that the 2009 figures are reflective of the economic situation at the time.

**Table 3 Proportion of Freelancers in the TV Workforce in 2004, 2006 & 2009**

	2004	2006	2009
Terrestrial TV	20%	26%	19%
Cable & Satellite TV	23%	12%	11%
Independent Production	59%	56%	44%
All TV	33%	34%	28%

More than four fifths (84%) of TV employers use freelancers (higher than the Creative Media average of 50%). Employers in TV Production were more likely to employ freelancers than those in TV Broadcasting (87% vs. 80%).<sup>11</sup>

Just under a third (31%) of employers in the TV sector predict an increase in demand for freelance staff over the next 12 months, varying from 39% in TV Production to 16% in TV Broadcasting.<sup>12</sup>

The proportion of the TV workforce that had worked in more than one sub-sector or sector of the Creative Media Industries in the past 12 months varies by sub-sector. Just over a quarter (26%) of those working in Cable and Satellite had worked in another area in the past year, compared to 33% in Terrestrial TV and 39% in Independent Production.<sup>13</sup>

Representation of women in TV is greater than the wider Creative Media workforce at 41% compared with 39%, though still lower than the gender profile of the whole economy, which stands at around 47%.<sup>14</sup> The picture within sub-sectors of the TV industry varies; just under half of the workforce in Terrestrial TV (50%) are women, falling to 38% in Independent Production and 36% in Cable and Satellite.

As shown in **Figure 2**, overall this represents a continued decline in the proportion of women in the TV workforce, which stood at 49% in 2004, 45% in 2006 and 41% in 2009. This decline is reflected in each of the sub-sectors to varying degrees. The Cable & Satellite workforce experienced a significant decline from 57% in 2004 to 38% in 2006 and 36% in 2009. Female representation in the Independent Production workforce actually increased from 43% in 2004 to 46% in 2006 but has decreased to 38% in 2009. The proportion of women working In Terrestrial TV has remained fairly constant since 2004 (50%) through 2006 (50%) to 2009 (48%).<sup>15</sup>

<sup>11</sup> Skillset (2010) Creative Media Employer Survey

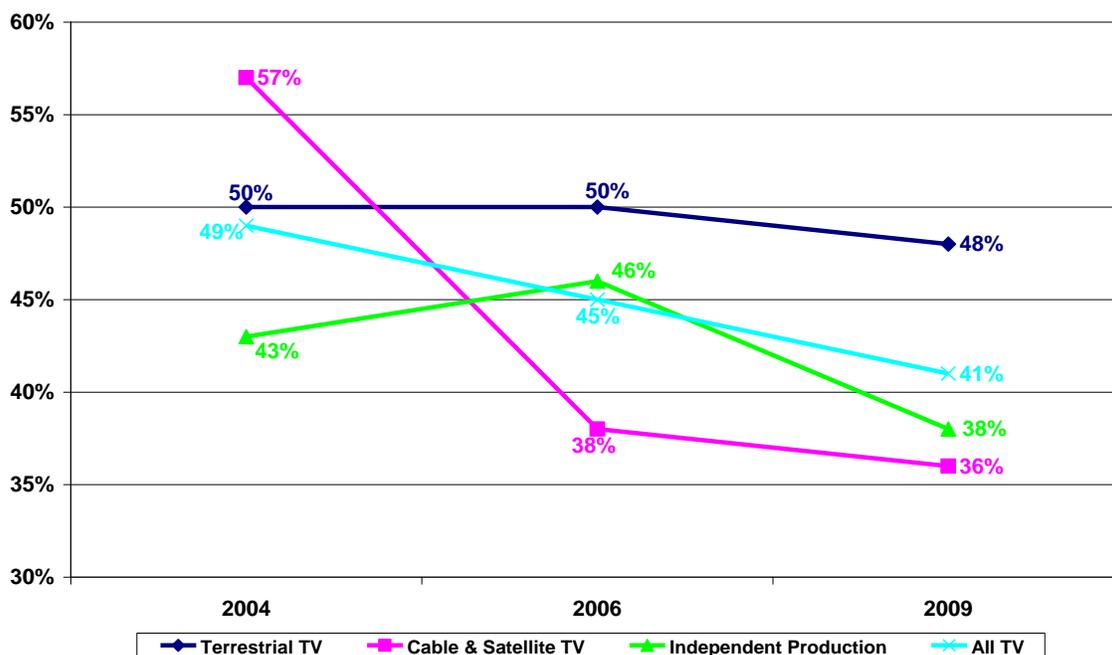
<sup>12</sup> Ibid

<sup>13</sup> Skillset (2010) Creative Media Workforce Survey

<sup>14</sup> UK economy from Labour Force Survey, January to December 2010; Creative Media from Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey, Labour Force Survey, January to December 2010

<sup>15</sup> Skillset (2009, 2006, 2004) Employment Census

**Figure 2 Proportion of Women Working in TV and the TV Sub-sectors in 2004, 2006 and 2009**



Just under a tenth (9%) of the TV workforce is from a Black and Minority Ethnic (BAME) background. This is higher than the proportion of BAME individuals in the wider Creative Media Industries (6%) and the same as that of the wider UK economy (9%).<sup>16</sup>

The proportion of BAMEs in the TV industry has dropped slightly since 2006 when they made up 10% of the workforce. Even so, the representation of BAMEs has actually increased in Terrestrial TV (from 7% in 2006 to 9% in 2009) and Independent TV (6% in 2006 to 7% in 2009). However, Cable and Satellite has experienced a significant fall in the representation of BAMEs from 20% in 2006 to 12% in 2009.

