

Photo Imaging – 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 shortages¹. As a result, Skillset conducts and utilises its own research and intelligence for most sectors within its footprint. Photo Imaging is a notable exception to this rule as the relevant SIC codes to a considerable extent enable data to be abstracted and analysed at a sub-sectors level from the major national surveys.

The LMI presented in this document are a summary of extracts from official data sources (e.g. Labour Force Survey and the Inter-Departmental Business Register) and those generated through Skillset's comprehensive research programme. More information about Skillset's research programme can be found by visiting www.skillset.org/research.

2. Size of Sector

The Photo Imaging sector encompasses four main sub-sectors: Photographers; Image Producers and Photo Retailers; Picture Libraries and Agencies and Manufacturing and Support services.

Video, Film and Photography accounted for 0.3% of UK Gross Value Added (GVA) in 2008, an estimated figure of £2.7bn.²

In 2009 there were an estimated 8,650 Photo Imaging businesses in the UK. This marks a decline from the figure of 9,050 recorded in 2008 but still higher than estimations for 2006 and 2007(see Figure 1).

The majority of companies are based in England (7,900, including 3,100 in London). There is a significant base in Scotland (500 companies), with a further 200 in Wales and 100 in Northern Ireland.³

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

² DCMS Economic Estimates, December 2010. Figures for Video, Film and Photography cannot be disaggregated.

³ IDBR 2009.

Figure 1 Number of companies working in Photographic Activity

Sector	Number of companies			
	2006	2007	2008	2009
Photographic Activity	8,245	8,265	9,050	8,650

Note: time series comparisons are indicative only.

The majority of establishments in the sector are small with 91% having 1-4 employees or fewer and just 1% having 26 or more. This differs somewhat from the profile of the wider Creative Media Industries where the vast majority (84%) of companies are small (fewer than 10 people) and 2% of companies are large (100 people and more).^{4 5}

As shown in Figure 2, there are approximately 43,100 people employed throughout Photo Imaging of whom nearly 15,000 work in Portrait Photographic activities, 1,700 in Other Specialist Photography (not Portrait), 6,050 in Film Processing and 20,250 in Other Photographic Activities.⁶ This equates to approximately 8% of the entire Creative Media Industries workforce. On average throughout 2005-2007 there were 43,700 people working in Photo Imaging indicating consistency in employment within the industry.⁷

Figure 2 Size of Photo Imaging workforce

Sector/Sub-sector	Number in workforce	%
Photo Imaging (Total)	43,100	
Portrait Photographic activities	15,100	35%
Other Specialist Photography not Portrait	1,700	4%
Film Processing	6,050	14%
Other Photographic activities; n.e.c.	20,250	47%

Just under a quarter (24%) of the Photo Imaging workforce is based in London⁸, lower than the wider Creative Media workforce (38%).⁹ The main other significant base in England is the South East (14%). This is followed by the South West (13%), East of England (12%), West Midlands and North West (both 9%). The distribution across the remaining regions is shown in Figure 3.

Employment in the devolved nations is slightly lower than the UK average (9% within the Photo Imaging industry compared to 11% of the wider Creative Media Industries). They

⁴ Skillset (2009) Employment Census and IDBR 2009 (Photo Imaging, Publishing and Advertising).

⁵ IDBR 2009 – some very small businesses operating without VAT or PAYE schemes (self-employed and those with low turnover and without employees) may be missing from these estimates. In addition, these estimates do not include companies working in photographic manufacturing, retail or repair. Also, due to changes in SIC classification direct comparison between 2009 data and previous years is not possible, the figures are indicative only.

⁶ Labour Force Survey Jan - Dec 2010

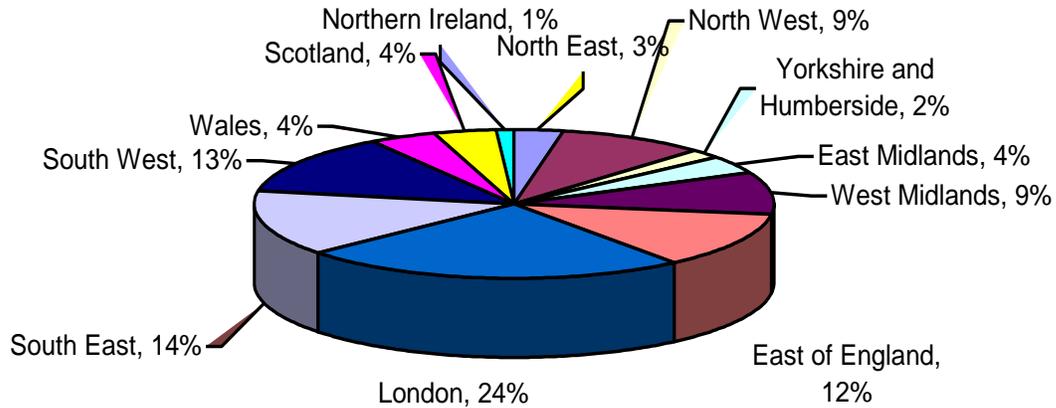
⁷ Labour Force Survey, 2005-2007 Yearly Average. Note: due to changes in SIC classification direct comparison between 2010 data and previous years is not possible, the figures are indicative only.

