A Skills Audit of the UK Film and Screen Industries

Report for the British Film Institute

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Executive Summary

The UK screen industries are of huge economic and cultural benefit to the economy, from Film and Television to Animation and Visual Effects. Yet, rapid growth and technological change are contributing to skills challenges and shortages, threatening the continued prosperity of the sector. This research sought to work with industry leaders to understand these skills developments and how they might be tackled. What did we find?

- **The UK film sector is a large net contributor to the Treasury, and is experiencing a period of rapid growth that outstrips every other sector**. The film industry contributed £2bn in export revenues in 2015, making UK film one of the most export oriented parts of the UK economy, and the film and wider industry grew by three times the rate of the UK economy in 2013/14.

- **The sector employs 66,000 people** who work across the value chain. The largest sub-sector, production, is dominated geographically by London and the South East where 65% of its employees are based.

- **Freelancing is common**, especially within production; in 2014, 51% of workers within the sub-sector were self-employed.

- **The industry workforce does not reflect the diversity of the UK**. In production, only 3% of employees are from a minority ethnic background, compared to 12.5% nationally; at strategic management level, ethnic diversity is even poorer across the value chain.

- **The industry is not gender balanced, especially at more senior levels**. Only one in five key production personnel working in the UK in 2015 were women. Women across the screen industries also receive on average £3,000 less than their male counterparts.

- **Just 5% of screen workers consider themselves to be disabled**. There is evidence for a disability pay gap of £8,450.

- **Screen employers and workers have raised concerns regarding the provision of education and skills training**, stating that it is not an adequate match for job roles. Courses do not always provide the skills required by employers and a clear progression map is not available. Careers advice and guidance for screen is unsatisfactory.

There was a clear consensus from consultations with employers, stakeholders and the workforce that diversity was a significant issue facing the sector. Those from less advantaged backgrounds experience significant barriers to entering and progressing in the industry.

- The **lack of workforce diversity is viewed as the biggest challenge facing the film and screen industries**. Ethnic minorities, women and particularly those with caring responsibilities, those with disabilities and people from less advantaged backgrounds, were seen to face the biggest challenges in entering and progressing in the industry;

- **A number of barriers to access job and careers opportunities were identified**, these included: aspirational barriers; financial barriers; lack of networks; knowledge

and information barriers; cultural and attitudinal barriers; geographic barriers; and, employer behaviour/lack of flexibilities;

- **An attractive tax credit regime, coupled with rapid technological change**, was identified by interviewees as the bigg**est drivers of growth, and change, in the film and screen sectors**. In particular, rapid growth driven by a favourable tax credit regime was seen as contributing to current labour shortages and skills challenges;
- Interviewees felt the move to digital had been managed but that **technological change was continuing to drive skills gaps and skills shortages for highly specialised craft roles, front line technical roles**, and across **many post-production activities**;
- Technological change was also emphasised by interviewees in terms of the **disruption in the business models** in the film and screen industries, which **increased the need for a fusion of creative, digital and entrepreneurial skills**;
- New labour market entrants were seen as **lacking key soft skills rather than job specific skill sets**;
- Although there were examples of excellence identified, on the whole, **the current skill provision and support offer for the industry was viewed as not fit for purpose**, with a confusing array of initiatives, limited careers advice and guidance, and lack of clear progression routes from education to work.

An analysis of Higher and Further Education reveals a large potential supply of available labour. That this exists at the same time as skills shortages within the industry suggests a mismatch between skills needed by employers and the skills provided by the education system:

- **The film and screen industries are highly attractive for learners**; large numbers undertake learning in aligned subject areas in both Higher Education (HE) and Further Education (FE) courses every year;
- Whilst there are **significant numbers studying in areas which are more vocational** such as film production, computer games and motion picture directing/producing, a **substantial proportion of learning is concentrated in general areas such as media and communication studies which may not be delivering enough technical skills**, required in particular to meet skills shortages;
- The pool of learners in HE and FE is **considerably more diverse than the population as a whole on a range of metrics** – gender, ethnicity, and disability – and **more geographically dispersed than the film and screen industries**;
- However, **a number of subject areas are less diverse in terms of their learner populations**. In particular, **gender diversity is low in computer games and high-end computing** and those studying subjects related to **theatre are more likely to be white and have been educated privately** compared to the student population as a whole.

To ensure the continued success and competitiveness of UK film and screen, there is a clear need for industry, stakeholders, educators and government to work collaboratively to: address market failures; coordinate activity and prioritise resources; maximise the value of mainstream provision; and, leverage additional investment.

We have identified five strategic priorities that will be crucial to delivering the skills infrastructure required to support the ongoing success of the film and screen industries:

1. **Enhancing provision.** Mainstream education for the screen industries is fragmented and failing to deliver the skills needed by the sector. It is vital to **simplify and build a more coherent, responsive skills infrastructure**; supporting wider reforms to technical education and involving industry to ensure quality and trusted accreditation of courses.

2. **Attracting and cultivating talent.** Young people lack a true understanding of the screen industries; the breadth of roles available and the career paths that exist. The sector must **enhance awareness and understanding of education, training, employment and progression opportunities** to draw new and diverse talent to the industry.

3. **Driving diversity.** The evidence reveals ongoing, and in some cases worsening, challenges around diversity. It is essential the industry **improves the recruitment, retention and advancement of women, BAME, disabled people and those from less advantaged backgrounds** to remain economically and creatively competitive.

4. **Building bridges.** Few learners progress directly from education into employment and employers report a lack of 'set readiness' amongst new entrants. The sector must build on and strengthen linkages between initiatives that **support learners transition from education to work and maximise reforms to apprenticeships** in order to 'open the door' to the screen industries.

5. **Professional development.** The research highlighted a lack of clarity of the training and qualifications required for career progression and a shortage of professional, business and leadership skills. **Strengthening the skills of workers and business leaders in the screen industries** will be central to improving absorptive capacity and supporting growth of indigenous businesses.

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Glossary

Apprenticeships – a job with training, which allows trainees to earn while they learn, as well as gaining a nationally recognised qualification.

Churn – those leaving the workforce for retirement or other reasons, creating a need to recruit and train new entrants to replace them ('replacement demand').

Continuing Professional Development (CPD) – learning activities undertaken by professionals to improve their skills once in work.

Distribution – the process of making a film available for viewing by an audience, including the acquisition of the rights to a film, the plan to release the film in the UK and abroad, and its marketing and promotion.

Devolved administrations – refers to the Welsh Assembly Government, Scottish Government and Northern Ireland Assembly.

Exhibition – the release of a film for audiences including via cinema, television broadcast and Video on Demand.

Export revenue – income generated from the sale of goods and/or services to overseas countries.

Further education (FE) – any study after secondary education that is not part of higher education (that is, not taken as part of an undergraduate or graduate degree).

Gross domestic product (GDP) – A measure of a country's income and output. GDP is defined as the total market value of all final goods and services produced within the country in a given period of time.

Gross value added (GVA) – The amount that individual businesses, industries or sectors contribute to the economy. Broadly, this is measured by the income generated by the business, industry or sector less their intermediate consumption of goods and services used in order to produce their output.

Higher education (HE) – learning at degree-level or above, including first degrees, Higher National Diplomas (HNDs), and foundation degrees.

Local authorities (LAs) – local government responsible for delivering a range of public services. There are c.150 upper tier local authorities in England, 32 in Scotland, 22 in Wales and 11 in Northern Ireland.

Local Enterprise Partnerships (LEPs) – partnerships between business and local government responsible for driving local economic growth. They only exist in England, where there are 39 LEPs.

Production – the conversion of the creative ideas of the screenwriter and director into a finished film, including pre-production activity (e.g. recruitment of crew, location scouting, set construction and scheduling) and filming.

Tax reliefs – the Government offers a reduction in tax for productions that are certified as British. Film Tax Relief is now available at 25% of qualifying film production expenditure, for those productions that pass the Cultural Test or qualify as an official co-production.

Technical education – education and training to develop the technical knowledge and skills that industry needs.

Total economic contribution – includes the value of goods and services produced by the industry, plus the additional value it creates through its spending, employment (and their spending in the wider economy) and through merchandise, UK brand promotion and tourism.

Visual effects (VFX) – The various processes by which imagery is created and/or manipulated outside of live action material.

1. Background and introduction

The UK film and screen industries are enjoying a period of success; film production is contributing billions to GDP[1], generating a strong trade surplus and investing millions of pounds in infrastructure. But to ensure the future success of the UK film and adjacent industries, it is critical that the talent pipeline is strong and capable of providing skilled workers who can continue to produce output and grow the sector. However, the rapid growth of the sector, alongside technological change, has increased recruitment and skills problems.

This report is a comprehensive audit of the skills challenges facing the industry, including analysis of the current gaps and where the future skills shortages are likely to be. It examines existing skills provision, identifying good practice and which areas could benefit from further development. Alongside these topics, this report examines the diversity of the UK film sector, discussing the current situation and the barriers preventing those from diverse backgrounds entering and staying in the industry.

This paper draws its conclusions on the basis of original research. This was conducted over a period of several months, and included quantitative analysis of national statistics and business data, qualitative interviews with businesses, stakeholder groups and workers within the screen industry, focus groups, analysis of provision and interviews with an expert Delphi panel.

1.1. Definition of the film and screen industries

The audit focusses on craft and technical skills within the UK film industry, extending to include adjacent screen industries (high-end TV, video games and animation) where there exists commonality of job roles and skill needs.

Within this paper, the subject matter is referred to as "the UK film industry" or "the UK screen industries" to include wider industries adjacent to film. The film sector includes four sections: production, post-production, distribution and exhibition.

The discussion paper is structured as follows:

- **Section 2** provides an over**view of the workforce and skills issues in the film and screen industries**, drawn from a rapid evidence review;
- **Section 3** sets out an **analysis of the skills challenges facing the film and screen industries** from the expert consultations and workforce roundtables;
- **Section 4** provides an **analysis of current skills provision** relevant to the sector as well as characteristics learners;
- **Section 5** sets out **five strategic priorities** to address the skills and diversity challenges facing the sector and a delivery plan of how they might be tackled in future.

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[1] Creative Skillset (2014). *Media Workforce Survey*

2. Overview of the film and screen industries

In summary the key findings from the evidence review show:

- **The UK film sector is a large net contributor to the Treasury, and is experiencing a period of rapid growth that outstrips every other sector.** The film industry contributed £2bn in export revenues in 2015, making UK film one of the most export oriented parts of the UK economy, and the film and wider industry grew by three times the rate if the UK economy in 2013/14.

- **The sector employs 66,000 people** who work across the value chain. The largest sub-sector, production, is dominated geographically by London and the South East where 65% of its employees are based.

- **Freelancing is common**, especially within production; in 2014, 51% of workers within the sub-sector were self-employed.

- **The industry workforce does not reflect the diversity of the UK**. In production, only 3% of employees are from a minority ethnic background, compared to 12.5% nationally; at strategic management level, ethnic diversity is even poorer across the value chain.

- **The industry is not gender balanced, especially at more senior levels**. Only one in five key production personnel working in the UK in 2015 were women. Women across the screen industries also receive on average £3,000 less than their male counterparts.

- **5% of screen workers consider themselves to be disabled**. There is evidence for a disability pay gap of £8,450.

- **Screen employers and workers have raised concerns regarding the provision of education and skills training**, stating that it is not an adequate match for job roles. Courses do not always provide the skills required by employers and a clear progression map is not available. Careers advice and guidance for screen is unsatisfactory.

The UK film and screen industries have enjoyed considerable success in recent years, driven in part by the highly attractive tax credit regime supported by a world class talent base.

Films that are associated with the UK (i.e. they have either been produced in the UK, co-produced in the UK with another nation or are films that are based on the work of UK writers and novelists) have enjoyed exceptional success over the past two decades. In the period 2001-2014, 42 of the top 200 grossing films released worldwide qualified as UK made, with their collective earnings topping $25bn globally[2]. This new 'golden period' for UK film seems set to continue, with several popular global franchises being produced within the UK's borders.

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[2] BFI (2015). *Statistics Yearbook*

This production brings with it significant contributions to the UK economy, with the core film sector contributing £1.4bn in direct gross value added (GVA)[3]. When the entire spending efforts created by the UK film sector are considered, the total economic contribution in 2013 amounted to £3.7bn GVA[4]. At 65% of sectoral GVA this was the highest export intensity of any UK service sector in 2013, and almost double the national rate of 35%[5]. The film industry contributed £2bn in export revenues in 2015, yielding a trade surplus of £1.2bn and making UK film one of the most export oriented parts of the UK's service economy[6]. Additionally, more than £425m has been invested by companies into film infrastructure across the UK since 2007.[7]

The screen industry does not operate in isolation, however, with its adjacent industries of high-end television, video games and animation also contributing to the UK economy. High-end TV contributed £852m in GVA in 2013, supporting 16,800 full-time equivalent (FTE) jobs. Video games are a British success story, with the sector creating £1.4bn in GVA and 29,000 FTEs within the same year, and the animation sector continued to grow, contributing £171m in GVA and supporting 4,700 FTE.[8]

2.1. Growth in the industry

From 2010-2015, the UK screen industry (combined with the music industry) saw the value of its output increase by 60% to just under £32bn[9]. In 2014, total UK film production spend reached £1,471m, a significant increase on the previous peak of production of £1,325m seen in 2011[10]. The film, TV, video, radio and photography sector is estimated to have grown by nearly 14% between 2013/14: three times the rate of the UK economy, with Creative Industries growing faster than any sector in the ONS Blue Book. Over this same period, construction grew by 10%, financial and professional services by 7% and information and communication by just 3%.[11]

In the period 2009-2013, employment in the core UK film sector grew by 21.6%, outpacing the economy-wide employment increase of 3.0%[12]. Within film, certain sub-sectors in particular have seen explosive growth in the past decade; visual effects, for example, grew by 16.8% between 2006-2008[13]. A strong rate of growth is expected to continue, with the wider creative and digital sectors predicted to require around a million additional workers in the period 2014-2024[14]. As the industry continues to grow so too will the demand for new skills and talent, which risks outing pressure on the market for skills. Indeed, under the current pace of growth seen over the last five years, this could amount to over 10,000 new entrants to the sector by 2020 and when accounting for churn this could be more than 25,000.