As the TV workforce is disproportionately located in London (62%), and this region has a higher proportion of its population from BAME groups, TV should also have a higher-than-average proportion of people from BAME groups. Across the UK economy in London 32% of the workforce are from a BAME background.<sup>17</sup> The proportion of those from a BAME background is 13% in London's TV industry.

Just 4% of the TV workforce consider themselves to be disabled as defined by the Disability Discrimination Act (DDA)<sup>18</sup>. This compares to 9% of individuals in the wider Creative Media workforce (as defined by the Disability Discrimination Act) and 15% of the wider UK economy (including both DDA disabled and work-limiting disabled).

<sup>16</sup> UK economy from Labour Force Survey, January to December 2010; Creative Media from Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey, Labour Force Survey, January to December 2010

<sup>17</sup> Labour Force Survey, January to December 2010

<sup>18</sup> Disability, as defined by the Disability Discrimination Act (DDA), covers many people who may not usually have considered themselves disabled. It covers physical or mental impairments with long term, substantial effects on ability to perform day-to-day activities.

Overall, the proportion of the TV workforce that consider themselves to be disabled is the same as in 2008 (4%), though slightly lower than in 2005 (5%).<sup>19</sup>

Amongst the TV Industry sub-sectors, Independent Production (3%) has the lowest proportion of disabled individuals. Terrestrial (5%) and Cable and Satellite (5%) TV have a slightly higher representation of disabled individuals. Since 2008 changes in the TV sub-sectors varies; Independent Production has remained constant at 3%, Terrestrial TV has decreased from 6% in 2008 to 5% in 2010 and Cable and Satellite has increased from 4% to 5%.<sup>20</sup>

Amongst the TV workforce, freelancers and employees are equally as likely to report a disability (both 4%).

Just under two thirds (64%) of the TV workforce is aged 35 or over, compared to 61% of the wider Creative Media workforce and 65% of the wider economy.<sup>21</sup> The proportion of the TV workforce aged 35 or over has changed little since 2008 (65%).

Amongst the TV Industry sub-sectors, the Terrestrial TV workforce has the highest proportion of individuals aged 35 or over (77%). Around three fifths of the workforce in Independent Production (59%) and just over a half in Cable and Satellite (52%) are aged 35+. Since 2008 the proportion of the Terrestrial TV workforce aged 35 or over has increased from 74% whereas the proportion in Independent Production and Cable and Satellite TV have fallen from 62% and 55% respectively.<sup>22</sup>

More than seven in ten (72%) men in the TV workforce are aged 35 and over, compared to 55% of women.<sup>23</sup> This pattern is similar to that across the wider Creative Media Industries, though the proportion of women aged over 35 is lower (49%) so is the proportion of men (66%).

Three tenths (30%) of the TV workforce have dependent children under 16 years, compared to 32% of the wider Creative Media workforce and 36% of the wider economy. This represents a slight increase since 2008 when 29% of the TV workforce had dependent children

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<sup>19</sup> TV from Skillset (2010) Creative Media Workforce Survey; UK economy from Labour Force Survey, January to December 2010; Creative Media from Skillset (2010) Creative Media Workforce Survey and Labour Force Survey, January to December 2010

<sup>20</sup> Skillset (2010 & 2008) Creative Media Workforce Survey

<sup>21</sup> TV from Skillset (2010) Creative Media Workforce Survey; UK economy from Labour Force Survey, January to December 2010; Creative Media from Skillset (2010) Creative Media Workforce Survey and Labour Force Survey, January to December 2010

<sup>22</sup> Skillset (2010 & 2008) Creative Media Workforce Survey

<sup>23</sup> Skillset (2010) Creative Media Workforce Survey

There is some variation in the prevalence of dependent children by TV sub-sector; 34% in Terrestrial TV (up from 32% in 2008), 29% in Independent Production (up from 27% in 2008) and 22% in Cable and Satellite (down from 26% in 2008).<sup>24</sup>

**Table 4 Diversity of the TV Workforce**

	Women	BAME	Disabled	35+	Dependent Children
<b>TV (Total)</b>	41%	9%	4%	64%	30%
Terrestrial TV	48%	9%	5%	77%	34%
Cable & Satellite TV	36%	12%	5%	52%	29%
Independent Production	38%	7%	3%	59%	22%
<b>Creative Media</b>	39%	6%	9%	61%	32%
<b>UK economy</b>	47%	9%	15%	65%	36%

#### 4. Recruitment, Working Patterns and Career Development

Amongst TV employers who have recruited in the last 12 months, over two fifths (42%) recruited from other Creative Media Industries compared to 43% that recruited from outside of the Industries (28% and 41% respectively amongst all Creative Media employers). Employers in TV Broadcasting (63%) are significantly more likely than those in TV Production (31%) to recruit from other Creative Media Industries.<sup>25</sup>

Three fifths (60%) of TV employers recruit direct from education (whether school, college or university). This is significantly higher than the proportion of all Creative Media employers (45%). TV Broadcasting (66%) employers are more likely than TV Production (56%) employers to recruit direct from education.<sup>26</sup>

Three tenths (30%) of the TV workforce heard about their first job in the industry via an advertisement (slightly less than 31% of the wider Creative Media workforce). However, acquiring a job through informal channels was also common reflecting the TV industry's reliance on such methods; 22% heard about it from a friend or relative (16% of the wider Creative Media workforce), 21% made contact with the company (18% of the wider Creative Media workforce) and 12% heard about it directly from an employer (10% of wider the Creative Media workforce). It would appear that recruitment methods remain unchanged in the TV industry as in 2008, 21% of the TV workforce made direct contact with an employer, 22% heard about the role via a friend or relative and 12% were contacted directly by an employer.<sup>27</sup> In addition, of those employers offering workforce experience /placements (which often leads to further employment) 87% organised them through personal contact with individuals.<sup>28</sup>

