

Segment One

Sector: TV and Film Production

Executive Summary:

The key characteristics of the skills system for Film and TV Production Sector include.

- Need for more management training at all levels and disciplines across the sector. (this is to include soft skills training for new entrants)
- Better defined progress routes for a number of sector roles.
- Increasing diversity is key for the sector (even more relevant to the organisations based in the LTRS project region.)
- Highly regarded courses from peers and experts are sought after.
- Meet and utilise changing technology requirements.

Main challenges for supply and demand,

Supply – Providers find it difficult to engage with the sector in a coherent way, with the sector trusting peer relationships and sector expertise over traditional providers.

The film and screen industries are highly attractive to learners, with many thousands studying subjects aligned to the sector in both further education (FE) and higher education (HE) each year. However, a substantial share of this learning is in non-vocational courses like media and communication studies, which account for over 35% of film and screen-related learners in FE and nearly 40% studying film and screen-related courses in HE. **These more general courses – though providing a broad overview of what is a considerable sector – may fail to deliver the industry-specific skills needed, particularly for craft and technical roles.**

Indeed, while skills shortages are most pronounced in craft and technical roles (with the exception of film and TV costume and make-up), there are few learners undertaking study in these areas. This issue is particularly pronounced when we consider VFX – a sector suffering a severe shortage of skills – with only around 2,300 learners studying VFX and animation courses at HE level, equivalent to less than 4% of those studying 'screen-aligned' disciplines.

The research suggests there are highlights in the quality and relevance of provision, but much specialist education at HE level is London-centric.

Consultations with employers found:

- Provision to be fragmented;
- A lack of consensus on the best courses;
- A failure to equip learners with the skills they need to be successful in the industry; and
- Concerns that careers education inadequately captures the 'business of film' and the broad range of roles available within the industry.

(future-film-skills-an-action-plan-2017.pdf, BFI)

In short, the evidence suggests the skills infrastructure is failing to deliver the supply of skills needed to enable growth of the screen industries.

The sector trusts peer organisations such as ScreenYorkshire at regional level and national representative organisations such as NTFS, ScreenSkills and BFI.

Demand – The sector has a **variety of training demands for that can differ vastly from organisation to organisation**. This can be difficult to articulate to providers. In addition there are a number of very specialist courses that are difficult to source.

Skills Service data indicates **there are trends for certain types of training** from across the region, these could be tackled first.

Current Capacity and Capability of the provider network in the Leeds City Region. The **current capacity for the provider network is good**, the key requirements for the providers' aggregate demand to ensure courses can be cost effective, part funding can support this but technology solutions must also be embraced.

Capability of the provider network is more complicated. The network needs to more **effectively understand how to engage with businesses in the sector**, how to access them, how to support them. The network must be encouraged to engage in non-traditional ways, the network must understand the flexibilities of delivery that are required by these sectors employers.

Key Findings/Conclusions

- Increase the Diversity of Workforce,

The majority of business leaders would like to see the diversity of the workforce (particularly relevant to the LCR). Increasing diversity through **raising awareness of opportunities in the sector** is critical in order to drive the change in attitudes and cultures that is needed in order to avoid skills shortages in the future.

Employers feel that schools, as well as colleges and universities also have a role. Much more could be done to make young people aware of the diverse range of careers available in the creative and cultural sector, and in the business-orientated vocations that may appeal to a more diverse range of young people in particular.

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. **(Skills Audit Report 2017, BFI)**

Raising awareness of other careers in the creative and cultural sector would help to boost a young person's employment prospects while also addressing future skills needs.

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 highend 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.

(Sector Conclusions from, Skills Audit Report 2017, BFI)

- Aggregate demand from a variety of sub-sectors, so courses that are scheduled are delivered

A major issue – particularly for small employers – was simply **not being able to afford to take on staff to fill the skills gaps that they had identified.** For sole traders and small employers, filling skills gaps by hiring specialist staff or upskilling their current workforce was not financially viable.

- Additional Flexible Delivery methods, e.g. online delivery

Some employers also felt that skills gaps existed in their organisation because they lacked the capacity to release staff to attend relevant training courses. Small organisations with frontline staff in particular struggled to cover training time, so upskilling current staff to fill identified gaps was difficult.

- Improve Career Pathways and CPD

Learners lack awareness of the career opportunities available in the screen industries. Despite being central to plans for skills reform and offering an opportunity for students to 'earn while you learn', very few people enter the industry via Apprenticeships. This is due to the **few Apprenticeship standards directly aligned with the film industry**, the challenges associated with making the model work for screen and the strong prevalence of informal recruitment processes

Find out more about the TV and Film Production Collaborative Skills Partnership and get in touch through - <https://www.westyorkshirecolleges.co.uk/contracted-projects/lets-talk-real-skills/tv-and-film-production>