⁸ Labour Force Survey Jan - Dec 2010.

⁹ Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey, LFS Jan-Dec 2010. Cinema Exhibition excluded.

are mainly concentrated across Wales and Scotland.

Figure 3 Work base of the Photo Imaging workforce by nation/English region



As shown in Figure 4 the Photo Imaging workforce is overwhelmingly concentrated in associate professional and technical roles (73% of the workforce). A further 7% work as managers and senior officials followed by administrative (5%) and secretarial and sales and customer services (5%). This pattern is similar to the wider Creative Media Industries, albeit with a significantly higher proportion of associate professional and technical roles in the Photo Imaging industry.

Figure 4 Distribution of the Photo Imaging Workforce by Occupation

Occupational Group	Photo Imaging	Creative Media
Managers and Senior Officials	7%	24%
Professional Occupations	3%	5%
Associate Professional and Technical	73%	46%
Administrative and Secretarial	5%	9%
Skilled Trades Occupations	3%	4%
Personal Service Occupations	0%	< 0.5%
Sales and Customer Service Occupations	5%	5%
Process Plant and Machine Operatives	1%	1%
Elementary Occupations	1%	6%

3. Shape of the Sector

Two-thirds (68%) of the Photo Imaging workforce are freelance. Overall, 24% of those working or available for work in the Creative Media Industries are freelance.¹⁰

More than a third (36%) of Photo Imaging employers actually use freelancers (lower than the Creative Media average of 50%). This is higher amongst Photographic Activity employers (39%), with 31% of other Photo Imaging employers using freelancers.

More than a fifth (22%) of employers in the Photo Imaging sector predict an increase in demand for freelance staff over the next 12 months, varying from a high of 25% of Photographic Activity employers to 19% of other Photo Imaging employers. This compares to 24% across the Creative Media Industries.¹¹

Just over a quarter (27%) of the Photo Imaging workforce had worked in more than one sub-sector of the Creative Media Industries in the past 12 months. This is close to the wider Creative Media average of 30%.¹²

47% of the Photo Imaging workforce are female, a 10% increase on the figure for 2007.¹³ This is also higher than the proportion of women in the wider Creative Media Industries (39%) and the same as the wider UK economy (47%).¹⁴ Two thirds (66%) of employees in the Photo Imaging industry are women, compared to just 38% of freelancers.¹⁵

7% of the Photo Imaging workforce are from a BAME background, the same figure as in 2007.¹⁶ This is a higher proportion of BAME individuals than in the wider Creative Media Industries (6%) but lower than the wider UK economy (9%).¹⁷ However, it must be considered that over a fifth of the Photo Imaging workforce is based in London where 19% of the workforce is from a BAME background.¹⁸

The Photo Imaging workforce has a high proportion of disabled individuals in the workforce relative to other Creative Media sectors - 12% being disabled (including both DDA disabled and work-limiting disabled). This compares to 9% of individuals in the

¹⁰ Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey and LFS, ONS Jan - Dec 2010.

¹¹ Skillset (2010) Creative Media Employer Survey

¹² Skillset (2010) Creative Media Workforce Survey

¹³ Labour Force Survey Jan -Dec 2010 & Labour Force Survey Jan – Dec 2007. Note: due to changes in SIC classification direct comparison between 2009 data and previous years is not possible, the figures are indicative only.

¹⁴ Photo Imaging and UK economy from Labour Force Survey Jan -Dec 2010; Creative Media from Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey, LFS Jan - Dec 2010

¹⁵ Labour Force Survey Jan - Dec 2010

¹⁶ Labour Force Survey Jan -Dec 2010 & Labour Force Survey Jan – Dec 2007. Note: due to changes in SIC classification direct comparison between 2009 data and previous years is not possible, the figures are indicative only.

¹⁷ Photo Imaging and UK economy from Labour Force Survey Jan - Dec 2010; Creative Media from Skillset (2009) Employment Census, Skillset (2010) Creative Media Workforce Survey, LFS Jan - Dec 2010.