<sup>24</sup> TV from Skillset (2010 & 2008) Creative Media Workforce Survey; UK economy from Labour Force Survey, January to December 2010; Creative Media from Skillset (2010) Creative Media Workforce Survey and Labour Force Survey, January to December 2010

<sup>25</sup> Skillset (2010) Creative Media Employer Survey

<sup>26</sup> Ibid

<sup>27</sup> Skillset (2010 & 2008) Creative Media Workforce Survey

<sup>28</sup> Skillset (2010) Creative Media Employer Survey

5% of the TV workforce started work in the industry between 2009 -2010, a further 32% started in 2000-2008. Three in ten (31%) started in the 1990s, two in ten (20%) in the 1980s and the remaining 12% in the 1970s or earlier. This profile is very similar to the wider Creative Media Industries. Individuals working in Terrestrial TV (8%) are less likely to have started work in the industry since 2007 compared to Cable and Satellite (17%) and Independent Production (18%).<sup>29</sup>

The average working week consists of 4.8 days for the TV workforce, very similar to the 4.7 days reported in 2008 and the same as the average across the Creative Media Industries as a whole. Those working in Independent Production have a longer average working week than those working in the other TV sub-sectors (4.9 days, compared to 4.6 in Terrestrial TV and 4.7 in Cable and Satellite).<sup>30</sup>

The average working day for those in TV is longer with a reported average of 9.5 hours per day compared with 8.7 hours across the wider Creative Media workforce. Those working in Independent Production again report a longer average working day of 9.8 hours. The Terrestrial TV workforce report an average working day of 9.4 hours and Cable and Satellite 9 hours. The overall TV average of 9.5 hours represents a drop from 9.6 hours in 2008 and 9.9 hours in 2005.<sup>31</sup>

Eight in ten (80%) members of the TV workforce have done all of their work over the past 12 months in the UK. This compares to 75% of the wider Creative Media Industries. Those working in Cable and Satellite TV (84%) and Terrestrial TV (83%) were more likely than those working in Independent Television (76%) to be based solely in the UK.<sup>32</sup>

The average income received by the TV workforce in 2010 stands at £36,200. It is highest within Terrestrial TV where the average reported income is £38,900. The Cable and Satellite workforce has an average income of £34,800 and the Independent Production average stands at £35,300. The average income received by the overall TV workforce is almost identical to that reported in 2008 (£36,300) and is higher than the average received by the Creative Media workforce as a whole at £30,500.

Permanent employees in the TV industry have a higher average income than those working as freelancers (averages of £38,100 and £30,900 respectively).<sup>33</sup>

Around two fifths (38%) of the TV workforce have undertaken unpaid work within the Creative Media Industries (excluding an occasional charitable contribution). This is lower than the corresponding figure from 2008, when 47% of the workforce reported having undertaken unpaid work. This reflects a significant drop in the proportion undertaking unpaid work across the sub-sectors of the TV industry; Cable and Satellite down from 45% in 2008 to 26% in 2010, Independent Production down from 56% to 49% and Terrestrial TV down from 40% to 34%.

The extent of unpaid work also varies by contract type, with 61% of TV freelancers having worked unpaid compared with 52% of TV employees.<sup>34</sup>

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<sup>29</sup> Skillsset (2010) Creative Media Workforce Survey

<sup>30</sup> Skillsset (2010 & 2008) Creative Media Workforce Survey

<sup>31</sup> Skillsset (2010 & 2008 & 2005) Creative Media Workforce Survey

<sup>32</sup> Skillsset (2010) Creative Media Workforce Survey

<sup>33</sup> Skillsset (2010 & 2008) Creative Media Workforce Survey

As shown in **Table 5**, a quarter (25%) of the TV workforce plan to move to a different job within the Industry in the next 12 months. A further 9% plan to move job but to a different Creative Media Industry and another 7% plan on leaving the Creative Media Industries altogether. Trends are similar amongst the wider Creative Media workforce. Those working in Cable and Satellite (33%) are particularly likely to anticipate a new job within the same industry.

Interestingly more than a fifth of the TV workforce (22%) plan to broaden the scope of freelance work in the coming 12 months. This is a change anticipated across all TV sub-sectors.

**Table 5 Anticipated changes to career in the next 12 months**

Change in next 12 months	TV Workforce	Creative Media Workforce
Move to a different job in same Industry	25%	20%
Move to a different job in different Creative Media Industries	9%	8%
Move to a different job outside Creative Media Industries	7%	7%
Become freelance	9%	9%
Broaden scope of freelance work	22%	27%
Change direction of freelance work	12%	14%
Expect to be made redundant	8%	7%
Temporarily leave current role (e.g. maternity leave or career break)	6%	5%

Reasons given for leaving the Creative Media Industries altogether primarily cited ‘a lack of promotion or career development opportunities’, ‘low pay rates’, ‘a decline in opportunities in the sector as a result of the recession’ and ‘not liking the culture of their current organisation’ as reasons for doing so. These reasons were also the most commonly cited amongst the wider Creative Media Industries.<sup>35</sup>

## 5. Qualifications in Sector<sup>36</sup>

The TV workforce is highly qualified, 63% has a degree compared to 57% of the wider Creative Media workforce and 37% of the wider UK economy. However, this figure is significantly lower than in 2008 (71%). This pattern is reflected in the TV sub-sectors; the proportion of graduates in Terrestrial TV falling from 69% in 2008 to 57% in 2010, Independent Production from 71% to 68% and Cable and Satellite TV from 72% to 70%.

