

SW REGION SECTOR SUMMARY

SKILLSET

SECTOR FOOTPRINT

Skillset is the Sector Skills Council for the Audio Visual sector, including TV; radio; film; video; interactive media; computer games; animation and photo imaging (www.skillset.org).

- Pathfinder to produce Sector Skills Agreement – completed SSA in April 2005 for film, television and interactive media industries.
- There will be another SSA for interactive media, computer games, animation and photo imaging.

SKILLSET LABOUR MARKET

Sources: SkillsSet research. Sector (NB data excludes cinema exhibition, film production, photo-imaging, freelancers not employed at the time of the survey and performers); Labour Market Intelligence Fact Sheet, Skills for Business Network2006; SLIM Sector Balance Sheet June 2008, NESS 2007 data derived from LSC SW research team.

Sector Size

- It is estimated that the sector footprint constitutes 1,630 workplaces in the SW.
- An estimated 10,700 work within the sector equating to 0.4% of all SW employment.
- Skillset estimates that 19,600 people are employed in the audio visual industry in the South West (excluding cinema exhibition).
- There are a large number of SMEs: 90% have a workforce of less than five and 98% employ fewer than 25. Only 19 establishments in the region have a workforce of over 100. The sector has a high proportion of freelancers (57% nationally).
- Most audio visual sectors have a GVA per head of at least twice that of the economy as a whole. In some cases it is several times higher than that. Economic forecasts suggest that it will continue to grow.
- The South West contains one of the largest concentrations of employment in Photo Imaging in the UK - estimated to be 12,100 people, which is 35% of the SW Skillset workforce.

Profile of workforce

- Nearly three-fifths of the workforce (59%) is employed as associate professionals compared to an average for the SW as a whole of 14%.
- 68% of the workforce in this sector in the SW is male and 32% female.
- The industry has an older and pre-dominantly graduate entry workforce; in the SW 64% graduates, 18% post-graduates.

Vacancies & recruitment

- Employing establishments within Skillset in the SW reported 121 vacancies in 2007, accounting for less than 1% of the total number of vacancies in the region.
- Of those vacancies 45% were hard-to-fill, higher than the overall average for the SW of 35%.

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- In 2007 there were 50 vacancies that were as a result of skills shortage accounting for 40% of all vacancies. Skills shortage vacancies also account for 89% of all hard-to-fill vacancies, higher than the SW average of 62% and the highest of all SSCs.
- 13% of Skillset establishments in the SW reported skills gaps amongst their existing workforce, marginally lower than the regional average of 16%.

Qualifications in the workforce

- Mainly graduate entry, but considering Apprenticeships route in some sub-sectors. 47% of the workforce are qualified to Level 4+ compared to an average for all industries in the SW of 31%.
- 58% of Skillset establishments in the SW provided on or off the job training in the 12 months prior to the NESS07 survey, 10 percentage points lower than the average for all industries as a whole in the SW (68%).

KEY DRIVERS AND ISSUES

Sources: LSC web SSC web SSA RDA, JCP, HE issues/ plans

- Creative Industries is an important regional sector as identified in the RES
- Skillset have a qualifications strategy, but do not have a list of preferred qualifications. Quality not quantity is their message in relation to FE. Skillset are keen to build better relationships between providers and the industry where there is a proven demand for skills
- Consultation with industry and education partners is currently taking place on the development of 14-19 Specialised Diploma in Creative and Media to be ready for launch in September 2008. This is being developed in conjunction with Skillfast and Creative & Cultural Skills SSCs
- The sector suffers from over-supply and is far from enamoured with current qualifications and structures in media
- Information, Advice and Guidance (IAG) is important to the sector
- Skillset delivers its own face-to-face guidance service through 36 industry freelancers, trained as Careers advisors. All Skillset industry-based freelance advisors have an understanding of the Audio Visual industry UK-wide, as the workforce is predominantly freelance and highly mobile. Other IAG services include information and advice by phone and e-mail, through learndirect and their telephone advisors
- Skillset's IAG service is able to communicate the industry skills needs, however, accurate and consistent IAG is required in schools, colleges, and career agencies; Skillset is working with careers advisors within FE/HE, nextstep and Connexion services, offering them support using labour market information and providing opportunities to meet with industry practitioners
- A key issue for the South West is the retention of talent, which has a tendency to migrate to London
- There are a high proportion of graduates and freelancers who require training. Both groups are not currently easily covered by LSC core funding