Whilst this growth has in part been positively supported by the tax credit offered by the UK Government for the industry, to encourage both indigenous UK film and to attract foreign

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[3] Olsberg-SPI (2015) *Economic Contribution of the UK's Film, High-End TV, Video Game and Animation Programming Sectors*
[4] Olsberg-SPI (2015)
[5] Olsberg-SPI (2015)
[6] ONS (2017) *International Trade in Services*.
[7] Film Distributors Association (2015) *The Economic Impact of the UK Theatrical Distribution Sector*
[8] Olsberg-SPI (2015)
[9] The Guardian. *GDP figures confirm boom in UK film and music industries.* Tuesday 27th October 2015
[10] Olsberg-SPI (2015)
[11] DCMS (2016) *Creative Industries Economic Estimates*.
[12] Olsberg-SPI (2015)
[13] Livingstone, I. & Hope, A. (2011) *Next Gen: transforming the UK into the world's leading talent hub for the video game and visual effect industries.* NESTA.
[14] UKCES (2015) *Working Futures*

films to be produced in the UK[15], we do need to guard against any negative consequences as seen in other countries. For instance in Canada[16], the tax credit programme supporting work in the Canadian independent film and television production sector has contributed to negative impacts on both working conditions and labour mobility. As developments have increased competition, this has put pressure on labour costs and frozen out some local workers as some international productions have used foreign crews.

2.2. Future drivers of change in the industry

In common with other parts of the UK economy, the screen industries are being transformed by external megatrends and disruptive forces such as technology and globalisation. As the sector changes production methods and commercial models to support ongoing growth, this creates the fusion of creative, digital and entrepreneurial skills[17]. The convergence of creative content across platforms, is blurring the lines between creative and digital areas, and digital skills are becoming increasingly required in post-production, as well as within the Art and Construction departments (i.e. digital painting and 3D printer model making)[18]. Employers within film are likely to increasingly seek individuals with a breadth of knowledge to deliver outputs across these different mediums[19]. Additionally, these changes increase demand for those with strategic thinking skills to identify how outputs can best be delivered across platforms.

Consumers are changing the way they interact with the moving image. A need to continually innovate drives demand for new skills. People increasingly need to execute and maximise revenue across different platforms, bringing together different parts of the value chain and catalysing a convergence of film and high-end TV. Companies offering on-demand subscription services for television and film (such as Netflix and Amazon Prime) have fundamentally changed the consumption model of film, bridging the common divide between production and distribution/exhibition[20]. These developments suggest the traditional sub-sectors within film are becoming increasingly merged, and may bring about different skills requirements for the industry, such as the need to hire those with higher level business and management skills.

The physical production and patterns of consumption of film across the globe have also changed. As a result the screen industries are increasingly global. With China becoming the second largest consumer of feature films globally in 2012, with year on year growth of 40%[21], the ability to do business with the country will become even more crucial. Outsourcing functions to another country has become more common too, with India being a major beneficiary; from 2010-2014, the country saw a 7%, 20% and 22% uplift in its animation production, VFX, and post-production sectors respectively[22]. This raises particular demands for workers too, especially those at the executive level, to work across borders and with those from other cultures. In particular it is anticipated to have implications for foreign

[15] Magor, M. & Schlesinger, P. (2009) *"For this relief much thanks" Taxation, film policy and the UK Government.* Oxford University Press
[16] Coles, A. (2010). Unintended consequences: examining the impact of tax credit programmes on work in the Canadian independent film and television production sector, *Cultural Trends*, 19(1-2): 109-124
[17] Frontier Economics (2016) *Absorptive Capacity: Boosting productivity in the Creative Industries.*
[18] Technology Strategy Board (2013) *Creative Industries Strategy 2013-16.* Technology Strategy Board/Innovate UK, Wiltshire.
[19] UKCES (2015) *Sector insights: skills and performance challenges in the digital and creative sector.*
[20] Technology Strategy Board (2013)
[21] Jordi, C. M. (2015) *Transnationalism and the decentralisation of the global film industry.*
[22] EY (2014). *Indian Film Council VFX Report*

language skills, and/or to place growing demands on strategic and management skills for those working within international markets.

Collectively these trends are creating critical skills deficiencies that threaten to undermine the future success of the film and screen industries. For instance previous research has identified multiple areas of skills shortages and skills gaps, which risk getting worse if not corrected. These have been found across the value chain and at varied levels of seniority. The table below shows the job roles identified as "hard to fill vacancies" by three recent studies[23][24][25]:

Figure 1: Hard to fill vacancies in the film and screen industries

Production	Post-Production	Distribution	Exhibition
Script editors	Sound recording	Animation sales	Digital content and audience choice
Producers	Pre-visualisation	Legal	Financial and legal
Production accountants	Computer animators	Discoverability and monetisation	Leadership and people management
Prosthetics	Post-production executives		
Production managers	Mixers and recordists		
Steadicam	3DS		
Programming			

Additionally, multiple areas of 'key skills priorities' were identified within the Craft and Technical sub-sector of film and screen. These included drafting skills, 3DS software skills, and application of facial hair (within makeup).[26]

2.3. Employment within the industry

The film sector is divided into four sub-sectors; production, post-production, distribution and exhibition. These sectors take a film through its stages of being created, starting from raising funds in production to being shown in the cinema. The Annual Population Survey recorded 66,000 people working in film in 2015 (including freelancers); however, they combined production and post-production figures. The breakdown of employment within film can be seen in Figure 2.[27]

As can be seen in Figure 2, production dominates the value chain. The same can be seen in terms of the numbers of companies operating in the different sectors. In 2014, there were 6,090 film production companies and 2,465 post-production companies in the UK, compared with the 405 film distribution companies, and 215 operating within exhibition.[28]

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[23] Creative Skillset (2014) *Film Employer Panel*
[24] Creative Skillset; UK Film Skills Fund (accessed March 2016; http://creativeskillset.org/who_we_help/creative_professionals/funding_for_film_training)
[25] Creative Skillset (2014) *Media Workforce Survey*
[26] Creative Skillset (2016) *Craft and Technical Bursaries* (accessed May 2016; http://creativeskillset.org/assets/0001/0248/Creative_Skillset_Film_Skills_Fund_-_Craft_and_Technical_Bursaries_Guidelines.pdf)
[27] BFI (2016) *Employment in the Film Industry*
[28] BFI (2016) *Employment in the Film Industry*

Figure 2: Film industry employment by sub-sector
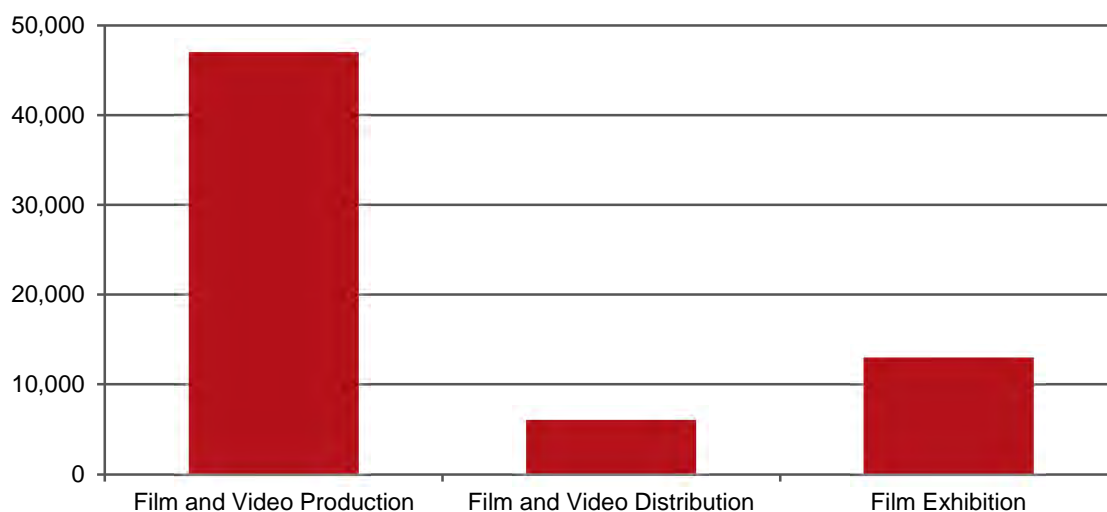
Source: Annual Population Survey 2016

Despite its smaller size, in 2013 the film distribution sector had a turnover of £1.2bn, and generated £356m in direct GVA. Through its direct economic impact, the UK's film distribution sector also generated an estimated £132m in export revenue for the UK economy.[29]

2.4. Composition of the workforce and diversity

Few industries in the United Kingdom can claim to reflect the country they are working in, be it in their office locations, the gender or ethnic balance of their staff or the way they employ their workers. However, the screen industries face particular barriers to redressing the imbalances in their sector, and particularly in addressing a lack of workforce diversity. These issues are explored below.

Employment in some parts of the screen industries is not evenly distributed across the United Kingdom. The vast majority (65%) of UK film and video production is based in London and the South East; this is more than double the proportion for all sectors (across the whole economy, just 30% of the total workforce is based in the London and South East region)[30]. In real terms, this means that 30,000 of the 47,000 workers in this sector operate within the same corner of the country (although this figure fluctuates yearly as it is dependent on production activity; but in previous years the South East has been even more dominant, containing 71% of all production in 2013). The picture is similar for other parts of the screen industries; for example 56% of the animation workforce is based in London.[31]

For the regions and nations of the UK, retaining talent and not losing it to the pull of London is a significant challenge. After London and the South East, Scotland has the next largest proportion of film production with 13% of the UK workforce being based there[32]. However, whilst entrants to the sector may "cut their teeth" in areas like Scotland, retaining them once

[29] Film Distributors Association (2015) *The Economic Impact of the UK Theatrical Distribution Sector*
[30] BFI (2016) *Employment in the Film Industry*
[31] Creative Skillset (2013) *Employment Census 2012*
[32] Creative Skillset (2013) *Employment Census 2012*

they have been trained and developed is not easy whilst the capital is offering more opportunities and year-round projects compared to those available north of the border[33].

Efforts have been made to increase regional production and output within film and its adjacent industries; for example in television broadcasting, regional production has increased significantly over the last five years[34]. More encouragingly for locational diversity, research has shown that 87% of broadcast production is crewed with local talent (although the figures for Sport and Comedy reveal a heavy reliance on London based staff)[35]. However, these figures may hide the real picture, with allegations of "massaging" of recruitment data, i.e. productions actually crewed in London but 'funnelled' through regional back end offices.[36]

Across all regions freelancing is common in the screen industries, with 30% of workers registering as self-employed, compared with a UK national self-employment rate of 15%[37]. Within film production specifically, this rate is higher; in 2015, 51% of those in film and video production (over 24,000 people) were self-employed[38]. The rate of self-employment in production has been high for several years, peaking at 61% in 2014, with the lowest figure in the last six years remaining at around half the workforce (49%) in 2012 and 2013. Since 2010, 44% of the increase in the number of people working in film (see section 2.1) has consisted of freelance workers[39], suggesting that there is an upwards trajectory in the number of people working this way. The implications of this for the industry are debatable; whilst mass self-employment can be beneficial for workers, bringing greater flexibility and autonomy, it can also bring difficulties. For instance, a study into regional broadcast production that found 45% of freelancers had only been in paid work for six months of the year or less and therefore it can create more precarious employment.[40]

Rapidly increasing demand within certain sectors of the screen industry means that outsourcing is becoming more common, as Hollywood productions look outside of the US to access talent bases in areas such as digital effects[41]. Technical developments mean that highly skilled animators (with the ability to produce work using techniques such as hand drawn CEL animation and CGI) are in increasing demand within animation and within VFX in film and TV. As seen earlier, outsourcing a film's VFX to another country has become more common, with India in particular recently becoming a major beneficiary, in its animation production, VFX, and post-production sectors.[42]

The film industries public presence means that diversity (or lack thereof) amongst on screen talent is more obvious than that of other industries, and can in itself be a strong correcting force. However, behind the camera diversity rates are also low. But, the effect on creative output is no less important. Crucially, this is not just about ensuring fair and equal access to all regardless of background, but also recognising the value of a more diverse workforce to

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[33] Kelly, L.W. & Champion, K. (2015) Shaping screen talent: conceptualising and developing the film and TV workforce in Scotland. *Cultural Trends,* 24(2): 165-175
[34] BBC Academy (2015) *English Regions Skills Review: Building a stronger broadcast media beyond London*
[35] BBC Academy (2015)
[36] BBC Academy (2015)
[37] Creative Skillset (2014) *The Creative Media Workforce Survey 2014: Summary Report*
[38] BFI (2016) *Employment in the Film Industry*
[39] Creative Skillset (2014) *Employment Census*
[40] BBC Academy (2015)
[41] Yoon, H. & Malecki, E.J. (2009). Cartoon planet: worlds of production and global production networks in the animation industry. *Industrial and Corporate Change,* 19(1): 239-271
[42] EY (2014)

securing business success and better productivity[43]. Global businesses in the screen industries need to pull on a global talent pool that reflects the wider population of consumers to stay ahead and more relevant. For instance: companies in the top quartile for racial and ethnic diversity are 35% more likely to have financial returns above their respective national industry medians. This also applies to gender equality; companies with three or more women on executive boards have delivered 36% better return on equity since 2010[44]. When looking specifically at the film sector, research has shown that films with female writers and producers consistently outperform male-driven projects but receive far less financing[45]. Despite high return on investment figures, on average films directed by women receive 63% less distribution than those directed by men.[46]