¹⁸ Labour Force Survey Jan - Dec 2010

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).¹⁹ The proportion of disabled individuals in 2010 has also increased from 7% in 2007.²⁰

Over three-quarters (76%) of the Photo Imaging workforce is aged 35 or over, this has risen from 68% in 2007.²¹ This is much higher than both the wider Creative Media workforce (61%) and the wider economy (65%). The proportion of the workforce aged 35 or over is significantly higher amongst men (82%) than women (69%).²²

Just under a third (31%) of the Photo Imaging workforce have dependent children, compared to 31% of the wider Creative Media workforce and 36% of the wider economy.²³

4. Recruitment, Working Patterns and Career Development

Amongst Photo Imaging employers who have recruited in the last 12 months, a quarter (26%) recruited from other Creative Media Industries compared to 37% that recruited from outside of the Industries (28% and 41% respectively amongst all Creative Media employers). This split was less wide amongst Photographic Activity employers, 28% of which recruit from other Creative Media Industries and 33% from outside of the Industries.²⁴

Approaching half (47%) of Photo Imaging employers recruit direct from education (whether school, college or university). This is a little higher than the proportion of all Creative Media employers (45%). There is no significant difference between sub-sectors.²⁵

A fifth (22%) of the Photo Imaging workforce heard about their first job in the industry via an advertisement (lower than the 31% of the wider Creative media workforce).²⁶ The same proportion (22%) actually devised their own project, a figure much higher than within the wider Creative Media workforce (5%), likely to be caused by the high proportion of freelancers in the Photo Imaging workforce. Also associated with this is the 9% of the Photo Imaging workforce who stated that their first job was starting up their own business. Informal methods of acquiring a job tended to be less common amongst

¹⁹ Photo Imaging and UK economy from Labour Force Survey Jan - Dec 2010; Creative Media from Skillset (2010) Creative Media Workforce Survey, LFS Jan - Dec 2010

²⁰ Labour Force Survey Jan – Dec 2007. Note: due to changes in SIC classification direct comparison between 2009 data and previous years is not possible, the figures are indicative only.

²¹ Labour Force Survey Jan -Dec 2010 & Labour Force Survey Jan – Dec 2007. Note: due to changes in SIC classification direct comparison between 2009 data and previous years is not possible, the figures are indicative only.

²² Ibid

²³ Photo Imaging and UK economy from Labour Force Survey Jan - Dec 2010; Creative Media from Skillset (2010) Creative Media Workforce Survey, LFS Jan - Dec 2010

²⁴ Skillset (2010) Creative Media Employer Survey

²⁵ Ibid

²⁶ Skillset (2010) Creative Media Workforce Survey

the Photo Imaging workforce, for example, 12% made contact with the company (18% of the wider Creative Media Industries); 9% heard about it from a friend or relative (16% of the wider Creative Media Industries) and 8% directly from an employer (10% of the wider Creative Media Industries).

One in ten (8%) members of the Photo Imaging workforce started work in the industry between 2009-2010, a further quarter (23%) started in 2004-2008 and 13% in 2000-2003. A quarter (23%) started in the 1990s, a fifth (20%) in the 1980s and the remaining 13% in the 1970s or earlier. A smaller proportion of the wider Creative Media Industries workforce had started work prior to the 1990s (14% in the 1980s and 10% in the 1970s or earlier).²⁷

The Photo Imaging workforce works an average of 8.7 hours per day (the same as the wider Creative Media Industries). Two-fifths (41%) of the Photo Imaging workforce work for 9 or more hours per day on average (compared to 44% of the wider Creative Media Industries workforce).²⁸

Approaching three-quarters (73%) of the Photo Imaging 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 workforce.²⁹

The Photo Imaging workforce earn on average £24,150 per year from work in the Creative Media Industries. This is lower than the average income across the wider Creative Media Industries of £30,550. A quarter of the Photo Imaging workforce earn less than £12,000 per year from work in the Creative Media Industries compared to just 12% of the wider Creative Media workforce.³⁰ The Photo Imaging average is slightly higher than the £20,450 average income of the workforce estimated in the Skillset (2007) Photo Imaging Workforce Survey.