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- There is a mandatory levy for the film industry and a discretionary levy for TV companies; approximately £2.5m is collected per year. This is managed by Skillset and funds freelance and new entrants training, including some programmes delivered by South West Screen (see 1.8 below)
- Skills for Life and Level 2 demand are not mentioned in the Sector Skills Agreement, it is thought that there is little demand for these courses
- Skillset will be part of the Higher Level Skills pilot in the SW.

NSAS/COVES /14-19 DIPLOMA/HE (NATIONAL SKILLS ACADEMIES AND CENTRES OF VOCATIONAL EXCELLENCE)

Sources: LSC website. Skillset's Academy Strategy.

Skillset have their own Academies' strategy for FE and HE that is separate from the National Skills Academies. The first round of Skillset's Academies were the Screen Academies, of which the SW has the only one in England outside the London area; the Arts Institute Bournemouth was awarded in July 2005 and received £500k for development. The Screen Academies provide a mix of creative and commercial skills needed by the industry and are part of the UK Films Skills Strategy 'A Bigger Future'.

The Skillset Academies will cover all other areas of the Audio Visual sector other than Film. Three exist in the SW region, they are Gloucester, Cornwall and Bournemouth. The criteria and emphasis for this network is quality, innovation, and industry links, and hence there is no limit or target for the number of Academies and there is no money attached. The core aims and principles of these Academies are to:

- Be seen as leaders in the deliver of high quality, practice oriented education and training
- Design and deliver excellent education and training programmes, qualifications and curricula that meets current and future sector needs
- Be centres of innovation and creativity, providing new methods of learning so that students and professionals are equipped with the skills and knowledge of the sector in which they will be/or are working
- Build and work with a wider network of institutions and learning providers so that new thinking, new methods and higher standards all work to the benefit of providers, learning and employers
- Promote equality and diversity by tackling barriers faced by some groups in gaining entry into the industry
- Tackle skills and development needs and requirements with the industry by helping to shape training and education to create a workforce for the future.

More details are available at: (<http://www.skillset.org/training/approvals/academies/>)

In addition to Academy status, Skillset also has two other significant industry approval mechanisms for suppliers: Industry Approved courses and Industry Approved Training Suppliers

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There are two CoVES in the SW: a Pathfinder CoVE at the Arts Institute, Bournemouth, in Lens-Based Media; and a Round 1 CoVE in Digital and Broadcast Media at Wiltshire College, which was established in March 2003.

KEY EMPLOYERS

- There are 85 cinema screens in the SW, concentrated in Bristol, which had 51 screens in 2003 - 60% of the total.
- Post-production, whilst not as large as others in the SW, is an important sector. Films@59 in Bristol was voted top UK regional post production house
- BBC Bristol includes both Specialist Factual Programming and the Natural History Unit. ITV Westcountry is based in Plymouth and broadcasts to Cornwall and Devon and to much of Dorset and Somerset. ITV West, the Channel 3 commercial terrestrial broadcaster for the West of England, is based in Bristol
- There are around 50 radio stations broadcasting across the region including 8 BBC local radio stations plus two covering Guernsey and Jersey
- The interactive media sector in the SW is centred around clusters of high-quality activity, mainly Bristol, Bath, and parts of Wiltshire and Gloucestershire. E3Media is ranked third in the Design Week's league table of digital companies and is based in Bristol
- The South West is known nationally and internationally for its strength in animation, based largely on the success of Aardman Animations, based in Bristol, but also due to the considerable number of smaller animation companies across the region
- The region currently has one operational film studio in Cheltenham, plus a number of other smaller film studio facilities.

LOCAL AND REGIONAL PROJECTS/NETWORKS

SW Screen is the South West's Regional Screen Agency partly funded by SWRDA. They deliver a number of projects and are Skillset's Industry Approved Training Provider in the SW.