Across the sub-sectors of film, people from minority ethnic backgrounds are under-represented compared to national averages[47]:

Figure 3: Percentage of BME employees by sub-sector

Sector	% of All Employees	% Strategic Management / Executive
Production	3	0
Sales and Distribution	8	3
Exhibition	4	3
Creative Sector Average	*7*	*N/A*
UK Average	**12.5**	**8**[48]

This is despite research showing that BAME individuals are higher than average consumers of digital film and video rental, and are over-represented in cinema visitor numbers[49], indicating high awareness of the film sector and its related activities. This lack of diversity restricts which "stories" make the screen, minimising the influence of some backgrounds and outlook's ability to influence cultural output.[50]

The screen industries also face problems relating to gender equality. In 2015, just 14.4% of writers involved in UK films and 9.4% of directors were female[51]. The vast majority of key production personnel in the UK screen industry are men; within directors, writers, producers, executive producers, cinematographers and editors working on films in production in the UK in 2015, only 20% were women[52]. Within these key personnel, the greatest gender equality is found in production, where 27% were women, and the lowest in cinematography, where only 7% working in 2015 were women.[53]

Within film and TV directing, the statistics show that not only are the number of employees not at gender parity (with only 30% of the UK directing workforce being female), but the work

[43] McKinsey & Company (2015) *Diversity Matters*. US.
[44] MSCI World Index (2015)
[45] Slated (2015): see https://filmonomics.slated.com/
[46] Slated (2015): see https://filmonomics.slated.com/
[47] Olsberg-SPI (2015)
[48] Prince's Trust (2016) *Business in the Community: Race for Opportunity*
[49] BFI (2014) *Yearbook*
[50] Kelly, L.W. & Champion, K. (2015)
[51] BFI (2016) *Statistical Yearbook: Employment*
[52] University of Southampton (2016) "Calling the Shots: Women and Contemporary UK Film Culture". *Arts and Humanities Research Council*
[53] University of Southampton (2016)

that they are commissioned to produce is not evenly divided[54]; for example, many popular drama and entertainment shows have never had a female director[55] and in 2011 and 2012 0% of sci-fi/fantasy genre TV episodes were directed by women. Directors UK research suggests that attitudes within the industry are preventing women from working across all genres, as gender stereotyping leads to women being more likely to be hired to direct factual programmes about domestic issues, body image and food[56]. Ethnic diversity is also low amongst directors, with those from BAME backgrounds making up just 3.5% of the directing community (despite making up 14% of the entire UK population). Both this figure and that of female directors has not changed in the last decade[57]. Additionally, when women have found work in the screen industry, they are still affected by the gender pay gap. Across the film and TV sector, women earned on average £1,500 less than the average sector wage and around £3,000 less than male counterparts[58]. They are also more likely to "drop out of the industry", and as such are less likely to occupy senior positions. A study into why women left Ireland's TV sector[59] identified several reasons why female workers did not stay within the industry:

Figure 4: Reasons for leaving the industry

Excluded from an almost exclusive informal recruitment system
Freelance/unreliable employment
"Complete availability for work" becoming the norm, i.e. unsustainable hours
Dearth of mediating institutions (i.e. trades unions) to lobby for improved working conditions
Lack of workplace flexibility

The same study also identified barriers that prevented women from fully participating in the TV sector, including why they felt they could not progress, along with observations about how workplace culture held them back (see Figure 5).

One commonly suggested reason for diversity problems within film and the adjacent industries is the role that informal networks play in determining which projects become commissioned. For example, a study[60] into UK screenwriters looked at the 63 writers credited on a random sample of 40 films certified as British in 2004 and 2005 and released in the UK found:

- In roughly half of cases the writers had a previous working or personal relationship with the commissioning producer, director or production company of the film they worked on.
- Most of writers (77%) were employed after being approached by one of these people, rather than on the basis of a pitch they had made.
- 98% of the writers were white, 82.5% were male, and 66% were over the age of 46. 61% of these writers were not British and 57% were only contactable via a Hollywood agent.

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[54] Directors UK (2016). *Cut Out of the Picture: A study of gender inequality among directors within the UK film industry.*
[55] Directors UK (2016)
[56] Creative Industries Federation (2014). *Creative Diversity: The state of diversity in the UK's creative industries, and what we can do about it.*
[57] Hansard (10 May 2016) "Diversity in the Media" *House of Lords, Grand Committee.* Vol. 771
[58] Creative Skillset (2015). *Workforce Survey 2014: The Creative Media Workforce Survey 2014 Summary Report.*
[59] O'Brien, A. (2014). 'Men own television': why women leave media work. *Media, Culture and Society*, 36(8) 1207-1218.
[60] Rogers, S. (2007). *Writing British Films: who writes British films and how they are recruited.* UK Film Council.

Figure 5: Barriers to participation

Barrier	Description
Recriminations against speaking out	Many women did not pursue legislative rights due to fear of sanctions from informal networks of female peers, who would be relied on to continue access to jobs
Gendering of skills	Can disadvantage women, i.e. male voiceover "taken more seriously", or the clear sense that men were perceived to be more suitable to senior management roles then women
Double standards	Affecting the assessment criteria, with men being promoted on the basis of potential and women on the basis of performance
Labelling	Women were concerned about asserting their rights due to the possibility of gaining a reputation as 'difficult' or 'troublesome' and thereby risking future work
Exclusion	Women faced casual disadvantage at gaining work due to lack of access to 'men's networks'
Informal networks	The informal employment networks of film mean that there is a corresponding absence of any formal structures of negotiation or protection for workers in the industry

This evidence suggests that individuals from diverse groups, who are less likely to have access to these "informal" networks, are being excluded from even the possibility of gaining work. The study suggested that efforts to broaden the diversity of screenwriters should focus on establishing links between the commissioners of screenplays and mid-career British writers from a range of backgrounds.[61]

Women and BAME individuals tend to be bunched into certain lower level occupations in production and exhibition and are likely to be lower paid. Women are under-represented in screenwriting, camera work and other 'technical' jobs[62]. Separate diversity programmes[63] do exist in efforts to increase participation by under-represented groups in more senior roles (see section 3.1) but evidence indicates that diversity programmes in isolation may not be effective; individuals from diverse backgrounds must be integrated into the mainstream in order to be most effective.[64]

Whilst research has been conducted to attempt to understand the lack of ethnic and gender diversity within film, less attention has been given to study of socio-economic exclusion within the screen industries. Data on socio-economic background is not available for the specific film sector, but within the wider sub-section of the creative economy of 'Film, TV, video, radio and photography' 11.9% of employees are defined by the Department for Culture, Media and Sport (DCMS) as "Less [socio-economically] Advantaged". The proportion of jobs within the creative economy that are undertaken by those from more advantaged groups has increased slightly year on year, with 91.9% from more advantaged backgrounds in 2014 (compared to 91.1% in 2011)[65]. This has been attributed to the higher

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[61] Rogers, S. (2007).
[62] Bhavnani, R. (2007). *Barriers to Diversity in Film: A research review*. UK Film Council.
[63] See BFI Diversity Commitment: http://www.bfi.org.uk/about-bfi/policy-strategy/diversity
[64] Watson, P (2001). *Pitch Black: From the Margin to the Mainstream*. Nesta.
[65] DCMS (2015) Creative Industries: Focus on Employment.

risks of entering the industry for those from less advantaged backgrounds, including endemic low pay, precarious work and unpaid work experience.[66]

This is particularly problematic for the screen industries, where work experience is almost essential to gain entry to employment in the sector. The average worker within film must undertake 46 days of unpaid work experience before gaining their first "official" position, and across the whole creative sectors, new entrants work unpaid on average for 52 days before gaining a paid position[67]. Undergoing two and half months of unpaid work is a mammoth task for anyone without private financial backing, and poses a significant barrier to entry into the screen industry. With 69% of film employees London-based[68], working unpaid for an extended period of time in one of the most expensive cities in the world now seems a requirement for new entrants. This is naturally limiting for those without the means to support themselves, which is likely to disproportionally limit participation from large cohorts of people from less socio-economically privileged families or "working class" backgrounds. As individuals from poorer backgrounds are also more likely to be from minority ethnic groups[69], exclusion of those without private financial backing also inhibits efforts to tackle ethnic diversity within the industry.

Less research has been conducted regarding the proportion of film workers who are disabled. However, surveys from 2014 showed that 5% of those working within the screen sectors consider themselves to be disabled[70] (compared to 11% of the wider population). There is also evidence for a 'disability pay gap' of £8,450, with the average wage for a disabled worker standing at £25,450 (compared to £33,900 across the entire creative media sector)[71]. Limited data and analysis around this topic indicates that this area should be identified as requiring further research (both to understand the barriers faced by disabled individuals seeking to enter the film sector and how these can be addressed).

2.5. Skills provision

A wide range of provision exists to train prospective entrants to the screen industry to meet changing skills needs. This provision ranges from college courses to university degrees and professional development. The creative sector as a whole is currently seeing the highest proportion ever of employees with degrees[72], although data does not exist that demonstrates whether or not those undertaking degrees in film production are those who go on to work in the field.

Despite further and higher education courses being viewed as the preferred entry route into the industry, many graduates and school leavers do not arrive 'set ready', as they do not have the skills or experience to be immediately successful in the industry[73]. For example, a recent report suggested that university courses in visual effects do not produce the graduates the industry needs. In some cases this is due to a low level of rigorousness applied to the accreditation of courses[74] which could be improved by faster response time to

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[66] Creative Industries Federation (2014) *Creative Diversity: The state of diversity in the UK's creative industries, and what we can do about it*
[67] Creative Skillset (2014) *The Creative Media Workforce Survey 2014: Summary Report*
[68] Creative Skillset (2013) *Employment Census 2012*
[69] Kenway, P. & Palmer, G. (2006). *Poverty among ethnic groups: how and why does it differ?* Joseph Rowntree Foundation.
[70] Defined by the Equality Act 2010 as having a physical or mental impairment that has a 'substantial' and 'long-term' negative effect on an individual's ability to do normal daily activities.
[71] Creative Skillset (2014) *The Creative Media Workforce Survey 2014: Summary Report*
[72] Creative Skillset (2014) *The Creative Media Workforce Survey 2014: Summary Report*
[73] Livingstone, I. & Hope, A. (2011)
[74] Livingstone, I. & Hope, A. (2011)

the fast paced rate of change in the industry (i.e. ensuring courses contain the most up to date skills). There are also concerns about the lack of an effective strategy in relation to provision, with 'best practice' courses not being scaled up sufficiently to meet demand.[75]

This is in part due to the talent pipeline in several areas of the film and screen failing even at school level. For example, the number of people considering a career in VFX has been suppressed due to schools' focus on office IT skills instead of programming and a lack of career advice regarding the job possibilities in STEM and visual effects[76]. However, there have already been improvements made to ameliorate pipeline issues, with schools' ICT curriculums changed to include programming from an early age.[77]

2.6. Implications

These findings show that:

- The **screen sector is an important part of the UK economy**, providing employment for thousands of people and contributing billions to the Treasury. Its **continued growth and future prosperity depend on the sector remaining competitive.**

- **Rapid growth, driven by global megatrends, alongside ongoing innovation and technological change, has led to skills deficiencies and recruitment difficulties.** If the situation does not change, and demand remains high, these shortages may become worse and inhibit growth and **risk the UK losing out to global competitors.**

- The **sector faces ongoing diversity challenges**, with women, ethnic minorities and disabled people being under-represented within the workforce. **It is imperative that this challenge is addressed for reasons of equity and to ensure that the screen industries have access to the labour and skills they need to remain competitive.**

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[75] BBC Academy (2015). *English Regions Skills Review: Building a stronger broadcast media beyond London.*
[76] Livingstone, I. & Hope, A. (2011)
[77] Rt Hon Michael Gove (22nd January 2014). "Computing and Education Technology", *BETT Conference.* See: https://www.gov.uk/government/speeches/michael-gove-speaks-about-computing-and-education-technology

3. Key findings from the expert interviews and focus groups

In summary the key findings from the expert interviews and focus groups are:

- The **lack of workforce diversity is viewed as the biggest challenge facing the film and screen industry.** Ethnic minorities, women and particularly, those with caring responsibilities, those with disabilities and people from less advantaged backgrounds were seen to face the biggest challenges in entering and progressing in the industry;

- **A number of barriers to access job and careers opportunities were identified**, these included: aspirational barriers; financial barriers; lack of networks; knowledge and information barriers; cultural and attitudinal barriers; geographic barriers; and employer behaviour/lack of flexibilities;

- **An attractive tax credit regime, coupled with rapid technological change**, was identified by interviewees as the **biggest drivers of growth, and change, in the film and screen sectors.** In particular, rapid growth driven by a favourable tax credit regime was seen as contributing to current labour shortages and skills challenges;

- Interviewees felt the move to digital had been managed but **that technological change was continuing to drive skills gaps and skills shortages for highly specialised craft roles, front line technical roles**, and across **many post-production activities**;

- Technological change was also emphasised by interviewees in terms of the **disruption in the business models** in the film and screen industries, which **increased the need for a fusion of creative, digital and entrepreneurial skills**;

- New labour market entrants were seen as **lacking key soft skills rather than job specific skill sets**;

- Although there were examples of excellence identified, on the whole **the current skill provision and support offer for the industry was viewed as not fit for purpose**, with a confusing array of initiatives, limited careers advice and guidance, and lack of clear progression routes from education to work.

This chapter draws on the evidence gathered from the expert panel, employer and stakeholder interviews (**42 individuals** including representatives from across the value chain) and industry and workforce roundtables (four roundtables with a total of **53 attendees**) as well as a follow up qualitative survey of women in the workforce (**11 responses**).