<sup>34</sup> Ibid

<sup>35</sup> Skillset (2010) Creative Media Workforce Survey

<sup>36</sup> Unless otherwise stated all data in this section is from the following sources: TV from Skillset (2010 & 2008 & 2005) Creative Media Workforce Survey; UK economy from Labour Force Survey, January to December 2010; Creative Media from Skillset (2010) Creative Media Workforce Survey and Labour Force Survey, January to December 2010

There is very little difference between the proportion of freelancers and employees working in the TV industry that hold a graduate qualification (62% and 63% respectively).

Of those members of the TV workforce who hold an undergraduate degree or diploma 35% have a qualification in Media Studies or a related subject (varying from 42% in Cable and Satellite TV, to 34% in Independent Production and 33% in Terrestrial TV). The vast majority (68%) hold a qualification in some other subject. In the wider Creative Media workforce a smaller proportion hold a Media Studies or related degree (28%).

After initially increasing, the proportion of degrees that are media related has decreased in the last couple of years. In 2005, 40% of degrees held were media related, this increased to 46% in 2008 but has now fallen to 35%. There have also been significant decreases across the TV sub-sectors.

The most common media related subjects amongst the TV workforce are: Media Design/ Media Production/Broadcasting (29% of those with a media related degree) and Media/Communication Studies (25%). The most common subjects in other areas are: Languages, Literature and Culture of the British Isles (13% of those with a degree in some other subject), Crafts, Creative Arts and Design (12%) and History (10%).

Graduates came from a wide variety of institutions with the University of Cambridge (4%) the most common followed by the University's of Bournemouth, Northumbria and Aberystwyth (all 3%).

As shown in **Table 6** after those educated to degree level or above the highest qualification most commonly attained was a technical or vocational qualification (12%). A trade Apprenticeship was the highest qualification attained for less than 1% of the workforce.

**Table 6 Qualifications of the TV Workforce**

	Terrestrial TV	Cable & Satellite TV	Independent Production	TV (All)	Creative Media
A postgraduate qualification	16%	23%	23%	21%	31%
An undergraduate degree, certificate or diploma	41%	37%	45%	42%	37%
A Foundation degree	1%	1%	2%	2%	1%
A technical or vocational qualification e.g. HND or HNC	15%	13%	9%	12%	9%
A' level/GNVQ in Media Studies or related subjects	4%	5%	>0.5%	3%	2%
GCSE/O Level (or equivalent) in Media Studies or related subjects	2%	>0.5%	1%	1%	1%
National/Scottish Vocational Qualification (N/SVQ)	2%	6%	1%	3%	1%
Modern Apprenticeship/Apprenticeship	>0.5%	>0.5%	>0.5%	>0.5%	>0.5%
None of the above	17%	8%	16%	14%	16%

A majority of TV employers (44%) report that they do not value formal qualifications. Meanwhile three in ten (32%) value undergraduate degrees, certificates or diplomas; 19% value technical or vocational qualification, and 17% value postgraduate qualifications. A small proportion of employers value other types of qualifications such as Foundation Degrees (7%), NVQs (5%) and Apprenticeships (4%). Interestingly, employers working in Broadcast TV are significantly more likely to value formal qualifications than those in TV Production; for example, undergraduate degrees, certificates and diplomas are valued by 48% in TV Broadcasting compared to 23% in TV Production.<sup>37</sup> In contrast to this finding which suggests employers place little value on formal qualifications is the high level of graduate employment that currently exists within the workforce (63% are graduates as reported above).<sup>38</sup> This discrepancy might be attributable to a perception among employers that qualifications do not necessarily make new recruits to the sector 'job ready'. Recent research by Skillset into the destination of 2007/08 graduates also suggests that the likelihood of HE graduates finding employment within the Creative Media Industries within six months of graduation increases for students who have undertaken industry-specific courses.<sup>39</sup> It is difficult to say whether this is supply or demand driven as the process of recruitment is influenced by a complex set of factors including individual employer values and current labour market circumstances.

Amongst those employers who value graduate qualifications, three in ten (28%) stated a preference for these qualifications to be in media studies or a related subject,

<sup>37</sup> Skillset (2010) Creative Media Employer Survey

<sup>38</sup> Skillset (2010) Creative Media Workforce Survey

<sup>39</sup> 10% of employed HE graduates from 2007/08 who undertook Skillset-relevant courses found employment within Skillset industries, compared to 3% of all HE graduates who have found employment in Skillset industries. This increased to 34% for employed HE graduates of Skillset-accredited courses. DLHE Survey, HESA 2007/08 from Skillset/Research As Evidence (October, 2010)

significantly lower than the wider Creative Media average of 40%. Just 10% preferred a non-media subject and a further 58% did not have a preference.<sup>40</sup>

## 6. Supply and Provision of Learning and Development in Sector

In HE: 6,020 TV-relevant courses exist across the UK and these courses were being studied by 125,152 students<sup>41</sup> in 2008/09. An above average proportion of these learners are female (59%), whilst 10% are BAME and 14% had an identified disability. In 2008/09 40,193 individuals attained a TV related qualification (consisting of 7,423 Postgraduate, 27,504 first degrees, 1,382 foundation degrees and 3,883 other undergraduate qualifications).<sup>42</sup>

In FE: we have identified 756 learning aims that are in some way relevant to the TV sector and these account for 312,448 learners in England in 2008/09 (second only to Film in the Creative Media Industries). 45% of these learners are female, 14% are BAME and 12% had an identified disability.<sup>43</sup>

In the private sector: Of the 25 providers supplying usable information regarding provision to the TV sector a total of 560 courses were identified. These courses most commonly covered Broadcast Journalism, TV Writing and Project Management (specific to Management and Leadership). Specific skills covered commonly included TV Pitching Skills, Creative Development and Post Production Workflows.<sup>44</sup>

### *Perspective of Employers<sup>45</sup>*

Approaching two-thirds (64%) of Television employers fund or arrange learning or development for staff, compared to 47% of employers across the Creative Media Industries. This represents a substantial increase from the 51% providing learning or development in 2006.<sup>46</sup> There was slight variation between TV Broadcasters (including Terrestrial, Cable & Satellite and Distributors - 69%) and TV Production companies (61%). Three quarters (76%) of TV employers who use freelancers also extend learning and development opportunities to them, significantly higher than the 59% across the wider Creative Media Industries.