A survey of photographers conducted by the British Photographic Council (BPC) found that the average (mean) freelance photographer profit was £18,821, compared to a mean staff photographer salary of £34,535. Only the top 19% of freelance respondents said they made a profit of £30,000 or more, compared to 35% of staff photographers who said they earned a salary of £30,000 or over. 29% of freelance photographers said their profit was between £1 and £10,000. 16% of freelancers who responded said they did not make a profit in 2009.³¹

The BPC survey went on to report that from 2008 to 2009 31% of photographers experienced an increase in turnover, 19% said it was roughly the same, and 50% said that turnover had fallen. Predictions for 2010 were generally more optimistic than those for 2009, with 35% expecting turnover to rise (compared with 21% in 2009) and 40% expecting turnover to fall (compared with 47% in 2009). Female photographers were

²⁷ Ibid

²⁸ Ibid

²⁹ Ibid

³⁰ Ibid

³¹ British Photographic Council (2010), Industry Survey of Photographers. Note: Given that the salary questions were optional, there is likely to be survey bias towards more successful photographers who may be more likely to be prepared to share their figures.

generally more optimistic about the prospects for 2010, with 39% expecting their turnover to increase, compared to 32% of male photographers.³²

More than two-fifths (44%) of the Photo Imaging workforce have undertaken unpaid work at some point during their career in the Creative Media Industries (other than occasional charitable contributions). This is slightly higher than the wider Creative Media Industries where 40% of the workforce have undertaken unpaid work.³³

The BPC survey also revealed that few photographers specialise in one particular area. The five most common areas of work were weddings and other private commissions, business/corporate, news, stock photography and family and school photography, undertaken by between 20% and 40% of photographers. Areas where photographers were more likely to specialise included celebrity/paparazzi, wildlife and sport. In addition, photographers reported working for a wide range of clients, the most common being private individuals/general public, corporate/business, magazines and newspapers.³⁴

As shown in Figure 5, just 8% of the Photo Imaging workforce plan to move to a different job within the Industry in the next 12 months (lower than the Creative Media average of 20%). A further 3% plan to move job but to a different Creative Media Industry and another 4% plan on leaving the Creative Media Industries altogether (again lower than Creative Media as a whole).

Some stark differences are apparent when looking at potential changes relating to freelance work. Over half (55%) intend to broaden the scope of their work, a third (35%) plan to change the direction of their freelance work and a fifth (19%) plan to become freelance. All of these options are far more prevalent amongst the Photo Imaging workforce than the wider Creative Media workforce (not a surprise due to the higher proportion of freelancers). It does however highlight the increasing importance and attraction of freelance work within the industry.³⁵

Figure 5 Anticipated changes to career in the next 12 months

Change in next 12 months	Photo Imaging Workforce	Creative Media Workforce
Move to a different job in same Industry	8%	20%
Move to a different job in different Creative Media Industries	3%	8%
Move to a different job outside Creative Media Industries	4%	7%
Become freelance	19%	9%
Broaden scope of freelance work	55%	27%
Change direction of freelance work	35%	14%
Expect to be made redundant	6%	7%
Temporarily leave current role (e.g. maternity leave or career break)	7%	5%

³² British Photographic Council (2010), Industry Survey of Photographers

³³ Skillset (2010) Creative Media Workforce Survey

³⁴ British Photographic Council (2010), Industry Survey of Photographers

³⁵ Skillset (2010) Creative Media Workforce Survey

5. Qualifications

Under Half (46%) of the Photo Imaging workforce are graduates, compared to 57% of the wider Creative Media workforce and 37% of the wider economy.³⁶ Comparison with the proportion of graduates in 2007 (45%) reveals that there has been no significant change.³⁷

Of those members of the Photo Imaging workforce who hold an undergraduate degree or diploma, two-fifths (42%) have a qualification in Media Studies or a related subject, whilst 55% hold a qualification in some other subject. In the wider Creative Media workforce a smaller proportion hold a Media Studies or related degree (28%).³⁸

The most common media related subjects amongst the Photo Imaging workforce are: Photography (48%), Media/Communication Studies (15% of those with a Media related degree) and Journalism (10%). The most common subjects in other areas are: Crafts/Creative Arts and Design (31%), Science (16%) and History (10%). Graduates came from a wide variety of institutions with Nottingham Trent University (14%) and the University for the Creative Arts (Formerly University College for the Creative Arts) (7%) the most common institutions of study.³⁹

After those educated to degree level or above the highest qualification most commonly attained was NVQ Level 2 (16%) followed by NVQ Level 3 (15%). A trade apprenticeship was the highest qualification attained for just 3% of the workforce.⁴⁰