3.1. The diversity challenge

The vast majority of interviewees (36 of 42) cited **the lack of workforce diversity as the biggest challenge facing the UK film and screen industries.**

"Diversity is the biggest issue we need to address." (Producer, small)

"The biggest challenge facing the industry." (Production manager)

"There is no diversity, it has to change." (Producer, large)

"The higher up you go the more like a bank its gets, more corporate, more old boy's network." (Art director)

"No problem attracting people into the industry, there has always been a long queue of people wanting to get in, but the problem is that the industry is nepotistic." (Production manager)

"The whole industry is a closed shop." (Workforce roundtable participant)

The difficulties of **getting in, getting on and staying** in the film and screen industries were identified by the vast majority of interviewees. When talking about diversity challenges it was perceived that the problems were most intense in production and post-production related activities, there were fewer reported diversity challenges identified in the distribution and exhibition part of the value chain.

Tackling the diversity challenge was also **viewed as the only way in which the industry would be able to maintain its competitive position and succeed in the future.**

"We need to address diversity to solve the industry's problems. It's the only way we can remain competitive." (Post-production)

"There are acute skills shortages and increasing the diversity and number of people going into the industry is the only way to solve it." (Producer, large)

Interviewees and focus group attendees identified the following groups as facing the greatest challenges in entering, progressing and staying in the film and screen industries:

- **Ethnic minorities**;
- **Women**, and in particular those with **caring responsibilities**;
- People with **disabilities**; and,
- People from **less advantaged socio-economic** backgrounds.

The screen industry was seen as a difficult place for people with young children. As with most other sectors, this disproportionately affects women. Long, anti-social hours and far away shoots were reported as **barriers to retaining women with children** and techniques to mitigate these, seen as job sharing and/or part time work were perceived as not being possible to implement within many roles in the sector. Female attendees in the focus group commented on the closure of crèches at the BBC and also at Shepperton which meant that there was less provision now to overcome child care barriers. More positively, in a couple of interviews with heads of department (HOD), job sharing was identified as being used to retain women with children in the industry. Another interviewee suggested that the only way to retain high skilled women was to:

"Explore moving them within the business, where there are more normal, family friendly office hours." (Head of production, independent)

There was a perception from some respondents that many parts of the industry were **dominated by people from advantaged socio-economic backgrounds**; something particularly pronounced by those from the Art Department and Production, but not found in

Construction. Several interviewees remarked that the lack of socio-economic diversity had become worse in recent decades, with unpaid internships and the high cost of living in London being seen as barriers that those from lower income backgrounds struggled to overcome. People from these backgrounds are also less likely to have family or friends working in the industry; a barrier when many interviewees reported networks as a common route into the industry.

Current recruitment practices were identified as a key determinant of poor diversity within the industry. Frequently cited problems included: narrow recruitment channels (nepotism and the role of HOD) creating a closed shop; and the dominance of freelancers and unpaid interns presenting a barrier for those without financial means.

Culture and attitudinal barriers were also highlighted by focus group attendees as negatively impacting upon their ability to access opportunities and progress within the industry:

- A number of participants from ethnic minority backgrounds stated that when they went for a job, they were quite often offered traineeships / professional development despite in some cases having over 15 years industry experience;
- Another individual, from a BAME background, who had come down to London from Northern England to work in the screen industry had been told to *"change her accent and change her name."*

The need for private monetary backing to enter the industry has also likely contributed to the lower levels of ethnic minority workers within the screen industry (as those from minority backgrounds are twice as likely to be from a low income family than white people). The vast majority of interviewees reported **a lack of ethnic diversity** within their departments, with one describing the situation as "hopeless".

Fewer references were given to **disability** employment within film, but two respondents did speak about the **difficulties of making sets fully accessible**. One workshop attendee suggested that because of the **freelance nature of work it was very difficult to get access to additional support as a disabled person**. Overall, the impression given by respondents regarding diversity within film was of an industry that accepts it has problems, but has struggled to overcome the persistent barriers preventing it from being inclusive and easily accessible to people from all backgrounds.

3.1.1. Key barriers to entry, progression and retention

Aspirational barriers. Interviewees and focus groups attendees highlighted the lack of visible role models from backgrounds they could relate to. Expert interviewees highlighted the lack of screen role models for people from non-traditional backgrounds, but the lack of diversity behind the camera was identified as being even more of an issue. This means that young people viewed the industry as *"not for them"*. Participant's spoke of the lack of visible diversity, and the need for more mentoring from those who have made it to help alter the current climate of competition.

> *"Very rarely on the red carpet do I see a woman of colour."* (Workforce roundtable participant)

Knowledge and information barriers. The lack of clear and easily available information about the range of jobs in the industry was highlighted as a key barrier for all groups, but particularly those from disadvantaged backgrounds.

"Young people from underprivileged backgrounds do not have a good awareness of the industry; they don't even know what the job roles are… what the terms mean… they don't know what is out there." (Workforce roundtable participant)

"No, a degree is not needed, in fact I feel that we could get a whole new world of people if at secondary school level it was made clear what work in the involved, and what directions young people could take in the technical areas of film making. It seems very much a middle class or kids with connections world at present." (Head of department)

Financial barriers. The requirement in the vast majority of cases for new entrants to undertake unpaid work was a major barrier for people from disadvantaged backgrounds. Financial barriers, in terms of remaining in the industry, were also identified by the workforce more generally (and particularly those who wanted to have a family) due to the project based, freelance nature of work in the sector and the resultant income instability.

"Money is the biggest issue…. Without funding, it's hard for producers to sustain a career." (Workforce roundtable participant)

"It would be tempting to just give up and get a 'real job'… but I want to keep going… I don't want to have to give up because of my background." (Workforce roundtable participant)

"Money is the key to entrance to the sector at all ages." (Workforce roundtable participant)

"It needs to be a job that can be sustained. At the moment for people entering the industry, the hours are long, if you are lucky you get the minimum wage, you need to have a car and live in London!" (Production manager)

Geographic barriers. Employment opportunities are heavily concentrated in London and the South East which was highlighted as a barrier for many people wanting to get into the industry.

"I live in Manchester… I feel cut adrift." (Workforce roundtable participant)

"London is always invested in." (Workforce roundtable participant)

"There aren't enough costume designers in Scotland. They start their careers in the regions and then they move to London and only sometimes come back." (Head of department)

"It's difficult to thrive in the regions, it would be good if people left to learn and then came back, but people leave and learn and stay away… there is a need to improve the delivery of skills in the nations and regions." (Producer, large)

"It's very London centric. People who don't live in London need to figure out how they can afford to move down, then they have to pay for a training programme

themselves, then deal with a freelance industry and no prior knowledge of what's involved." (Producer, large)

"It is unfair that the pool of talent that we now draw on in the film industry consists of people who often have the ability through connections and financial advantage, to stick it out in the South East while gaining experience and more connections." (Head of department)

Lack of networks. The presence of an *"old boy's network"* was seen as negatively impacting on women's ability to access job and progression opportunities. Female focus group attendees felt that they were shut out of these networks and also highlighted the lack of support from *"women that had made it"*. Lack of networks was also highlighted as a major barrier to new entrants and those from less advantaged groups.

"The industry is dominated by Oxbridge, who all know each other and go back decades. It is very difficult as an outsider to break into that circle." (Workforce roundtable participant)

"There's also a lot of nepotism in the industry – if family in the industry open the door. So many people are family or friends of people already working in the industry. Recruitment is via word of mouth and they always look to hire people they know are good and have worked with previously." (Producer, large)

Cultural and attitudes. Focus groups with the workforce revealed widespread examples of perceived discrimination faced by ethnic minorities, women, those from 'working class backgrounds' and also examples of age-related discrimination.

"The gender segregation of VFX is heart-breaking. Young women join the industry as runners and want to be on the artistic side, but they learn that just because they want it, doesn't mean they get to do it. Women are pushed into the production side, whereas men take the artistic jobs." (Workforce roundtable participant)

"Prejudicial attitudes to both my gender and ethnicity have meant that those in positions of power have denied me access to jobs and opportunities for which I am extremely qualified." (Workforce roundtable participant)

Inflexibilities / employer behaviour. Limited flexibility by employers was cited as a barrier by focus group attendees who had caring responsibilities. Multiple respondents spoke about the lack of flexibility from employers for making even small adjustments to the working day to help those with responsibilities toward family members. The *"race towards squeezing budgets"* was quoted as one reason for this inflexibility from employers. However, as noted in the previous section, there were some examples of employer's offering flexible solutions to women with caring responsibilities such as job sharing or reduced hours.

"What do we need? A better working day… flexible times, flexible crèche times." (Workforce roundtable participant)

"Working and having children [is] not compatible. You have to choose between having kids or working… there is no flexibility, or even attempts at being flexible, from employers." (Workforce roundtable participant)

"Increased employer flexibility would greatly assist people who want to have children and stay in work." (Workforce roundtable participant)

"I haven't started a family yet as I can't fit it in around work." (Workforce roundtable participant)

3.1.2. Potential solutions identified

Despite recognition that a lack of diversity was the biggest challenge facing the UK film and screen industries the appetite towards introducing positive discrimination measures such as quotas was low, with many people stating the main cause of the low diversity levels was the *"lack of applications from under-represented groups"*. Concerns were also expressed about the impact that both targeted provision – with narrow definition diversity – and quotas could play in creating perverse incentives and lead to certain groups losing out.

"You need to be careful with diversity targeting, the division and categorisation always causes someone to lose out, a focus on young people means older women lose out." (Workforce roundtable participant)

"Quotas are a good idea and people aren't against them. But the problem is there isn't enough diverse talent to recruit from. If you slapped a quota on the credit, industry wouldn't believe they could achieve it and therefore they wouldn't get their tax credit and they wouldn't come here." (Producer, large)

"She is white so she doesn't tick [the] box… even though she comes from a position of disadvantage, and even though she has perfect skills for production secretary we can't get her a place." (Workforce roundtable participant)

"We have someone else with great experience in high-end TV and a major production. For his new job we first we managed to negotiate a normal training rate, but the company has now insisted on a training bursary instead which is less money. There are perverse incentives to someone on a trainee scheme just because they are from a diverse background – and he had already got the job!" (Workforce roundtable participant)

Workshop attendees were asked to consider the range of potential solutions that would help increase the diversity of the UK film and screen workforce. The following were proposed:

- **Organisational change and a long-term strategy**. Participants suggested there was a clear need for a long-term approach to increasing the diversity of the industry; many felt that although there were programmes out there to help people from under-represented groups, there was a lack of a long-term strategic focus.
- **Diversity funding requirements**. Participants were positive about the BFI Three Ticks[78] funding requirements for films receiving lottery funding. However, they

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[78] The BFI three ticks assessment requires applicants to demonstrate commitment to diversity across three areas of their production, ranging from the makeup of the workforce to the stories and characters on screen, with at least one tick needed in a minimum of two areas for a project to be eligible for BFI production funding:
   1. *On-screen diversity*: diverse subject matter, at least one lead character positively reflecting diversity, at least 30% of supporting and background characters positively reflecting diversity;
   2. *Off-screen diversity*: diverse key creatives (director, screenwriter, composer, cinematographer), at least two heads of department from diverse backgrounds, production crew and production company staff (both with a range of targets across different diverse groups);

thought that there was a need to widen the reach of such measures beyond this with potential to explore using the tax credit as a mechanism to increase diversity.

- **Using data to drive diversity**. Participants suggested that data should be used to hold companies to account on their diversity record, as well as to track those who have received support via diversity programmes to ensure that they do not fall out of the industry; ensuring that they are supported to progress was also emphasised.

- **Aggressive recruitment of under-representative groups** into parts of the screen industry where skills and labour shortages are currently occurring was also suggested as a short-term mechanism to increase diversity. Participants suggested that this would require significant outreach and investment in targeted support.

- **Sustained support** is needed for those who were supported via diversity related programmes. Many participants felt that they were cycling in and out of trainee programmes or placements and not being supported or given the chance to progress. Ensuring that support is on-going and that people are tracked over time could help ensure that people don't cycle in and out and not progress or "fall through the cracks" and end up leaving the industry.

- **Recruitment of role models from diverse backgrounds** to increase the visibility of those working in the industries and to create a network of ambassadors to promote the film industry to young people from less advantaged backgrounds. Developing a network of mentors of "those who had already made it" was also suggested as a way to support people from less advantaged backgrounds enter and progress in the industry.

- **Increased regulation, rules and enforcement of them** (particularly around interns). Participants suggested there was a need for greater regulation of use of unpaid interns and stamping out of bad practice.

- **Investments in services for those with additional needs**, such as crèches at the large facilities to support women with caring responsibilities remain in the industry. It was also suggested that access to targeted support for those with disabilities was required to make the screen sectors more accessible for those with additional needs.

3.2. Current labour demand and skills challenges

The majority of interviewees commented that **the attracted tax regime, favourable exchange rate and strong talent base was driving inward investment and the subsequent high demand for labour.**

"The introduction of the tax credit has been hugely influential; a true game changer. This coupled with the exchange rate and the fact we have some of the very best crews in the world have meant rapid growth of the industry and the volume of films being made now is unprecedented. The industry is reaching a point where there just isn't enough studio space and we just don't have enough people to keep up with demand." (Producer, large)

"It's a good place to make a film because of the tax relief and the standard and quality of the technicians and actors; it makes it a hot place to make films." (Producer, large)

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3. *Creating opportunities and promoting social mobility*: paid internships and employment opportunities for new entrants from diverse backgrounds, training placements for people from diverse backgrounds, demonstrable opportunities for former trainees or interns to progress within their careers.