Amongst employers offering learning and development to staff, the majority favour sending staff out to an external course or seminar (81%). Structured support on the job by another member of your workforce e.g. mentoring, coaching (64%) and ad-hoc non-

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<sup>40</sup> Skillset (2010) Creative Media Employer Survey

<sup>41</sup> The student count is the number who are studying courses whether in the first, middle, or final years of study. Both full time and part time students are included.

<sup>42</sup> Figures from HESA 2008/09 quoted in Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Training Provision in FE, HE, and the Private Sector in the UK.

<sup>43</sup> Figures from Individual Learner Record (ILR) 2008/09 for England only quoted in Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Training Provision in FE, HE, and the Private Sector in the UK.

<sup>44</sup> Skillset/Research As Evidence (October, 2010) Mapping Creative Media and Fashion & Textiles Relevant Education and Training Provision in FE, HE, and the Private Sector in the UK

<sup>45</sup> Unless otherwise stated all data in the 'Perspective of Employers' sub-section are from Skillset's (2010) Creative Media Employer Survey.

<sup>46</sup> Skillset (2006) Employer Survey

structured support on the job by another member of their workforce (60%) are also common methods of delivery. In-house training sessions using an external contractor (52%) and in-house training sessions conducted by another member of your workforce (51%) were also relatively popular methods, with books and other printed material (40%) a less popular option. Employers in TV Broadcasting (87%), like many other employers including TV Production (77%), favoured sending staff out to an external course or seminar but unlike other sectors were also very likely to opt for Internet based/online training (60%).

A third (33%) of TV employers have a learning and development plan for the year ahead (significantly higher than the wider Creative Media Industries – 18%). Over half (52%) of employers in TV Broadcasting have such a plan, much higher than the 23% in TV Production.

Over half (55%) of TV employers have seen no change to their learning and development budget over the past year. 15% had seen an increase, whilst a slightly higher proportion (18%) had actually seen a decrease in their learning and development budget. These figures are all similar to those found across the wider Creative Media Industries (64% stayed the same; 12% decreased and 16% increased) though the proportion that have seen a decrease is notably higher. TV Production employers were slightly more likely to have experienced an increase in budget over the past year (16%) compared to those in TV Broadcasting (14%).

Skillset's (2010) Creative Media Employer Survey investigated employer usage of Apprenticeships, graduate internships and work placements/work experience posts. 16% of TV employers offer Apprenticeships, whilst 44% would consider doing so in the future. This marks a significant increase since 2006 when just 6% of employers offered Apprenticeships, whilst 33% would consider doing so.<sup>47</sup> The proportion of employers offering apprenticeships is notably higher than across the wider Creative Media Industries (9%). Employers in TV Broadcasting 17% are slightly more likely than those in TV Production to offer Apprenticeships though high proportions in both would consider offering them in the future (41% and 47% respectively).

Graduate internships were more than twice as likely as Apprenticeships to be offered by TV employers (34%). In addition, another 32% would consider offering an internship. The proportion of employers offering internships is significantly higher than across the wider Creative Media Industries (18%). TV Broadcasting employers were again the most likely sub-sector to offer graduate internships (39%).

Almost nine in ten (88%) TV employers offer or would consider offering work placements or work experience posts. This includes 67% of employers that already offer work placements/work experience posts, a similar proportion as in 2006 (71%)<sup>48</sup>. Over two thirds of employers in TV Broadcasting (68%) and TV Production (66%) already offer work placements/work experience posts.

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<sup>47</sup> Skillset (2006) Employer Survey

<sup>48</sup> Ibid

### *Perspective of Workforce*<sup>49</sup>

Almost six in ten (58%) of the TV workforce had undertaken some form of learning and development in the past 12 months compared to 56% of the wider Creative Media workforce. This denotes very little change from the 55% in 2008 and 57% in 2005 that had received some form of learning and development in the past 12 months. In 2010 this varied from 63% in Terrestrial TV to 56% in Independent TV and 55% in Cable and Satellite TV.

Two thirds (66%) of permanent employees working in the TV industry had received some training in the past 12 months, compared to just 38% of freelancers.

Those in the TV workforce who had undertaken learning or development over the past 12 months had completed an average of 14.9 days of learning and development during this time (lower than the Creative Media average of 19.6 days). This is significantly higher than the average of 5.1 days in 2008 and 5.3 days in 2005.<sup>50</sup> Individuals in Independent Production received the greatest number of days in learning and development on average (24.3 days) compared with an average of 9.6 days in Cable and Satellite and 6.9 days in Terrestrial TV.

Freelancers in receipt of training in the past 12 months received an average of 14.8 days, compared to the 14.9 days received by employees.

**Table 7** lists the ten most common areas in which learning and development had been received in the past 12 months. Computer skills in a variety of specific software packages was a subject undertaken by 19% of the workforce (particularly those in Cable and Satellite TV – 31%). This was followed by health and safety (16%), equipment skills (9%), management and leadership (9%) and rules, regulations and legal (9%). In comparison, the most common areas of learning and development reported in 2008 were health and safety (19%), specific software packages (16%), editing (14%), camera (11%) and production (10%).

Learning and development received also varies by TV sub-sector. Learning and development of computer skills in specific software packages is common across the sub-sectors though this ranges from 31% of individuals in Cable and Satellite TV to 15% in both Terrestrial TV and Independent Production. However, the most common subject in Terrestrial TV and Independent Production is health and safety (17% and 18% respectively).