A majority of Photo Imaging employers (60%) report that formal qualifications are not a priority. Meanwhile approaching a fifth (17%) value undergraduate degrees, certificates or diplomas and 12% value technical or vocational qualifications. A small proportion of employers value other types of qualifications such as A levels or GNVQs (5%); N/SVQs (4%), postgraduate qualifications (4%); Foundation degrees (3%), GCSEs (2%) and Apprenticeships (2%). There were only slight difference by sub-sector, with Photographic Activity employers more likely than those in other Photo Imaging sub-sectors to value technical or vocational qualifications (14% and 10% respectively).⁴¹ In contrast to this finding which suggests employers place little value on qualifications is the high level of graduate employment that currently exists within the workforce (46% are graduates as reported above).⁴² 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

³⁶ Photo Imaging and UK economy from Labour Force Survey Jan - Dec 2010; Creative Media from Skillset (2010) Creative Media Workforce Survey, LFS July 2009 – June 2010

³⁷ Labour Force Survey Jan – Dec 2007. Note: due to changes in SIC classification direct comparison between 2009 data and previous years is not possible, the figures are indicative only.

³⁸ Skillset (2010) Creative Media Workforce Survey

³⁹ Ibid

⁴⁰ LFS, ONS Jan - Dec 2010

⁴¹ Skillset (2010) Creative Media Employer Survey

⁴² LFS, ONS Jan - Dec 2010

undertaken industry-specific courses, particularly those approved by Skillset.⁴³ 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, nearly half (48%) stated a preference for these qualifications to be in media studies or a related subject. Just 5% preferred a non-media subject and a further 40% did not have a preference. Employers in the Photographic Activity sub-sector were particularly keen to prefer media studies or related qualifications (59%).⁴⁴

6. Supply and Provision of Learning and Development in Sector

In HE: 1,663 Photo Imaging relevant courses⁴⁵ exist across the UK and these courses were being studied by 30,403 students⁴⁶ in 2008/09. An above average proportion of these learners are female (54%), whilst 13% are BAME and 13% had an identified disability. In 2008/09 9,001 individuals attained a Photo Imaging related qualification (consisting of 2,491 Postgraduate, 5,451 first degrees, 209 foundation degrees and 848 other undergraduate qualifications).⁴⁷

In FE: we have identified 127 learning aims that are in some way relevant to the Photo Imaging sector and these account for 14,253 learners in England in 2008/09. 56% of these learners are female, 21% are BAME and 14% had an identified disability.⁴⁸

In the private sector: Of the 8 providers supplying usable information regarding provision to the Photo Imaging sector the courses most commonly covered were: digital photo image manipulation, DSLR Camera, and freelancing skills and business skills for photographers (specific to Management and Leadership). Specific skills covered commonly included Adobe and Apple products, archiving and picture libraries, copyrighting and contracting and specialist photography – wedding, products, and studio portraiture.

⁴³ 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)

⁴⁴ Skillset (2010) Creative Media Employer Survey

⁴⁵ See 'Defining Courses Relevant to Skillset Key Sectors' in the Supply Mapping section of Annex A of http://www.skillset.org/uploads/pdf/asset_16297.pdf?3

⁴⁶ 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.

⁴⁷ 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. Further information regarding this study can be found in the methodology section.

⁴⁸ 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. Further information regarding this study can be found in the methodology section.

Perspective of Employers

Over a third (34%) of Photo Imaging employers fund or arrange learning or development for staff, lower than the 47% of employers across the Creative Media Industries. This varied from 36% of Photographic Activity employers to 32% of those working in other Photo Imaging sub-sectors.⁴⁹

Three fifths (62%) of these employers who also use freelancers extend learning and development opportunities to them.⁵⁰

Amongst employers offering learning and development to staff, the majority favour sending staff out to an external course or seminar (65%). Structured support on the job by another member of your workforce e.g. mentoring, coaching (51%) and books/other printed materials (49%) were utilised by around half of employers. In-house training sessions conducted by another member of your workforce (45%) and ad-hoc non-structured support on the job by another member of their workforce (44%) were also relatively popular methods, with internet based/online training (34%) a less popular option.⁵¹

Just 12% of Photo Imaging employers have a learning and development plan for the year ahead (lower than the 18% of employers across the wider Creative Media Industries). This varied from 14% of Photographic Activity employers to 9% of those working in other Photo Imaging sub-sectors.⁵²

Seven in ten (70%) Photo Imaging employers have seen no change to their learning and development budget over the past year. One in ten (10%) had seen a decrease, whilst a slightly higher proportion (12%) had actually seen an increase 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). There was little difference by sub-sector.⁵³