The high volume of inward investment was highlighted as causing difficulties in the ability of productions to find the crew that they needed. Whilst difficulties in finding the volume of people was highlighted by people working on bigger budget films, **the most intense problems were identified by those working on smaller and independent productions.**

Those working on larger productions were more likely to report no, or very few, skills shortages. Often such shortages were reported only after pushing from the interviewer. Instead, they were more likely to refer to problems of "volume", i.e. those problems only arose in recruiting skilled individuals when numerous big budget films were shooting concurrently. Those from smaller budget films were more likely to say that they had wide ranging recruitment difficulties across all skill/role areas and that they struggled to recruit the right people. They also commonly remarked on how they were "squeezed" by larger productions, missing out on top talent to big productions that could afford to pay more. The following quotes highlight the diversity of views of the ability to access the volume of talent needed.

"They [large productions] take a lot of the available staff, snapping everyone up." (Producer, independent)

"The tax credits have increased the demand for people. It's a volume issue. If two or three large budgets are filming at the same time it's no problem crewing up. When there are four or five big productions that need a large art department it's a struggle." (Art director)

"With smaller films you struggle; big productions hoover everyone up." (Producer, mixed)

"In big productions recruiting isn't a problem; they have the money to take on more expensive people, but smaller productions struggle." (Art director)

"In my experience you can always find a crew at the end of the day. It's just that the best talent gets plucked up fast and ends up in the bigger jobs with the better pay." (Producer, large)

This was **cited as causing problems in the pipeline of talent with people progressing to roles beyond their experience level,** which is causing skills gaps amongst the existing workforce and is leading to a gap in the bottom of the talent pyramid.

"You often have to resort to more junior people or people you don't know." (Producer, independent)

"When there is a boom, the more experienced people get taken on by bigger productions. So less experienced people 'act up' and move up the chain in smaller productions. But this leaves problems at the bottom of the chain, not enough people coming in to fill these gaps." (Producer, large)

"Because big productions are sweeping everyone up, many people do one small job and then go straight into large films, this can make them arrogant and they miss out on developing a wide breadth of skills." (Line producer)

The **reliance of the UK screen industries on inward investment** was also cited by a small number (less than 5) of interviewees as **one of the drivers of the lack of investment in skills development and training** in the industry.

> *"It's [the UK film industry] built on feast or famine… studio films brought in as foreign investment don't feel they need to embrace the needs of the industry, so there is no investment or forward thinking… There are pockets of good practices, but no one is taking the long view." (Producer, large)*

> *"If, IF, the British film industry keeps going at films/work that we have had during the past few years, many more people will gain experience in the industry, BUT, this is not the same as being trained. There seems to be very little investment." (Head of department)*

Technological disruption was highlighted as a key driver reshaping the demand for skills across the value chain. The majority who mentioned technological disruption felt that the biggest change – the move from celluloid to digital – had been managed well by the industry.

> *"Technological disruption has affected all parts of the crew but we have managed it. The biggest disruption for post-production and editing was the move from celluloid to digital, this used to be an issue… now it's gone." (Camera)*

> *"Technological change has and continues to influence the industry a lot, particularly post-production which sees lots of changes. The biggest change was the move from film to digital – film cameras, film deliverables being phased out. But this is done now." (Key industry stakeholder spanning value chain)*

However, **technological change was continuing to drive skills gaps and skills shortages for highly specialised craft roles** (such as 3D modelling), **front line technical roles** (such as camera) and **across many post-production activities** (see section 3.2.2). Technological change was also viewed as driving the demand for people with strong problem solving and analytical skills, communication and with the "right attitude".

> *"We need numbers, but more importantly we need soft skills and people who can solve problems and who respond well to criticism. These are much more important now. We need the right attitude and then we can do the cross training. Personality skills are so important." (Post-production)*

Technological change was also emphasised by interviewees in terms of the **disruption in the business models** in the film and screen industries. This had increased the need for **a fusion of creative, digital and entrepreneurial skills**. Unsurprisingly, the challenge was identified as particularly intense for the independent sector. Interviewees also felt more needed to be done to support indigenous producers to ensure the future sustainability of the industry.

> *"It's so complex to put together funding streams for a feature film... it has become harder and harder, you need to be trying to bring together ten financiers. I do a lot of TV work now as it is much more straightforward in terms of financing, you either have a deal with a network or you don't." (Line producer)*

"The threat to the independent end is massive and complex, the average return is 2.5 per cent of budget. It's an expensive hobby not a business." (Producer, independent)

"Being a film producer is hobbyish… how do you create sustainable production companies?" (Producer, independent)

"There is a shortage of producers in Britain that are indigenous, we need more British films for British audiences, we can't just be a service economy, drawing films from companies in Hollywood to make movies here. We need to make a British product and support to grow the indigenous industry; otherwise we will always be at the whim of global forces." (Producer, large)

"Main weakness is the lack of strategic thinking around potential audiences for products associated with the wider opportunities for IP in a film. There are very few sustainable independent film companies in the world – they need to be connected with others across the sector." (Workforce roundtable participant)

3.2.1. Perceptions of preparedness of new entrants

Interviewees were asked their views of the preparedness of new labour market entrants. In many cases, respondents did not mention job specific or technical skills as lacking in new entrants. Instead, the feedback was that many were not 'set ready'; the following characteristics were identified as important in new entrants:

- **Soft skills**, variously referred to as 'personality', 'having the right attitude', but also to 'have initiative' and 'be a self-starter';
- **Technical engagement** was seen as very important, particularly in front-line technical production and post-production roles;
- **Broader knowledge of the film and screen industries** and the production process;
- Ability to work **collaboratively** and excellent **communication skills**.

The following quotes from the interviews highlight these attributes:

"People to have initiative and good communication skills." (Head of department)

"There is a need to increase soft skills and computer skills." (Head of department)

"Most significant is the notion of being a self-starter." (Workforce roundtable participant)

"You need to want to understand how everyone else's role contributes and have some knowledge of how to use skills to try to drive projects forward, it's important not being afraid to fail." (Producer, independent)

"People who demonstrate that they can work collaboratively, you need to do it with other [film making] people, the BFI academy works because they have group activities there." (Workforce roundtable participant)

As well as the need to be 'set ready', a number of interviewees highlighted the need to better prepare new entrants about being a freelancer and also to better manage their expectations about the career pathway:

"They need to have an understanding of how to manage their cash flow, the tax system, to network. The interview process, which can be strange and random, there is no HR to protect them, so [they] need to understand how to deal with bullying or sexual harassment." (Workforce roundtable participant)

"It's really important that they have a basic understanding about needing things such as an accountant, it's not just about [making a film], you need to be taught the clerical side too." (Head of department)

"People have too high expectations. They want to start their first job in a big production. But you can't start here. I moved into TV first in light entertainment, then onto TV drama, and then film. You work your way up. You get the jobs because of your reputation and experience." (Head of department)

"A lot of it comes down to personality, but we have a duty of care to prepare people properly for the industry. We run a two day induction course on working in the film industry. What earnings to expect initially and over time, what attitudes and behaviours are expected." (Head of department and lecturer)

"It's really important to set realistic goals, be clear from the start that they can't start at assistant director level. We set out realistic career paths, we make them spend a lot of time working with industry, this sets them off with contacts and networks and professionalisation and [they] understand how the set works." (Educator)

3.2.2. Skills gaps and skill shortages

From the employer interviews, the most common skills shortages quoted were: production accountants, various roles within the craft department, skills with film (i.e. not digital filming), construction, rigging, 3D model making, location managers, and art directors. In total 38 specific roles and skill areas were identified.

"[In] exhibition [it is] difficult to fill the top positions as there are no career routes or progression, the bosses make sure there is a buffer between them and their staff." (Stakeholder workshop attendee)

Roles of specific shortages included:

- Art Department (art directors, props);
- Construction (plasterers, painters, riggers);
- VFX (all roles and all levels of seniority);
- Assistant directors;
- Production accountants (again all levels);
- Script supervisors;
- Line producers; and,
- Strategic or business management roles.

Figure 6: Skill/role shortages identified

Production accountants Location managers Line producers First assistant directors **Production Dept**	Art directors Concept artists Draftspeople Craft (general) Sculptors Scenic painters 3D model makers Props Metal workers Researchers **Art Department**	Carpenters Specialist painters Specialist plasterers Riggers Finishing **Construction**	Gaffers **Electrical**
Film camera technicians Script supervisors **Camera**	Costume designers Costume prop makers Costume jewellery **Costume**	Combined hair & make-up skills **Hair & make-up**	VFX (all levels) VFX - effects VFX - Rigging VFX - Compositing Sound effects Editors **Post-production**
	Business/Financial analysts **Distribution**	General managers Technical skills (engineers and sound) Big data analytics Curators Cinema programmers **Exhibition**	

Alongside this, several more general problem areas of the workforce were identified.

The **need for soft skills** was highlighted by several respondents. This alludes to the requirement that, alongside technical and industry specific skills, workers need to have the social skills to be an effective team worker and to interact well with others on set.

The ability of new entrants to use **new technologies** (ranging from 3D Modelling to VFX software skills) was raised as important by respondents. There are concerns that education and training courses are not providing students with skills that are entirely up to date. Finally, **research skills** were identified by the Art Department as an area where entrants are lacking experience. These skills are crucial to ensure historical accuracy on sets.

Figure 7: General skills lacking

Soft skills/attitude, communication and teamwork
Familiarity with new technology
Problem solving, research and analytical skills
Creative/technical fusion
Marketing, negotiation, financial and legal skills
Foundation skills (i.e. being 'set ready')
Management/leadership skills

The literature review drew on numerous sources, from over the past five years, to produce a list of previously identified skills gaps within the screen industry. When compared with the list of skills gaps identified by this research (see Figure 6 and Figure 7), it can be seen that there

are multiple areas of overlap, where the job roles identified were exact matches to those previously identified. These are:

- Production accountant
- Sound recording/editing
- VFX
- Draftspeople
- Hair

There were also multiple job roles highlighted in the literature that were not exact matches for the roles identified by this report, but were found in very similar areas, with similar functions:

- Computer animators [VFX]
- Digital content and audience choice [Business/financial analysts]
- Art department software skills [3D model makers]
- Mixers and recordists [Post-production editors]
- Pre-visualisation [Concept artists]

The continued presence of these job roles/functions in shortages lists indicates that, whilst the industry is aware of problems, either appropriate action has not been taken to address them, or that the existing action is not fit for purpose or not at sufficient scale.

This report identified different areas of shortages within the production sub-sector than had not previously been highlighted. Location managers and line producers were identified by multiple interviewees as a role they struggled to fill, as well as first assistant directors.

This research identifies several areas in Art Department that are 'hard to fill'. Previous work on this area had not identified roles such as scenic painters, props and metal workers, which were raised as areas of skills gaps. Certain areas of art, such as prosthetics, had previously been identified as areas of skills shortages in the literature; however, expert interviewees suggested that employers were not lacking skilled workers in that area.

The shortage roles identified in camera do not match up with those found in the literature. Boom Ops and Steadicam skills were not mentioned by employers as areas where they struggled to find skilled workers; the ability to use film (i.e. not digital film) was by far the most common area mentioned within camera where skills were lacking.

3.2.3. Progression challenges

"The single biggest problem is career progression." (Producer, large)

The majority of interviewees highlighted challenges people faced around progression within the film and screen industries. This was seen as particularly problematic in freelance production and post-production but challenges were also found in exhibition.

In exhibition, there was recognition that there is a lack of clear progression routes for front of house staff. Previously, they might progress to more highly skilled technical roles but with the advent of digital projection there were fewer opportunities. In addition, there were no progression routes to senior management level.

"The nature of employment in the sector is difficult for everyone, everyone has a problem getting in and getting on in the business, we need to create structured aspirational ladders and use the connection between TV and film." (Producer, mixed)

"Progression is also quite closed, if people that did well on one film, they progressed on the next. On series like Harry Potter or Bond you can literally track people's progression from one film to the next. They like to use the same crews and progress the good people." (Producer, large)

"The biggest problem that we have in Yorkshire is the difficulty in progression, there are all sorts of blockages, all over the place, it's very hierarchal and there is something wrong with the model. It is not in [the] interest of heads of departments and managers to encourage other people up and through." (Workforce roundtable participant)

3.3. Future skill challenges

"We have made a big paradigm shift to digital, but it will change further, the rise of China will create different relationships and demand for different content. Globalisation is bringing a new horizon, and the ability to work cross culturally will become more important." (Producer, large)

Interviewees, overwhelmingly, found it difficult to articulate future skill challenges. However, many mentioned the continuing impact technological change would have on the film and screen industries, although they emphasised that the pace of change was considered too fast to be able forecast with any certainty.

"The technical skills are the ones that change hits first – camera, editing – to make sure that we can compete they need to do it really well, command the tech not let it command them." (Producer, large)

However, the following broad skills areas were identified as becoming increasingly more important:

- People with **fusion skills** – creative, technical and entrepreneurial skills (across the value chain);
- Individuals with excellent **problem solving and analytical abilities** (particularly in post-production);
- The ability to work **cross-culturally**, driven by continued globalisation.

Many respondents voiced concern about the ability of the UK screen industries to maintain their global position. The industry was viewed as far too reliant on inward investment and that there was a real need to grow indigenous talent to ensure the future sustainability. The small number of interviews conducted following the European referendum also raised further concerns.