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<sup>49</sup> Unless otherwise stated all data in the 'Perspective of Workforce' sub-section are from Skillset's (2010) Creative Media Workforce Survey.

<sup>50</sup> These differences may in part be due to a change in question text in the 2010 survey. Learning and development now being referred to in questions rather than 'training' which was used in 2008 and 2005. A note was added in the 2008 survey to include all types of structured self-tuition and on-the-job training so differences should be minimised.

**Table 7 Most common areas of learning and development undertaken in the past 12 months**

Subject	All TV	Terrestrial TV	Cable & Satellite	Independent Production
Specific Software Package(s)	19%	15%	31%	15%
Health & Safety	16%	17%	11%	18%
Equipment skills – specific tool(s)	9%	11%	7%	7%
Management & Leadership	9%	8%	15%	6%
Rules, Regulations & Legal	9%	10%	7%	8%
General Technical or Craft Skills	8%	11%	5%	8%
Business Development & Commercial Awareness	7%	7%	6%	8%
Specific Technical or Craft Skills	5%	6%	>0.5%	6%
Editing	4%	11%	>0.5%	1%
Library/Archives/Research/Indexing	4%	1%	11%	3%

Over half of the TV workforce who had received learning or development in the past year had done so via their employer (56%, compared to 49% within the wider Creative Media workforce). A further 37% had received learning or development via a private training provider (lower than the 39% of the wider Creative Media workforce). One in ten had received learning or development from a trade association or membership organisation (10%, compared to 15% across the Creative Media Industries). Those working in Terrestrial TV were particularly likely to receive learning or development via their employer (73%) compared to 48% in Cable and Satellite TV and 47% in Independent Production.

The most common delivery mode for the learning and development received by the TV workforce was via the classroom (59%). This was also the most significant mode across all of the sectors though significantly more so for those in Independent Production (68%) compared to Terrestrial TV (53%) and Cable and Satellite (52%). In addition, the use of online support reference material such as chat rooms and online books was significantly more likely in Independent Production (19%). In contrast, the use of on the job learning and development such as mentoring was over one and a half times more likely in Terrestrial TV (47%) and Cable and Satellite (48%) than in Independent Production (28%).

Approaching two fifths (38%) of the TV workforce look for information on learning and development via internet searches. Fellow colleagues are also a major source of information in the sector (35% citing them as a source of information). A further third (34%) seek information through their company intranet, 29% cite company training/HR department, 27% their manager and 23% Skillset. These patterns are fairly consistent across all industry sub-sectors though the use of company intranet was the most common source of information for those working in Terrestrial TV (52%).

#### *Barriers to Learning/Development*

Half (50%) of TV employers said that there were particular reasons preventing them from providing more learning and development for their workforce (the same proportion

as found amongst employers in the wider Creative Media Industries). The most frequent reasons cited include 'your company cannot afford to invest in training' (52%), 'not enough time' (40%) and 'employees are already fully proficient' (38%).<sup>51</sup> The proportion of employers reporting barriers to providing learning and development in 2006 was slightly higher than in 2010 at 57%. As in 2010, the most frequent reasons cited were 'too costly' (58%) and 'not enough time' (39%).<sup>52</sup>

As shown in **Table 8**, more than eight in ten (83%) of the TV workforce who had tried to access learning or development or information regarding it have experienced barriers to access. This figure is slightly less than the wider Creative Media workforce (88%) and marks a decrease from the 89% recorded amongst the TV workforce in 2008, the 88% reported in 2005 and 86% in 2003.<sup>53</sup>

As in 2008 the most common obstacle cited was that fees were too high, reported by 39% of the TV workforce, followed by employers not being willing to pay for learning and development, and that opportunities were available at inconvenient times (both 24%).<sup>54</sup>

The Cable and Satellite TV workforce are the least likely to have experienced barriers to learning and development (71%), compared to Terrestrial TV and Independent Production (86% and 88% respectively). Individuals working in Independent Production (53%) were significantly more likely to report that 'fees are too high' as a barrier to training than those in Terrestrial TV (25%) or Cable and Satellite (29%).<sup>55</sup>

The difference in barriers faced by freelancers and employees within the TV sector is vast (as found in the wider Creative Media industries). Virtually all (92%) freelancers working within the TV industry have experienced barriers to training, compared to 80% of employees. The majority of barriers, except for those specifically relating to employers willingness to pay for and allow time off for training, were more likely to have been experienced by freelancers than employees. Freelancers were twice as likely to report that fees were too high (60% of freelancers compared to 31% of employees). Another understandably obvious concern for freelancers being the fear of losing work through committing time in advance (a barrier mentioned by 40% of TV freelancers).<sup>56</sup>

**Table 8 Barriers to Learning/Development**

<b>Barrier to Training</b>	<b>Broadcast TV</b>	<b>Cable &amp; Satellite</b>	<b>Independent Production</b>	<b>ALL TV</b>	<b>Creative Media</b>
<i>Any barriers or obstacles</i>	86%	71%	88%	<b>83%</b>	88%
Lack of suitable courses/training in UK	13%	9%	10%	<b>11%</b>	12%
Lack of suitable opportunities in the region/nation I live/work	30%	14%	20%	<b>21%</b>	19%