Skillset's (2010) Creative Media Employer Survey investigated employer usage of apprenticeships, graduate internships and work placements/work experience posts. Just 6% of Photo Imaging employers offer apprenticeships, though two-fifths (42%) would consider doing so in the future. Other Photo Imaging employers are more likely than those in Photographic Activity to offer Apprenticeships already (8% and 4% respectively), however those working in Photographic Activity are more likely to state that they would consider doing so in future (46%, compared to 37% of those in other Photo Imaging sub-sectors).⁵⁴

Just 8% of Photo Imaging employers offer graduate internships, whilst another 31% would consider offering an internship. These figures are lower than employers in the

⁴⁹ Skillset Creative Media Employer Survey (2010)

⁵⁰ Ibid

⁵¹ Ibid

⁵² Ibid

⁵³ Ibid

⁵⁴ Skillset (2010) Creative Media Workforce Survey

wider Creative Media Industries (18% and 36% respectively). The proportion of other Photo Imaging employers already offering graduate internships (13%) is much higher than the proportion of Photographic Activity employers (4%).⁵⁵

Seven in ten (72%) Photo Imaging employers offer or would consider offering work placements or work experience posts. This includes 45% of employers that already offer work placements/work experience posts. The proportion of each sub-sector already offering work placements/work experience posts varies from 52% of other Photo Imaging employers to 39% of Photographic Activity employers.⁵⁶

Perspective of Workforce

Half (50%) of the Photo Imaging workforce have undertaken some form of learning or development in the past 12 months. This is lower than the wider Creative Media workforce (56%). Within the Photo Imaging Industry, freelancers (54%) are much more likely than employees (44%) to have undertaken learning or development in the past 12 months (this is the reverse of the pattern found amongst the wider Creative Media Industries workforce where 59% of employees and 48% of freelancers had undertaken learning or development).⁵⁷ Overall there has been no movement in the proportion of the workforce undertaking learning or development since 2007 (when 50% reported that they had done so in the preceding 12 months).⁵⁸

Those in the Photo Imaging workforce who had undertaken learning or development over the past 12 months had completed an average of 26.3 days of learning or development during this time. This is one of the higher rates amongst all Creative media sectors and is significantly higher than the average figure of 19.6 days. A fifth (22%) had undertaken more than 20 days of learning or development, compared to 13% of the wider Creative Media workforce.⁵⁹ In 2007 a lower average number of days learning and development was recorded – 7.6 days. Even amongst Photographers the average was 8.3 days (Photographers make up the majority of the sample in the 2010 survey).⁶⁰

A wide range of areas of learning and development were undertaken by the Photo Imaging workforce in the past 12 months. The most common were photography (undertaken by 27% of the workforce) and computer skills in a variety of specific software packages (26%). These were followed by business development & commercial awareness (12%), specific technical or craft skills (12%), management and leadership (11%) and specific equipment skills (7%).⁶¹

More than a third (37%) of the Photo Imaging workforce who had received learning or development in the past year had done so via a private training provider (37%, compared to 39% within the wider Creative Media workforce). A further 34% had

⁵⁵ Ibid

⁵⁶ Ibid

⁵⁷ Ibid

⁵⁸ Skillset (2007) Photo Imaging Workforce Survey

⁵⁹ Skillset (2010) Creative Media Workforce Survey

⁶⁰ Skillset (2007) Photo Imaging Workforce Survey

⁶¹ Skillset (2010) Creative Media Workforce Survey

received it via a public education body (including Universities, Higher and Further Education Colleges and Regional Screen Agencies), which is significantly higher than the wider Creative Media workforce (15%). Three in ten (31%) had provided the learning and development themselves, 25% from a trade association or membership organisation, and just 23% had received it via their employer (much lower than the 49% amongst the wider Creative Media Industries). The high proportion of freelancers in the sector influences these results.⁶²

Nearly two-thirds (63%) of the Photo Imaging workforce look for information on learning and development via internet searches (49% amongst the wider Creative Media Industries). Trade associations or membership organisations are also a major source of information in the sector (46% citing such organisations as a source of information, compared to 29% overall). Colleagues (25%), training providers (24%), trade press (22%) and email circulars (17%) are also common sources of information. Other sectors commonly seek information via their company intranet, manager or HR department but only a small minority of the Photo Imaging workforce do so – this is undoubtedly related to the high number of freelancers in the sector.⁶³

Barriers to Learning/Development

Half (51%) of Photo Imaging employers said that there were particular reasons preventing them from providing more learning and development for their workforce (a similar proportion as found amongst employers in the wider Creative Media Industries – 50%). The most frequent reasons cited include ‘your company cannot afford to invest in training’ (52%), ‘employees are already fully proficient’ (41%), ‘not enough time’ (39%) and ‘courses are generally not suitable for your company's needs’ (36%).⁶⁴