"Problem in the UK is that demand is very cyclical, people come because of the tax incentives and the exchange rate, so depending on what other countries offer the UK comes under threat." (Workforce roundtable participant)

"Ultimately, it's just too hard to predict and very heavily dependent on the exchange rate and tax credit given business decides where to produce films based on the cost. This means Brexit could have big implications for the industry, particularly if we see large swings in the exchange rate." (Producer, large)

"Other countries are starting to catch on and compete. They will implement tax regimes that are more favourable, and companies will leave." (Line producer)

3.4. Views of current support and skills provision

"There are all these things going on, but there's no comprehensive map to link each thing together. It's hard to understand what is available and how it connects. It's unwieldly and fragmented." (Producer, large)

Interviewees and roundtable attendees expressed mixed views about the availability and quality of the current skills provision, training and support offer. A number of interviewees were able to identify some initiatives that they considered exemplar. The ones which were mentioned by two or more interviewees included:

- **The BFI Academy** *"The BFI Academy has really worked, the candidates who come through this, their work has leapt a level." (Workforce roundtable participant)*
- **The National Film and TV School** *"They have a very good master's programme – but very small – VFX is integrated into the pipeline like it is in the real industry." (Post-production)*
- **BAFTA guru** *"This is an example of best practice but is London based and the education programme needs to be rolled out across the UK." (Producer, mixed)*

Others highlighted the broader benefits and skill development that Further and Higher Education provided, in particular soft skills development and a broader knowledge of how the industry works.

"University is not a guaranteed path to success in film, but can work, and it equips people with other skills for life, such as soft skills that are needed in film." (Head of department)

In terms of identifying other exemplar provision interviewees could name numerous courses, programmes and institutions. However, the fact that there was **little, or no, cross over or consensus** (bar the above) between those in same part of the value chain or even from the same sub-sector emphasises the **lack of any clear structured pathways or routes from education to industry**.

However, much of the feedback on the support infrastructure and skills and training provision was more critical in nature:

- Several employers and stakeholders commented that skills/training and support was **confusing and fragmented** and that although pockets of excellence existed they were too small in scale;
- A number of respondents felt that the current offer was **too concentrated on supporting new entrants** and there was limited provision for the rest of the workforce and support to progress;

- **Careers advice and guidance was seen as a key area needing investment and improvement**; this was cited as a key issue by over half of those interviewed and all those who attended the workshops;

"The Government has decimated careers advice and the creative industries are not in a good place to combat it. There are concerns that schools, which now have the statutory requirement to advise pupils on careers, will not have the knowledge or understanding of the wide range of jobs available within the industry – particularly important for behind the camera roles." (Workforce roundtable participant)

- The **lack of practical experience in the majority of vocational education courses** was identified as a key barrier to getting new entrants ready for the industry, and that there was a clear need to **boost access to student placements** particularly for those outside of London and the South East and strengthen opportunities for combining work and learning;

"There is a need to create more bridges across from academia to industry, there are some attempts to do that, but you need to be in it [the film industry] to learn it." (Producer, large)

- The **limited availability of modular skills training** was cited as hampering the ability of people who were already in the workforce to access training;
- The current FE and HE offer was viewed as too concentrated on the creative side – directors, writers, producers – and that there was a **lack of provision of vocational training in the craft skill areas**;

"Schools are not teaching film education that is relevant. We need to value craft skills, which are increasingly technology driven, such as engineering skills for lighting and sound and animation skills." (Exhibition)

- In post-production, concerns were voiced about the ability of the education system to supply the quantity and quality of workers needed to meet the demand. In particular, employers have **concerns with the ability of higher education institutions to keep pace with technological changes or provide students with sufficient practical experience**;
- Although many interviewees were enthusiastic about the potential benefits of **apprenticeships** to the industry, few currently offered them and **many voiced concerns over their suitability** due to the time-limited nature of much of the work. Businesses need to be able to ensure that they have projects and work for long enough to sustain an apprentice in work for a full year or more;

"Apprenticeships don't work for the industry, it works for large establishments, the lifecycles of our projects are too short… also the nature of training doesn't work, it's off the job, you need to learn on the job, learn by doing." (Producer, large)

- A number of respondents felt that **FE and HE provision needed to do much more to manage the expectations of young people undertaking film and screen related education**. A number of respondents stated that young people coming out of college or university did not understand the career pathways and the need to start right at the bottom.

"There is not really anything wrong with Media Studies, it's not necessarily about teaching people for job but you need to manage expectations. The problem comes when those students are told they are being prepped for industry." (Workforce roundtable participant)

3.5. What works; entrance and progression

We asked existing industry workers and those offering training and skills development what they thought worked well in terms of helping people get into the industry and progress. A diverse range of factors were identified:

- **Mentoring and job shadowing to support stepping up** were both seen by a number of interviewees as particularly valuable in supporting people who were mid-career progress, by helping them to expand their networks and gain added experience in a more senior position;

- **On the ground relationship building** to open up opportunities for new entrants with production companies, by building a trusted reputation so that people are more willing to take a risk on someone they don't know;

- **Monitoring and tracking of trainees** to ensure that they don't fall out of the industry and that they were progressing;

- **Trainee placements and financial support to overcome barriers to get a foothold in the industry was seen as crucial**, this was particularly the case for those from disadvantaged backgrounds;

- **Increasing funds available for projects** to allow individuals to focus solely on their work, and to allow them to progress in film without having to take on side work to pay bills;

- **More on-set training opportunities** within university or further education courses which combine work with learning, to increase 'set readiness' of graduates, to keep up with the pace of workplace developments and to increase their likelihood of gaining paid work upon graduation;

- **Development of modular training courses** which are more accessible for those in mid-career, to allow them to continue to develop skills and subsequently secure more work.

3.6. Implications

These findings show that there is **industry wide consensus that the lack of diversity in the workforce is the biggest challenge facing the sector**. This emphasises the need for a long-term strategic approach to remove the barriers to accessing career and progression opportunities for those from less advantaged groups.

The **attractive tax credit regime, alongside technological change** has been highlighted as a **key driver of the current skills challenges** facing the industry. This highlights the need to build a system that is more responsive to fluctuations in demand and to develop more open recruitment practices to increase the pool of available labour.

Employers feel that new entrants are not set-ready, highlighting the need for closer links between education and industry. This would help ensure that courses are more responsive to the needs of employers, keep up with the pace of changes in working practices and workplace developments, whilst increasing the availability of placements and work experience opportunities. There is also the need to **better inform those seeking to work in the industry** of the career opportunities and pathways available.

4. Supply-side provision mapping

In summary the evidence in this chapter shows that:

- **The film and screen industries are highly attractive for learners**; large numbers undertake learning in aligned subject areas in both Higher Education (HE) and Further Education (FE) courses every year;

- Whilst there are **significant numbers studying in areas which are more vocational** such as film production, computer games and motion picture directing/producing, a **substantial proportion of learning is concentrated in general areas such as media and communication studies which may not be delivering enough technical skills**;

- The pool of learners in HE and FE is **considerably more diverse than the population as a whole on a range of metrics** – gender, ethnicity, and disability – and **more geographically dispersed than the film and screen industries**;

- However, **a number of subject areas are less diverse in terms of their learner populations**. In particular, **gender diversity is low in computer games and high-end computing** and those studying subjects related to **theatre are more likely to be white and have been educated privately** compared to the student population as a whole.

In the face of significant ongoing change affecting the screen industries, it has also been important for this audit to assess the skills infrastructure, delivering the future talent pipeline the industry needs. Mapping what skills and training provision currently exists, and where possible considering where it is located in England and other parts of the UK, and then in turn how this translates into career choices and progression opportunities, is a vital element to understanding how employer demands for skills are currently being met, and if provision is fit for purpose.

This section provides an overview of:

- Higher Education (HE) students;
- Learners at Further Education (FE) establishments and training providers.

4.1. Higher education

4.1.1. Students by volume, level and geography

Data is drawn from the Higher Education Statistics Agency (HESA) and the definition of film and screen related courses developed by Creative Skillset[79]. Higher Education courses are classified using a system called Joint Academic Coding System (JACS). The JACS (version 3) classification allows courses to be grouped and given a hierarchical structure based on the type of course.

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[79] Creative Skillset (2014) *Mapping the Supply of Creative Skillset Relevant Students within Higher Education, A report based on the 2011/12 Higher Education Statistics Agency Student Record*

- In 2014/15 there were a total of **59,400** higher education students studying subjects related to the film and screen industries at UK Higher Education Institutions;
- Of these there were total of 1,100 in **Film Production**, 2,700 in **Media, TV and Radio Production**, and 1,300 studying **Moving Image Techniques/Directing and Producing Motion Pictures**;
- 2,300 students were enrolled in courses related to **post-production activities** including Visual/Audio Effects, Animation, Film and Sounding Recording;
- But, **a substantial share of learning has been in non-vocational courses like media and communication studies**, which account for 40% of film and screen related learning in HE.

Figure 8: HE students by selected grouped subject area, 2014/15

Subject area	2014/15
Film studies	3,100
Media, TV, radio and electronic media studies	7,900
Media, TV and radio production	2,700
Film production	1,100
Computer games	2,500
Visual/audio effects, animation, film and sound recording	2,300
Design, illustration and visual communication activities	14,800
Drama and acting	7,000
Theatre studies, design, makeup, costumes, and management	3,300
Imaginative writing (including script writing)	5,100
Moving image techniques, directing and producing motion pictures	1,300
Cinematography and photography	8,300
Total	**59,400**

Please note data has been rounded to nearest 100.
Source: HESA Student Record 2014/15

Students within film and screen industry relevant courses are proportionally more likely to be studying first degree courses when compared to all students within Higher Education (65 per cent, see Figure 9). Only students enrolled in imaginative writing (including script) courses have a similar proportion studying at postgraduate level (24 per cent) compared to the average (23 per cent).

There is a significant risk that these more general courses, whilst providing a broad overview of what is a considerable sector, may be deliver less industry-specific skills needed particularly to meet some of the significant craft and technical skill areas demanded.

Figure 9: HE students by selected grouped subject area and level, 2014/15

Subject area	Postgrad. (research)	Postgrad. (taught)	First degree	Other undergrad
High-end computing	2%	7%	88%	3%
Computer games	1%	5%	90%	5%
Media, TV, radio and electronic media studies	6%	9%	83%	3%
Film studies	5%	7%	87%	1%
Media, TV and radio production	0%	7%	89%	4%
Film production	0%	17%	81%	2%
Design, illustration and visual communication activities	2%	8%	85%	5%
Drama and acting	3%	8%	85%	4%
Theatre studies, design/makeup/costumes, management	1%	9%	80%	10%
Visual/audio effects, animation, film/sound recording	1%	8%	90%	2%
Imaginative writing (including script writing)	3%	21%	75%	1%
Moving image tech, directing/producing motion pictures	0%	6%	88%	5%
Cinematography and photography	1%	8%	87%	4%
Total (all subjects)*	**5%**	**18%**	**65%**	**12%**

*Source: HESA Widening Participation 2014/15
Source: HESA Student Record 2014/15

Figure 10: Selected HE subject area by region, 2014/15
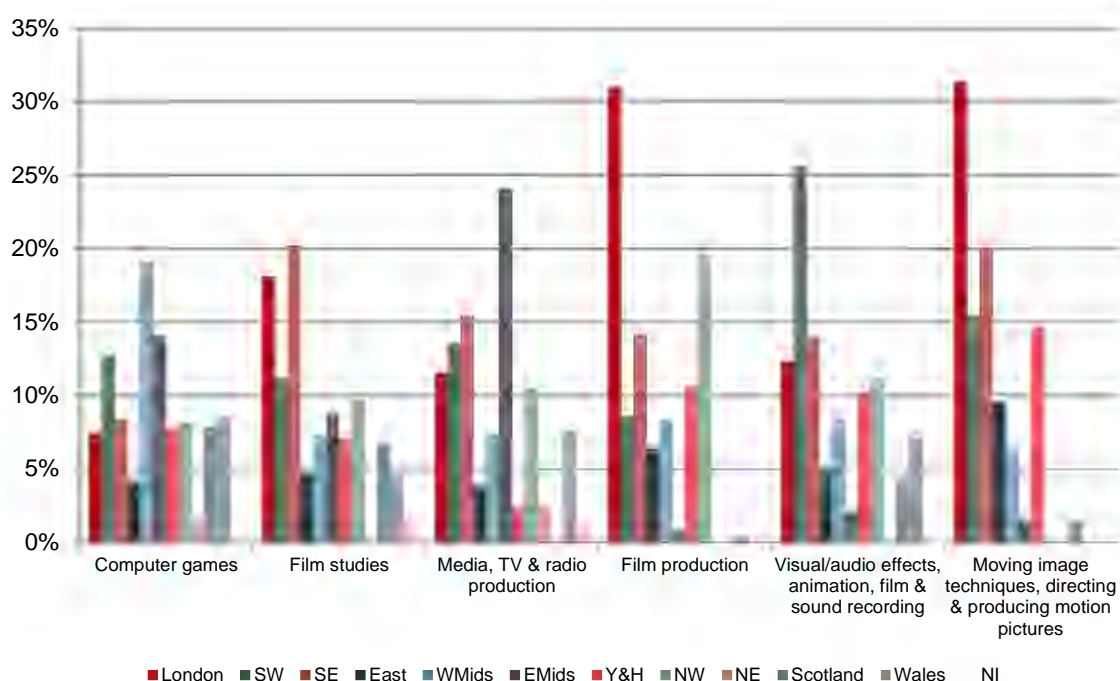
Source: HESA Student Record 2014/15

Each nation and English region within the UK has a substantial number of students studying within film and screen industry relevant courses. However, the research confirms that much of the HE provision is centred in London (as shown in Figure 10, above), highlighting London's status as a centre for creative training (a full breakdown is available in Figure 11).

- Higher education **Film Production** students are heavily concentrated in London (31 per cent of those studying); outside of London there are concentrations in the North West (20 per cent) and the South East (14 per cent);
- **Media, TV and Radio Production** is more distributed but there are greater concentrations in the East Midlands (24 per cent) than the rest of the country;
- **Visual/Audio Effects and Animation** are concentrated in the South West region (26 per cent).