<sup>51</sup> Skillset (2010) Creative Media Employer Survey

<sup>52</sup> Skillset (2006) Employer Survey

<sup>53</sup> Skillset (2010, 2008, 2005 & 2003) Creative Media Workforce Survey

<sup>54</sup> Skillset (2010) Creative Media Workforce Survey

<sup>55</sup> Skillset (2010) Creative Media Workforce Survey

<sup>56</sup> Ibid

<b>Barrier to Training</b>	<b>Broadcast TV</b>	<b>Cable &amp; Satellite</b>	<b>Independent Production</b>	<b>ALL TV</b>	<b>Creative Media</b>
Possible loss of earnings too high a risk	12%	3%	13%	<b>10%</b>	10%
Fees are too high	25%	29%	53%	<b>39%</b>	46%
Opportunities available are in inconvenient places	16%	14%	25%	<b>20%</b>	19%
Opportunities available are at inconvenient times	31%	2%	32%	<b>24%</b>	18%
Domestic/personal arrangements	14%	7%	15%	<b>13%</b>	11%
Fear of losing work through committing time in advance	14%	12%	22%	<b>17%</b>	16%
Lack of available information	9%	1%	17%	<b>11%</b>	16%
Lack of availability of materials online	8%	21%	8%	<b>11%</b>	9%
Difficult to assess the quality of courses	15%	7%	32%	<b>21%</b>	27%
Employers not willing to pay	25%	15%	28%	<b>24%</b>	25%
Employers not willing to give time off for learning and development	24%	19%	15%	<b>19%</b>	21%

## 7. Skills Shortages

Just under a third (32%) of TV employers have current vacancies, and of these employers three in ten (31%) report having hard to fill vacancies and hence skills shortages (varying from 22% of TV Broadcasters to 43% of TV Production companies). The TV average is actually lower than the Creative Media employer average of 46%.<sup>57</sup> The occupation in which these skills shortages exist most commonly is Production (for 38% of TV employers).

TV employers also highlighted a number of skills that they found difficult to obtain in applicants direct from education. Broad skills areas most commonly cited are leadership and management (32%), creative talent (23%), sales and marketing (22%), multi-skilling (20%) and skills in using sector specific software packages (19%).<sup>58</sup>

Other evidence also highlights specific shortages in the following areas:

- A shortage of skills in special effects generation (which is also a problem in the context of the film sector);
- A shortage of leadership and management skills within independent production companies cited as a learning and development need by 13% of the workforce.<sup>59</sup>

<sup>57</sup> Skillset (2010) Creative Media Employer Survey

<sup>58</sup> Ibid

<sup>59</sup> Skillset (2010) Creative Media Workforce Survey

- A shortage in higher level business skills, including management and leadership, amongst senior executives (e.g. in securing multi strand funding packages and brand sponsorship for commercial TV projects);
- A shortage in entrepreneurial skills (and confidence) both in terms of those employed at various levels within the industry, and also amongst freelancers, particularly freelancers who may have been forced to take this route as a result of redundancy.<sup>60</sup>
- A shortage of new graduates into the industry with the ability to develop strong stories for Television drama, though journalistic skills remain well supplied.

More than eight in ten (84%) TV employers that reported hard to fill vacancies have taken specific actions to overcome skills shortages. For the majority of these employers this commonly meant using new recruitment methods or channels (50%) or skilling up the existing workforce to take on some of the responsibility (46%). Both of these actions are significantly more likely to be undertaken by employers in TV Broadcasting than in TV Production.<sup>61</sup>

There is also an increased need for multi-skilling related to 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.

## 8. Skills Gaps

### *Perspective of Employers<sup>62</sup>*

A third (32%) of TV employers report a skills gap within their current workforce, with little variation by sub-sector and only slightly higher than the Creative Media employer average (28%). This does however mark an increase from 2006 when 26%<sup>63</sup> of TV employers reported a skills gap in their current workforce.

More than half of TV employers highlighted leadership and management (53%), and sales and marketing (53%) as broad areas in which skills gaps exist amongst employees. Creative talent (40%), skills in using sector specific software packages (32%) and technical skills (32%) were also highlighted as skills gap areas by between three and four in ten TV employers. Within the broad category of 'technical skills' – editing, TV/video production, camera and sound were the most common specific areas of skills gaps.

Amongst freelancers the areas of skills gaps reported are very similar. TV employers most frequently mentioned skills gaps relating to sales and marketing (36%), skills in

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<sup>60</sup> Skills Review: A Skills Review for the TV and Radio Sector: A Report for Skillset, Ofcom and BTRC (May 2009)

<sup>61</sup> Skillset (2010) Creative Media Employer Survey

<sup>62</sup> Unless otherwise stated all data in the 'Perspective of Employers' sub-section are from Skillset's (2010) Creative Media Employer Survey.

<sup>63</sup> Skillset (2006) Employer Survey

using sector specific software packages (32%), leadership and management (30%), creative talent (29%) and technical skills (28%). Again camera, sound and editing were the most frequently mentioned types of technical skills.

Skills gaps amongst their current workforce were most frequently associated with strategic management (43%) and production (29%) roles for employees and production (42%) roles for freelancers.

TV employers reporting a skills gap specified a range of affects on the company as a result. Over half (55%) reported that they have had to delay developing new products or services. Furthermore, 47% stated that they had needed to outsource work they'd prefer to keep in house and 44% were facing increased operating costs. These issues were prevalent in both TV Broadcasting and TV Production though notably more so in the latter.

Nearly three quarters (73%) of TV employers are taking steps to overcome the skills gaps they are facing. Most commonly this takes the form of skilling up the existing workforce to take on some of the responsibility (75%). In addition, around three fifths (61%) of employers are increasing or expanding trainee programmes and half (50%) are re-defining existing jobs.

#### *Perspective of Workforce<sup>64</sup>*

Over half (52%) of the TV workforce have current learning or development needs. Over a third (35%) do not have any needs and the remaining 13% said that they do not know. There could be a variety of reasons behind an individual not being clear on their own development needs, including possible employer input into their learning and development plans, current/impending changes to their job role or lack of clarity over skills required for their role/a particular task. This pattern is fairly similar across the TV sub-sectors though the Independent Production (59%) workforce is more likely to have a learning or development need than Terrestrial TV (48%) or Cable and Satellite (47%). Across the wider Creative Media Industries, 54% of the workforce have learning or development needs.