WEST AT WORK - an ESF project since June 2006. West at Work is a strategic partnership project which will work to increase productivity in the West of England by promoting the development of a Flexible Labour Market, effectively Linking the Supply and Demand. SW Screen hold the contract.

GMG Train Sept 05 – Dec 07. This project provided access and promotes engagement in new media skills in Gloucestershire for individuals/the self-employed. Sited at Cheltenham film studios with provision for 180 beneficiaries, it is part of a wider business plan with RDA, Skillset & SW Screen.

Profit through People (Business Link). This project aims to work with SME's, in key economic sectors in Gloucestershire, to identify companies who would benefit from involvement in a business improvement programme, which includes business focused workforce development activities, resulting in the achievement of Level 3 qualifications. Sept 04 – Dec 06.

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In Tune. To identify and engage 130 young people in Gloucestershire in years 10 & 11 and 16 – 17 year old NEETS (Not in Employment, Education or Training) and engage them in a course of music orientated performing arts. The objectives of this project are to: improve the behaviour of the young people, for 65 young people to attain an NCFE Level 1 Certificate in Technical Theatre, and for 90 young people to progress into some other form of learning or employment. This is running at Stroud College from Feb 06 until Dec 07.

Arts Institute in Bournemouth is developing a Foundation Degree in Graphic Design with Multimedia, as part of a partnership with advanced engineering/marine developments across HE/FE providers. This course has now been validated and they recruited the first students to start in September 2007.

Arts Institute in Bournemouth and Plymouth College of Art and Design were also used as best practice examples for the development and promotion of a new Foundation Degree in Photo Imaging.

5 Media Business Clusters which act as formalised networks. Four have been established in the South West (Plymouth, Gloucestershire, Wessex and Bristol) with a fifth cluster emerging in Cornwall. Between them they have 2000+ media businesses as members, as well as some public agencies.

SUMMARY OF SUPPLY

Source: LSC IPOL data (ILR extract)

*Analysis of further education and work based data by Sector Skills Council footprint is not yet available for 2006/07. The data presented below relates to Train to Gain funded activity. The qualifications listed are generic, and therefore cannot be reliably attributed to a specific sector. However, it is likely that some of this activity will relate to this sector.

Not aligned to a particular SSC Starts 06/07		
Starts	Certificate in Adult Literacy*	124
	Certificate in Adult Numeracy*	89
	NVQ in Business and Administration*	391
	NVQ in Customer Service*	834
	NVQ in Management*	88
	NVQ in Team Leading*	361
Total Starts		1,887

Train to Gain planned provision

The LSC has commissioned 79 providers across the SW to deliver 19,968 Level 2 starts in year 2006/7, of which 38 starts were profiled for the Media & Design funding category level 2. However, this provision will only be funded in response to direct employer demand via the Skills Brokerage and so it will be dependent on how demand drives the delivery.

HEFC Activity

Skillset recognise that 67% of people employed in the sector are of graduate level. Skillset are actively engaged with the Higher Level Skills Pathfinder Project in the SW with particular interest in the creative industries theme.

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Foundation Degree Activity

Skillset has undertaken a great deal of work to support the development of Foundation degrees. In particular it has developed 'Frameworks' to enable institutions to develop programmes that are based on industry needs as expressed by employers. 3 Frameworks have been developed to date and it is expected that more will come onstream in the future. Institutions across the SW have adopted Foundation Degrees within the field of Media. These include PCAD, Wiltshire, College, Arts Institute Bournemouth and Weymouth College.

Arts Institute Bournemouth is used as a case study in relation to the introduction of Foundation Degrees in the Skillset Website http://www.skillset.org/qualifications/foundation/article_3328_1.asp

SUMMARY OF DEMAND

11% of employers in the SW reported having at least one vacancy, which is lower than the regional average for all sectors of 17%. 1% reported having skill shortage vacancies - the SW average for all sectors is 3%.¹

65% of the Audio Visual Industries' workforce within the SW reported a training need during the last Skillset Survey (excluding cinema exhibition, film production, photo-imaging and performers).

There is a need to ensure that learners are being taught the right skills, as employers have criticised courses for this.

82% of the workforce is made up of graduates or post-graduates. Demand for Level 3 qualifications would be in the area of Broadcast Technicians.