Figure 11: HE students breakdown by subject area and region, 2014/15

Subject area	Scotland	Wales	NI	NE	NW	Y&H	EMids	WMids	East	SE	SW	London
High-end computing	19%	4%	7%	1%	10%	6%	2%	6%	2%	19%	9%	15%
Computer games	8%	9%	0%	2%	8%	8%	14%	19%	4%	8%	13%	7%
Media, TV, radio and electronic media studies	7%	4%	1%	5%	12%	9%	11%	9%	3%	13%	5%	20%
Film studies	7%	5%	2%	0%	10%	7%	9%	7%	5%	20%	11%	18%
Media, TV and radio production	0%	8%	1%	3%	11%	2%	24%	7%	4%	15%	14%	12%
Film production	0%	1%	0%	0%	20%	11%	1%	8%	6%	14%	9%	31%
Design and visual communication activities	6%	5%	1%	7%	8%	6%	6%	8%	7%	10%	12%	24%
Drama and acting	7%	6%	1%	4%	15%	3%	6%	6%	9%	11%	11%	22%
Theatre studies, etc.	5%	7%	0%	0%	6%	12%	6%	12%	2%	6%	11%	33%
Visual/audio effects, animation, film and sound recording	4%	7%	0%	0%	11%	10%	2%	8%	5%	14%	26%	12%
Imaginative writing (including script writing)	2%	8%	1%	1%	17%	6%	5%	6%	5%	16%	12%	20%
Moving image tech., directing & producing motion pictures	1%	0%	0%	0%	0%	15%	1%	6%	10%	20%	15%	31%
Cinematography and photography	6%	8%	2%	3%	7%	6%	8%	4%	8%	13%	15%	22%

Please note columns may not sum due to individual rounding of data
Source: HESA Student Record 2014/15

4.1.2. Students – breakdown of detailed characteristics

The data reveals that across many subject areas there is a relatively even gender split. However, gender breakdown varies significantly amongst some subject areas. For instance only a small minority of **computer game** (16 per cent) students are female with lower proportions also enrolled onto **high-end computing** (27 per cent), **visual/audio effects and animation** (43 per cent), and **film production** (40 per cent) **courses** (see Figure 12).

Men, on the other hand, are under-represented on courses such **drama and acting** and **theatre related subjects**.

Figure 12: Percentage of female HE students by subject area, 2014/15

Subject area	Female (%)
High-end computing	27%
Computer games	16%
Media, TV, radio and electronic media studies	55%
Film studies	49%
Media, TV and radio production	44%
Film production	40%
Design, illustration and visual communication activities	55%
Drama and acting	60%
Theatre studies, design, makeup, costumes, and management	68%
Visual/audio effects, animation, film and sound recording	43%
Imaginative writing (including script writing)	58%
Moving image techniques, directing and producing motion pictures	40%
Cinematography and photography	54%
Total (all subjects)*	**56%**

Source: HESA Widening Participation 2014/15
Source: HESA Student Record 2014/15

Figure 13 provides a breakdown of students by ethnicity (data is available for UK domiciled students only). The percentage of BAME students enrolled onto film and associated screen industry courses is considerably above the all subject average of 17 per cent of students (apart from theatre studies and related courses which has an average proportion).

Figure 13: HE students breakdown by subject area and ethnicity (UK domiciled only), 2014/15

Subject area	White	Black	Asian	Other (including mixed)	% BAME
High-end computing	64%	11%	16%	8%	36%
Computer games	74%	6%	11%	10%	26%
Media, TV, radio and electronic media studies	65%	14%	10%	11%	35%
Film studies	79%	7%	5%	9%	21%
Media, TV and radio production	71%	12%	7%	9%	29%
Film production	71%	11%	7%	11%	29%
Design, illustration and visual communication activities	72%	7%	10%	10%	28%
Drama and acting	77%	9%	3%	10%	23%
Theatre studies, etc.	83%	5%	3%	9%	17%
Visual/audio effects, animation, film/sound recording	73%	9%	8%	10%	27%
Imaginative writing (including script writing)	78%	7%	6%	9%	22%
Moving image tech., directing / producing motion pictures	68%	12%	9%	11%	32%
Cinematography and photography	77%	7%	6%	10%	23%
Total all subjects*	**83%**	**6%**	**7%**	**4%**	**17%**

Please note columns may not sum due to individual rounding of data
Source: HESA Widening Participation 2014/15
Source: HESA Student Record 2014/15

Data is also available on the proportion of students who have attended state school (Figure 14). This clearly shows that the vast majority of students are from a state school background. The only subject areas which have a relatively high concentration of privately educated student intake are the subjects related to drama and acting (11 per cent) and theatre students and related courses (9 per cent).

Figure 14: HE students breakdown by subject area and learner background, 2014/15

Subject area	State-funded school or college	Privately funded school
High-end computing	95%	5%
Computer games	96%	4%
Media, TV, radio and electronic media studies	92%	8%
Film studies	92%	8%
Media, TV and radio production	96%	4%
Film production	96%	4%
Design, illustration and visual communication activities	95%	5%
Drama and acting	89%	11%
Theatre studies, design, makeup, costumes, and management	91%	9%
Visual/audio effects, animation, film and sound recording	97%	3%
Imaginative writing (including script writing)	93%	7%
Moving image techniques, directing and producing motion pictures	93%	7%
Cinematography and photography	93%	7%
Total UK (young entrants)*	**90%**	**10%**

Please note columns may not sum due to individual rounding of data
*Source: HESA Widening Participation 2014/15
Source: HESA Student Record 2014/15

4.2. Further education

The following section presents analysis for the number of **further education learners** in 2014/15. Because this deploys available data from the Skills Funding Agency (SFA), it is relevant only for England. To provide an estimation of the volume of learners studying film and screen related subjects a search of Learn Direct Classification System (LDCS) was undertaken to select relevant codes.[80]

4.2.1. Learners at further education establishments and training providers

Figure 15, below, shows that as with HEI provision there were significant numbers of learners in 2014/15 undertaking courses in Media Studies (25,900) and Communications/Communication Studies (8,600). Also of note:

- There were 1,500 learners undertaking **film/TV/radio production** courses, this figure was dwarfed by the 2,700 learners in **film/TV makeup** courses;
- There were a higher number of learners in **theatre** related courses – the majority concentrated in production (1,900) and wardrobe (around 400) with very small numbers of learners in stage design, theatre electrics and theatrical costumes;

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[80] Please note that this may not pick up all relevant learners but provides an indication of the volume of potential labour supply for the sector

▪ Around 600 learners were taking courses in **computer games** and **computer animation**;

▪ A large number of students were studying subjects in **music technology / production** (10,400) and within this category there are a very small number specifically in Sound Engineering (less than 20);

▪ **Music performance** and the **performing arts** (acting, drama and dance) together accounted for almost 40,000 learners in 2014/15.

Figure 15: FE learners by grouped subject area, 2014/15

Subject area	Number of learners
Film / TV / radio production	1,500
Film / TV makeup	2,700
Theatre production	1,900
Theatre (wardrobe, costumes, design, electrics)	600
Music technology / production	10,400
Computer games / computer animation	600
Media studies (film, TV, radio, broadcasting)	25,900
Communication (visual, media, publishing, studies)	8,600
Journalism / creative writing	1,700
Music performance	10,700
Performing arts (acting, drama, dance)	28,200
Photography	4,000
Printing	800
Arts / culture / heritage administration	500

Please note data has been rounded to nearest 100
Source: SFA Individualised Learner Records, 2014/15

Again, as with HE participation, a substantial share of learning is in non-vocational courses such as media and communication, with this forming 35% of film and screen related learners in FE. Thus there are further risks that the skills delivered are not sufficiently industry specific and meeting requirements in some of the more technical skill areas.

4.2.2. Learners by funding stream

The main funding provider varies for grouped subject areas. The majority of learners studying film, TV, and radio production courses are funded via the Higher Education Funding Council (HEFCE), those studying theatre production are funded via the Skills Funding Agency (SFA), whilst film and TV makeup students are funded by the Education and Skills Funding Agency (ESFA). This is likely to reflect both the level of study, the age of the learner and the concentration of provision at these stages.

Figure 16: FE learners by grouped subject area and funding provider, 2014/15

Subject area	HEFCE	SFA	ESFA	Local Authority	Other	None (tuition fees only)
Film/TV/radio production	81%	6%	9%	0%	0%	4%
Film/TV makeup	0%	16%	63%	0%	1%	19%
Theatre production	20%	11%	66%	0%	1%	3%
Theatre (wardrobe, costumes, design, electrics)	56%	38%	5%	0%	0%	1%
Music technology / production	12%	21%	63%	0%	0%	3%
Computer games / computer animation	79%	5%	14%	0%	0%	2%
Media studies (film, TV, radio, broadcasting)	1%	4%	95%	0%	0%	0%
Communication (visual, media, publishing, studies)	3%	55%	40%	0%	0%	1%
Journalism/creative writing	4%	4%	89%	0%	0%	4%
Music performance	8%	12%	77%	0%	1%	1%
Performing arts (acting, drama, dance)	7%	7%	85%	0%	0%	1%
Photography	31%	37%	19%	0%	2%	11%
Printing	0%	98%	0%	0%	0%	2%
Arts / culture / heritage administration	4%	94%	0%	0%	1%	1%

Please note columns may not sum due to individual rounding of data

Source: SFA Individualised Learner Records, 2014/15

4.2.3. Learners by National Vocational Qualification (NVQ) level

National Vocational Qualifications (NVQ) Level Descriptions

Figure 17 below shows FE learners by NVQ level:

- *Below NVQ Level 2 relates to key skills and Level 1 BTEC, Diplomas and Certificates;*
- *NVQ Level 2 equates to GSCE level and equivalent (i.e. Level 2 BTEC, Diplomas and Certificates);*
- *NVQ Level 3 is A-level and equivalent; and,*
- *NVQ Level 4 and above is HND, HNC and degree level qualifications*

There is considerable variation across the subject areas.

- The majority of **film/TV and radio production** learners are studying towards a higher level qualification (86 per cent at NVQ Level 4 and above). In terms of the types of qualification, learners are evenly split between Higher National Diploma (HND) and Bachelor of Arts (BA) and Foundation Degrees.[81]
- Those studying **computer games/animation** courses are also mainly at NVQ Level 4 and above (82 per cent) around half of which are at Foundation Degree level.

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[81] These are degree level qualifications designed in association with employers – combining academic skills and knowledge with workplace performance and productivity.

- This compares to **media studies** students who are mostly concentrated at NVQ Level 3 (89 per cent), the vast majority of which are studying at A-level.

Figure 17: FE learners by grouped subject area and NVQ Level, 2014/15

Subject area	Below Level 2	Level 2	Level 3	Level 4 and above
Film / TV / radio production	5%	6%	3%	86%
Film / TV makeup	0%	50%	50%	0%
Theatre production	0%	0%	77%	22%
Theatre (wardrobe, costumes, design, electrics)	0%	22%	9%	68%
Music technology / production	10%	2%	73%	14%
Computer games / computer animation	0%	18%	0%	82%
Media studies (film, TV, radio, broadcasting)	2%	8%	89%	1%
Communication (visual, media, publishing, studies)	15%	43%	37%	4%
Journalism / creative writing	0%	0%	94%	6%
Music performance	4%	14%	73%	9%
Performing arts (acting, drama, dance)	4%	8%	79%	9%
Photography	27%	28%	11%	34%
Printing	0%	44%	56%	0%
Arts / culture / heritage administration	0%	54%	39%	6%

Please note columns may not sum due to individual rounding of data
Source: SFA Individualised Learner Records, 2014/15

4.2.4. Age, ethnicity, disability and gender breakdown

Figure 18, below, shows the breakdown of learners by ethnicity, disability status and gender. The following conclusions can be drawn:

- Ethnic minorities are over-represented in the majority of areas, with the exception of theatre production and other theatre activities;
- Women were significantly under-represented in film, TV, radio production related activities, computer games/animation, and music technology and production.

Figure 18: FE learners by grouped subject area and gender, ethnicity and disability status, 2014/15

Subject area	Ethnicity			Disability status	Female
	White	BME	Not known		
Film / TV / radio production	79%	16%	4%	15%	29%
Film / TV makeup	87%	13%	1%	10%	98%
Theatre production	92%	7%	1%	13%	70%
Theatre (wardrobe, costumes, design, electrics)	86%	6%	8%	10%	72%
Music technology / production	81%	17%	2%	13%	17%
Computer games / computer animation	88%	10%	2%	19%	9%
Media studies (film, TV, radio, broadcasting)	80%	19%	1%	11%	56%
Communication (visual, media, publishing, studies)	85%	14%	1%	6%	47%
Journalism / creative writing	86%	13%	1%	16%	71%
Music performance	86%	13%	1%	13%	32%
Performing arts (acting, drama, dance)	84%	15%	1%	14%	71%
Photography	84%	13%	3%	16%	60%
Printing	95%	4%	1%	2%	12%
Arts / culture / heritage administration	82%	17%	2%	10%	53%

Please note columns may not sum due to individual rounding of data
Source: SFA Individualised Learner Records, 2014/15

The majority of learners were under the age of 24 years reflecting the provision of funding.