As noted over half of the TV workforce have current learning or development needs in 2010. As shown in **Table 9**, this is very similar to the 53% reported in 2008 though lower than both the three fifths (60%) of the TV workforce reporting a learning or development need in 2005 and the two thirds (64%) in 2003.

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<sup>64</sup> Unless otherwise stated all data in the 'Perspective of Workforce' sub-section are from Skillset's (2010, 2008, 2005 & 2003) Creative Media Workforce Survey.

**Table 9 % of Workforce with Learning or Development Need**

	<b>2010</b>	<b>2008</b>	<b>2005</b>	<b>2003</b>
<b>Broadcast TV</b>	48%	52%	58%	63%
<b>Cable and Satellite</b>	47%	51%	67%	72%
<b>Independent Production</b>	59%	54%	60%	63%
<b>All TV</b>	52%	53%	60%	64%
<b>All Creative Media</b>	54%	51%	62%	64%

Freelancers in the TV industry (54%) are slightly more likely than employees (52%) to report a training need. Despite this trend also being apparent in 2008, the difference between freelancers and employees has decreased.

**Table 10** lists the ten most common areas of learning and development needed as reported by the TV workforce. Computer skills in a variety of specific software packages (21%) was the most common subject needed. Management and leadership skills (12%) and business development and commercial awareness (11%) were also common, particularly within the Cable and Satellite sub-sector. A range of other subjects were specified as shown in the following table, but it is worth highlighting the higher level of requirement for directing (10%) and editing (10%) skills by the Independent Production workforce and the need for camera skills within Terrestrial TV (15%).

The areas of learning and development need most commonly cited by the TV workforce in 2008 were editing (16%), specific software applications (14%), camera (13%), management/leadership (13%), new/digital technology (11%) and production (10%). Though there are some changes between these and those reported in 2010 it is clear that skills needed have remained similar.

**Table 10 Most common areas of learning or development needed**

Subject of training	TV Total	Terrestrial TV	Cable & Satellite	Independent Production
Computer Skills - Specific Software Package(s)	21%	23%	19%	20%
Management and Leadership Skills	12%	8%	15%	13%
Business Development & Commercial awareness	11%	5%	20%	10%
Design and Creation or Repurposing of Content Across Platforms	10%	12%	2%	12%
Technical or Craft Skills - Specific Form(s)	8%	8%	5%	10%
Camera	8%	15%	1%	8%
Technical or Craft Skills - General	7%	5%	6%	9%
Directing	7%	9%	0%	10%
Editing	7%	7%	3%	10%
Computer Skills – General	6%	6%	7%	5%

Almost two thirds (64%) of the TV workforce cited the need to ‘further develop existing skills base to acquire new work’ as the main reason for their current learning and skills development needs. This was followed by ‘increased competition in the job market’ (43%) and ‘increased demand for content on multiple platforms’ (42%). The reasons were popular within each of the TV sub-sectors though the ‘demand of increased commercial pressures’ (40%) was the most common reason cited by individuals working in Cable and Satellite TV.

## 9. Future Skills Gaps<sup>65</sup>

Skillset’s 2010 Creative Media Employer Survey asked employers to identify any potential future skills gaps. Interestingly TV employers predicted that there would be gaps in a wide variety of broad skills areas: Technical skills (mentioned by 33% of TV employers), skills to develop content for multiple platforms (30%), leadership and management (30%), sales and marketing (28%), multi-skilling (28%), creative talent (27%) and skills in using sector specific software packages (27%).

Within the broad category of ‘technical skills’, TV employers were most likely to specifically mention editing (13%), TV/Video production (11%) and camera skills (7%). Likewise within ‘skills to develop content for multiple platforms’ there were a huge variety of specific potential future skills gaps mentioned, the most common relating to general computer skills (predicted by 9% of TV employers).

<sup>65</sup> Unless otherwise stated all data in the ‘Future Skills Gaps’ section are from Skillset’s (2010) Creative Media Employer Survey.

In terms of identifiable skill needs in the future, the main focus for the TV sub-sector seems to be:

- Programme innovation;
- Deal structuring;
- Cross media ownership;
- IP issues;
- Extended scheduling skills;
- Diagonal thinking across creativity and entrepreneurialism;
- Multi-platform awareness.

The skills will be most needed in commissioning, scheduling, transmission and distribution, followed by production and post production, and lastly concept development. All skills will need to be applied across a variety of output platforms. The introduction of YouView next year is particularly likely to create related skills needs around the production of content for multiple-platforms.<sup>66</sup> Channel 4 have already committed several million to developing apps for this platform, but other broadcasters should soon follow suit – skills will be in demand for this new platform over and above TV. Underpinning these skills areas, high quality management skills will also increasingly be in demand, including:

- Asset exploitation and management;
- Risk management;
- Project management;
- Partnership and investor relation management;
- Marketing and promotional management.

Finally, technical expertise will continue to be highly important as digitisation continues to increase the technical content of the Creative Media Industries processes, products and services.<sup>67</sup>

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<sup>66</sup> YouView is a partnership between the BBC, ITV, BT, Channel 4, Five, Arqiva and Talk Talk to develop a common interface for Internet Protocol Television (IPTV) in the UK. To be launched in 2011, YouView will attempt to replicate the success of Freeview for internet television. See [www.youview.com](http://www.youview.com)

<sup>67</sup> Skills Review: A Skills Review for the TV and Radio Sector: A Report for Skillset, Ofcom and BTRS (May 2009)