Virtually all (98%) of the Photo Imaging workforce that have tried to access learning or development or information regarding it have experienced barriers to access. This is much higher than the wider Creative Media workforce (88%).⁶⁵ It represents only a very slight change from 2007 (when 96% of the Photo Imaging workforce had experienced barriers).⁶⁶

Amongst the Photo Imaging workforce the main specific barrier experienced is that fees are too high (69%), the highest of all Creative Media sectors. Other common barriers faced by the Photo Imaging workforce are difficulty assessing the quality of courses (47%), opportunities being in inconvenient places (37%), a lack of suitable opportunities in the region or nation that I live/work (30%), and fear of losing work through committing time in advance (28%). The only barriers that the Photo Imaging workforce were less likely than average to face were their employer not being willing to pay (14%, compared to 25% of the wider Creative Media workforce) and their employer not being willing to give time off for learning and skills development (8%, compare to 21%). This is to be

⁶² Ibid

⁶³ Ibid

⁶⁴ Skillset (2010) Creative Media Employer Survey

⁶⁵ Skillset (2010) Creative Media Workforce Survey

⁶⁶ Skillset (2007) Photo Imaging Workforce Survey

expected from a largely freelance workforce. A full breakdown of results is given in Figure 6 below.⁶⁷

Figure 6 Barriers to Learning and Development

Barriers Experienced	Photo Imaging	Creative Media
No barriers or obstacles experienced	2%	12%
Lack of suitable opportunities in the UK	22%	12%
Lack of suitable opportunities in the region or nation that I live/work	30%	19%
Possible loss of earnings too high a risk	20%	10%
Fees are too high	69%	46%
Opportunities available are in inconvenient places	37%	19%
Opportunities available are at inconvenient times	26%	18%
Domestic/personal arrangements	15%	11%
Fear of losing work through committing time in advance	28%	16%
Lack of available information	15%	16%
Lack of availability of materials online	17%	9%
Difficult to assess the quality of courses	47%	27%
Employer not willing to pay	14%	25%
Employer not willing to give time off for learning and skills development	8%	21%
Other	4%	3%

7. Skills Shortages

Just 6% of Photo Imaging employers have current vacancies, and of these employers, 56% report having hard to fill vacancies and hence skills shortages (higher than the Creative Media employer average of 46%).⁶⁸ Amongst Photo Imaging employers this equates to 3% of all employers that are experiencing hard to fill vacancies. This varies from just 2% of employers in the Photographic Activity sub-sector to 5% of those in other Photo Imaging sub-sectors.⁶⁹

The occupation in which these skills shortages exist most commonly is Distribution, Sales and Marketing.⁷⁰

Photo Imaging 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 sales and marketing (46%), leadership and management (37%), skills in using software packages such as Photoshop, Avid and Final Cut Pro (34%) and multi-skilling (31%).⁷¹

⁶⁷ Skillset (2010) Creative Media Workforce Survey

⁶⁸ Skillset (2010) Creative Media Employer Survey

⁶⁹ Ibid

⁷⁰ Ibid

⁷¹ Ibid

Around seven in ten Photo Imaging employers that have reported hard to fill vacancies have taken specific actions to overcome skills shortages.⁷²

8. Skills Gaps

Perspective of Employers

Just under a quarter (24%) of Photo Imaging employers report a skills gap within their current workforce, lower than the Creative Media average (28%).⁷³ There was little difference between Photographic Activity employers (25%) and those in other Photo Imaging sub-sectors (23%).

Approaching three quarters of Photo Imaging employers highlighted sales and marketing (72%) as an area in which a skills gap exists amongst employees. Skills in using software packages such as Photoshop, Avid and Final Cut Pro (58%) and technical skills – including computer programming and usage (46%) were also highlighted as skills gap areas. Amongst freelancers the most commonly identified skills gap areas were skills in using software packages such as Photoshop, Avid and Final Cut Pro (60%), technical skills (commonly photographic skills and computer/software usage, 42%) and sales and marketing (41%).

Skills gaps amongst their current workforce were most frequently associated with camera/photography, distribution, sales and marketing and library/archives roles for employees and camera/photography for freelancers.⁷⁴

Photo Imaging employers reporting a skills gap specified a range of affects on the company as a result. More than half (56%) reported that they have had to delay developing new products or services. Furthermore around half of these employers also said that their company had to outsource work they would prefer to keep in-house (49%) and lost business or orders to competitors (48%). Two fifths (41%) had to increase operating costs (48%) and more than 6 third (35%) are experiencing difficulty in meeting quality standards.⁷⁵

Approaching two-thirds (64%) of Photo Imaging 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 (71% of employers). Over half (56%) are increasing or expanding trainee programmes and 34% are redefining existing jobs.