Figure 19: FE learners by grouped subject area and broad age categories, 2014/15

Subject area	16-19yrs	20-24yrs	25-49yrs	50+ yrs
Film/TV/radio production	47%	38%	13%	1%
Film/TV makeup	71%	12%	17%	0%
Theatre production	81%	16%	3%	0%
Theatre (wardrobe, costumes, design, electrics)	47%	41%	11%	0%
Music technology / production	74%	15%	10%	1%
Computer games/computer animation	44%	42%	13%	0%
Media studies (film, TV, radio, broadcasting)	96%	2%	2%	0%
Communication (visual, media, publishing, studies)	48%	24%	25%	3%
Journalism/creative writing	91%	4%	4%	1%
Music performance	86%	10%	3%	0%
Performing arts (acting, drama, dance)	90%	6%	2%	0%
Photography	32%	17%	37%	13%
Printing	39%	36%	23%	2%
Arts / culture / heritage administration	49%	43%	6%	1%

Please note columns may not sum due to individual rounding of data
Source: SFA Individualised Learner Records, 2014/15

4.2.5. Geographic spread of FE learners

The table below (Figure 20) shows the geographic spread of learners by the broad sub-sector areas. It can be seen that compared to Higher Education provision, Further Education learners are more geographically spread. However, students were concentrated in the following regions:

- Almost a third of those studying **film/TV makeup were concentrated in establishments in the North West**;
- Over a third of those studying **craft and technical theatre related courses were doing so at Yorkshire & Humberside institutions**;
- Over a fifth of those studying subjects related to **computer games/animation were located in the North East**.

Figure 20: FE learners by grouped subject area and region, 2014/15

Region / Subject	NE	NW	Y&H	E Mids	W Mids	EofE	London	SE	SW
Film/TV/radio production	9%	13%	17%	8%	9%	7%	14%	12%	8%
Film/TV makeup	1%	32%	10%	8%	6%	8%	6%	16%	12%
Theatre production	11%	18%	9%	5%	7%	8%	7%	15%	18%
Theatre (wardrobe, costumes, design, electrics)	13%	14%	35%	7%	3%	4%	6%	6%	10%
Music technology / production	4%	14%	8%	9%	11%	8%	12%	18%	13%
Computer games/computer animation	22%	6%	26%	4%	13%	9%	2%	8%	8%
Media studies (film, TV, radio, broadcasting)	5%	19%	9%	6%	9%	9%	12%	21%	8%
Communication (visual, media, publishing, studies)	5%	14%	9%	7%	10%	8%	14%	19%	13%
Journalism/creative writing	0%	13%	9%	9%	6%	7%	11%	24%	20%
Music performance	5%	13%	11%	8%	12%	13%	11%	15%	12%
Performing arts (acting, drama, dance)	4%	18%	10%	7%	10%	8%	13%	19%	9%
Photography	10%	19%	11%	8%	10%	8%	14%	14%	5%
Printing	11%	17%	12%	16%	5%	10%	4%	12%	11%
Arts / culture / heritage administration	10%	16%	6%	3%	10%	10%	28%	10%	5%

Please note columns may not sum due to individual rounding of data
Source: SFA Individualised Learner Records, 2014/15

4.3. Targeted skills provision and bespoke programmes

The sector is supported by two Sector Skills Councils (Creative Skillset and Creative & Cultural Skills, of which the former is of most relevance to the screen industries), as well as the Creative Industries Partnership[82]. Creative Skillset, in its role as the body leading training policy and allocating funding for the creative sector, co-ordinates a range of provision to meet the sectors skills and labour needs. The skills needs are further supported by the voluntary skills levy which was set up in 1999, to encourage skills investment amongst those companies in the film industry benefiting from tax reliefs.

These various skills provision initiatives are too numerous to summarise here; however, from our analysis some broad conclusions can be drawn:

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[82] See: https://www.gov.uk/guidance/industrial-partnerships-an-overview

- there is a huge array of initiatives, many of which only support a very small number of participants;
- there is evidence of duplication, fragmentation, as well as gaps and questions around long-term sustainability; and,
- whilst the lack of workforce diversity has been identified as the biggest challenge facing the sector there lack a cohesive set of initiatives to tackle this challenge.

4.4. Implications

These findings suggest that there is **a clear need for better careers information advice and guidance** to inform learners of the skills needs, and career opportunities available, in the screen industries.

There is a large potential source of supply with the screen industries attracting many learners. But, with significant skills shortages too, there is clearly a skills mismatch, raising questions about the relevance of some of this more general provision. This highlights the need for **stronger links between educators and industry** to ensure learners are studying the right things and hence are equipped with the future skills that the industry needs.

Whilst the potential pool of labour is very diverse, the industry itself is not, this highlights the **large barriers facing those from non-traditional backgrounds** from getting in to the industry. This emphasises the need for strategic, coordinated and intensive action to address the diversity challenge.

The evidence suggests there is **a real opportunity to better link the supply and demand for skills in areas outside of London and the Greater South East.** Despite Higher Education provision being concentrated in and around London there are significant concentrations of film and screen education in other parts of the country that could, if linked with new and existing film clusters, help build supply of labour.

5. Tackling the skills challenges: strategic priorities and delivery

This research has shown that businesses in the film and screen industries **struggle to access the skills and talent that they need and as such significant skills shortages have been reported**. Yet, at the same time the sector is highly attractive, with a **large potential supply of diverse labour**. Thousands of learners undertake study in subjects aligned to the screen industries in both Further and Higher Education each year. But, a substantial share of this learning is in more general non-vocational courses (such as media and communication studies) which risk not delivering the industry-specific skills needed, particularly in craft and technical roles. This **highlights a fundamental mismatch in the demand for, and the supply of, labour in the screen industries** as well as the existence of **substantial barriers to entry**, particularly for those from less advantaged groups.

Taking this forward not only requires leadership from the industry but long-term strategic and collaborative action with Government, providers, trades unions and wider industry partners working together to: pool expertise and resources; address persistent market failures; coordinate activity; leverage additional investment; and co-design new solutions whilst also maximising the value of existing mainstream provision.

We have identified five strategic priorities that will be crucial to tackling these challenges and delivering the skills and talent base to support the ongoing success of the screen industries:

1. **Enhancing provision.** Mainstream education for the screen industries is fragmented and failing to deliver the skills needed by the sector. It is vital to **simplify and build a more coherent, responsive skills infrastructure**; supporting wider reforms to technical education and involving industry to ensure quality and trusted accreditation of courses.

2. **Attracting and cultivating talent.** Young people lack a true understanding of the screen industries; the breadth of roles available and the career paths that exist. The sector must **enhance awareness and understanding of education, training, employment and progression opportunities** to draw new and diverse talent to the industry.

3. **Driving diversity.** The evidence reveals ongoing, and in some cases worsening challenges around diversity. It is essential the industry **improves the recruitment, retention and advancement of women, BAME, disabled people and those from less advantaged backgrounds** to remain economically and creatively competitive.

4. **Building bridges.** Few learners progress directly from education into employment and employers report a lack of 'set readiness' amongst new entrants. The sector must build on and strengthen linkages between initiatives that **support learners transition from education to work and maximise reforms to Apprenticeships** in order to 'open the door' to the screen industries.

5. **Professional development.** The research highlighted a lack of clarity of the training and qualifications required for career progression and a shortage of professional, business and leadership skills. **Strengthening the skills of workers and business leaders in the screen industries** will be central to improving absorptive capacity and supporting growth of indigenous businesses.

5.1. Delivery plan

Delivering these aspirations will require a cohesive package of measures to drive change. We recommend three major, industry-wide, change programmes to meet these pressing priorities (see Figure 21).

Figure 21: 3 Major Programmes of Change

5.1.1. Programme 1: Overhaul the skills infrastructure

The success of the screen industries has gone hand-in-hand with a growing need for talent. But with skill shortages widespread across the industry, difficulties recruiting talent outside of the capital, and a lack of 'set readiness' amongst graduates, it is clear that the supply of skills has failed to keep pace.

At the same time, the Government's Industrial Strategy challenges industry to bring forward proposals, via new 'Sector Deals', that will transform and upgrade their sector and address shared challenges and opportunities, including measures that accelerate growth, support the development of clusters and boost skills.

This creates a considerable opportunity for the industry to clearly articulate what it needs and to redesign the skills infrastructure, so that it works better for screen, by:

- Overhauling Careers Education, Information, Advice and Guidance (CEIAG) for the sector by extending the remit of IntoFilm to include careers education and developing a coherent suite of industry-designed, audience-specific CEIAG resources.
- Building a critical mass of diverse talent in cities and city-regions outside of London and the South East through a new Creative Clusters Skills Catalyst Fund to

accelerate investment in the development of internationally-recognised centres of world-class craft and technical education.

- Making Apprenticeships work for screen, ensuring the industry retains investment made through the Apprenticeship Levy; developing new Apprenticeship Standards and establishing an Apprenticeship Training Agency to provide additional flexibilities that accommodate short production cycles and a freelance workforce.
- Investing in mechanisms that send clearer signals to the market. This should include regular research that provides a coherent picture of future demand for skills, existing shortages and changing needs. It should also feature refreshed kite-marking / accreditation, that signposts employers and learners to the providers and courses that will ensure they are best placed to succeed in the industry.

5.1.2. Programme 2: Driving diversity

To finally tackle the long-entrenched issue of diversity in the screen industries will require a bold and unwavering approach; a clear commitment to bringing thousands more people from diverse backgrounds into the screen industry.

This programme of change will:

- Create the right conditions so that all UK productions can voluntarily adopt the BFI Diversity Standards.
- Build on and further professionalise the BFI Film Academy, continuing to ensure that participants are from a range of diverse backgrounds.
- Invest in new industry-wide diversity programmes that offer a holistic mix of support to enable those from diverse backgrounds – including women, BAMEs, those with a disability, LGBT and those from less advantaged backgrounds – to overcome barriers and enter, remain and advance within the UK screen industries.
- Ask businesses across the screen industries to commit to delivering real change in their organisations. To take a fresh look at their workforce and their working practices. To set themselves diversity goals and openly publish data on the makeup of their cast and crew. To actively support industry diversity programmes.

5.1.3. Programme 3: Continued professional development

The final programme of change focusses on strengthening the UK screen industry – arming both businesses and workers with the talent and skills they need to be successful in the increasingly dynamic, competitive and global marketplace.

This programme of change should:

- Create a new CPD Gateway that will signpost employers and workers to industry-accredited CPD courses.
- Trial Job and Learning Hubs at major studios, offering recruitment and training services that enable businesses to 'crew-up' quickly and workers to continue their professional development.
- Develop a new 'bite-sized' business education programme comprised of shorter, industry-specific business management courses or 'mini MBAs' that are reflective of the time and cost constraints of SMEs.
- Invest in a new industry-wide BFI Leadership Talent Programme that seeks out the brightest leadership talent in the screen industries and offers masterclasses, networking opportunities and ongoing mentoring.

5.2. Final thoughts

These recommendations are deliberately targeted; with fewer, bigger programmes that will deliver greater impact. They aim to tackle the underlying issues; addressing the root cause, rather than treating the symptoms. They seek to emulate best practice; learning from what has worked in other industries and other countries. And they are unashamedly ambitious; reflecting the scale of the challenge and the risk these critical skills issues pose to productivity and growth.

While some of the challenges identified by the skills audit are unique to the screen industries, others are shared by businesses operating in different sectors or reflect overarching weakness in the way we deliver education in this country.

Our recommendations therefore recognise that much change is already afoot in the skills sector – not least with the expansion of Apprenticeships, the reform of post-16 technical education, and the review of careers information and advice – and that skills are central to delivering the Government's Productivity Plan and Industrial Strategy; realising ambitions to deliver a stronger, fairer UK economy that works for everyone.

It will be important that the industry fully embraces these reforms, working in partnership with Government to drive forward change; to clearly articulate the needs of the sector, make sure the changes work well for the industry and position it as a trailblazer for reform; to build the stronger, more coherent, responsive and agile skills system needed to enable the growth of the UK screen industries in the years to come.

Appendix A: Stakeholders

The Film Skills Industry Task Force
The BFI's Film Skills Industry Task Force is comprised of a range of stakeholders from across the film and screen industries, covering all aspects of the value chain.

- **Barbara Broccoli OBE**, EON [chair]
- **Alex Hope OBE**, Double Negative
- **Faiza Hosenie**, Big Talk Productions
- **Seetha Kumar**, Creative Skillset
- **Damian Jones**, DJ Films
- **Callum McDougall**, Assistant Director and Production Manager
- **Fiona McGuire**, Pathé UK
- **Amanda Nevill CBE**, British Film Institute
- **Ben Roberts**, British Film Institute
- **Marc Samuelson**, Samuelson Productions
- **Iain Smith OBE**, Applecross Productions / Film Skills Council

Stakeholders interviewed
The following table provides a breakdown of the 41 interviewees by their position in the value chain.

Value Chain	No. of individuals consulted	Type of stakeholders
Education/ Prof. development / Prof. body	5	Colleges/Universities; BFI; Creative Skillset; Production Guild
Production	19	Art Director, Camera, Construction, Costume, Director, Line producer, Hair & makeup, Producer, Production designer, Script supervisor, Stunt coordinator
Post-Production	3	Visual Effects, post-production professionals
Distribution	3	Distributors
Exhibition	2	Exhibitors
Other / Cross value chain	9	Devolved nations screen bodies, Consultants, Agents

The research also included **four focus groups**, this included two specifically focused on diversity, one for female participants and another looking at current and future employment and skills challenges. Through the focus groups we engaged with a further 60 stakeholders from across the value chain.

Reviewers

This report has been reviewed by a number of organisational stakeholders from across the film value chain. We would like to thank them all for their input.

- National Film and Television School
- Pinewood Studios
- Arts and Humanities Research Council
- BECTU (Broadcasting, Entertainment, Cinematograph and Theatre Union)
- Directors UK
- BFI EU Skills Sector
- Production Guild
- Film Distributors Association
- Oxfordshire Local Education Partnership
- No 10 Policy Unit
- Pathé UK
- Birmingham and Solihull LEP
- Department for Culture Media and Sport
- Cultural Office, Mayor of London
- Creative Scotland
- Screen Yorkshire
- Sky TV
- Guild of British Camera Technicians
- University of York
- Hartswood Films, High End TV Council

We would also like to thank all the freelance professionals who supported and reviewed this work.

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