Video skills – Skillset undertook a small survey and follow-up focus groups to look at the need for photographers to have video skills. This is currently recognised as a skills issue which is likely to increase in the future.

Perspective of Workforce

⁷² Ibid

⁷³ Ibid

⁷⁴ Ibid

⁷⁵ Ibid

Three-fifths (59%) of the Photo Imaging workforce have current learning or development needs. Three in ten (29%) do not have any needs and the remaining 11% 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. Across the wider Creative Media Industries 54% of the workforce have learning or development needs. Within the Photo Imaging workforce freelancers (68%) are more likely than employees (43%) to have current learning or development needs.⁷⁶ The overall proportion of the workforce reporting a learning or development need is only slightly increased from 2007 when 57% had such needs.⁷⁷

Figure 7 lists the ten most common areas of learning and development needed as reported by the Photo Imaging workforce. As a comparison the subjects of learning and development most commonly undertaken over the past 12 months have also been included. In terms of current learning and development needs, three in ten (31%) of the workforce need to further their computer skills in specific software packages. Around a fifth mentioned each of business development and commercial awareness (22%), sales and marketing (20%) and photography (17%). Interesting patterns emerge when comparing these subjects to the proportion of the workforce who have recently accessed such learning and development. Business development & commercial awareness and sales & marketing are both areas in which demand must have recently increased or provision has not been meeting previous demand.⁷⁸

Figure 7 Most common areas of learning or development needed

Subject of training	Photo Imaging (% need this subject)	Photo Imaging (% undertaken this subject)
Computer Skills - Specific Software Package(s)	31%	26%
Business Development & Commercial awareness	22%	12%
Sales & Marketing Skills	20%	4%
Photography	17%	27%
Technical or Craft Skills - Specific Form(s)	10%	12%
Technical or Craft Skills - General	9%	9%
Lighting	8%	4%
Accounting & Finance	6%	1%
Design and Development of Web Sites or Web Applications	5%	3%
Management and Leadership Skills	4%	11%
Freelancing / Running a Business	4%	3%

⁷⁶ Skillset (2010) Creative Media Workforce Survey

⁷⁷ Skillset (2007) Photo Imaging Workforce Survey

⁷⁸ Ibid

9. Future Skills Gaps

Skillset's 2010 Creative Media Employer Survey asked employers to identify any potential future skills gaps. Interestingly Photo Imaging employers predicted that there would be gaps in a wide variety of broad skills areas: skills in using sector specific software packages (36%), sales and marketing (35%), multi-skilling (26%) and technical skills (20%).⁷⁹ Employers specifically working in the area of Photographic Activity were even more likely to cite skills in using sector specific software packages (41%) and sales and marketing (37%).

10. Threats to business

The British Photographic Council's 2010 Survey of Photographers revealed that twice as many respondents considered amateur photographers a threat compared to other professional photographers (74% compared to 36%). This pattern was even greater for staff photographers, 16% of who considered other professional photographers to be a threat to their livelihood compared to 77% that considered amateur photographers to be a threat. Many respondents elaborated on this, blaming clients who placed price above quality, and that amateur photographers could charge lower prices due to lower overhead costs or being subsidised by income from other occupations.

The second and third most prevalent threats reported by photographers were falling market rates (67% of photographers) and falling demand for their services (56%).⁸⁰

10. Copyright

Copyright legislation is frequently misunderstood and abused with severe consequences for photographers' earnings. In general under UK copyright legislation, any freelance photographer is the default copyright owner of any photograph they take. However, many of those who commission photographers assume that they automatically own copyright by the act of commissioning a photographer. Recent evidence produced by the British Photographic Council reports that 59% of photographers are aware of copyright infringement of their work in the last three years at an average market value cost of £3,605 per photographer. Failure of photographers to protect their copyright can have a significant effect on an individual's earning power, meaning that on average they earn a third less than photographers that do protect their copyright. Even so, 70% of photographers did not pursue copyright infringements with the difficulty of the legal process cited as the main reason. This was supported by 82% of photographers who stated that quicker and easier copyright would benefit their business.⁸¹

⁷⁹ Skillset (2010) Creative Media Employer Survey

⁸⁰ British Photographic Council (2010), Industry Survey of Photographers

⁸¹ Ibid