



2015 EMPLOYMENT SURVEY

CREATIVE MEDIA INDUSTRIES

MARCH 2016

1 CONTEXT

1.1 Background

The last Creative Skillset Employment Census was conducted in 2012, aiming to capture information across most of the sectors covered by Creative Skillset. Data were then combined with information from other sources to generate an overall picture of employment across the creative industries.

However, there were varying sector response rates – and issues arose when classifying organisations operating across more than one sector, reflecting workforce fluidity within/between sectors and interpreting overall data across the diverse creative industries. Additionally, the tax credits introduced for film production, high-end television, animation and games have had a workforce impact across sectors which previously generated relatively low Census responses.

1.2 Approach to the 2015 Creative Skillset Employment Survey

The Survey research was conducted in Autumn 2015. Working collaboratively with industry partners a sector-targeted approach was taken, with an emphasis on maximising the response across key and previously under-represented sectors – including VFX and post-production, which directly support film production, high-end television, animation and games.

Employers from the targeted sectors were asked to report their numbers of employees and freelancers in specific occupational groups, along with the numbers of women and of those from Black, Asian or Minority Ethnic (BAME) groups.

1.3 Data analysis, weighting and presentation

The final employment estimates for each sector were calculated by applying appropriate weighting factors. Secondary data sources were used to inform and sense-check all weighting calculations and employment estimates (with employment estimates rounded to the nearest 50). Employment or representation is reported as zero where the employment figure has been rounded down to zero or where respondents reported no workforce in that category.

It is advised that no assumptions are made in relation to data from Creative Skillset Censuses, as the 2015 Survey data were collected and analysed differently.

For reference: women currently represent 51% of the UK population¹, 47% of the UK workforce², and 45% of the UK workforce³. People from BAME groups represent 13% of the UK population⁴, 10% of the UK workforce⁵ and 35% of London's workforce⁶.

¹ UK 2011 Population Census (Office for National Statistics)

² Labour Force Survey, October-December 2015 (Office for National Statistics)

³ Labour Force Survey, October-December 2015 (Office for National Statistics)

⁴ UK 2011 Population Census (Office for National Statistics)

⁵ Labour Force Survey, October-December 2015 (Office for National Statistics)

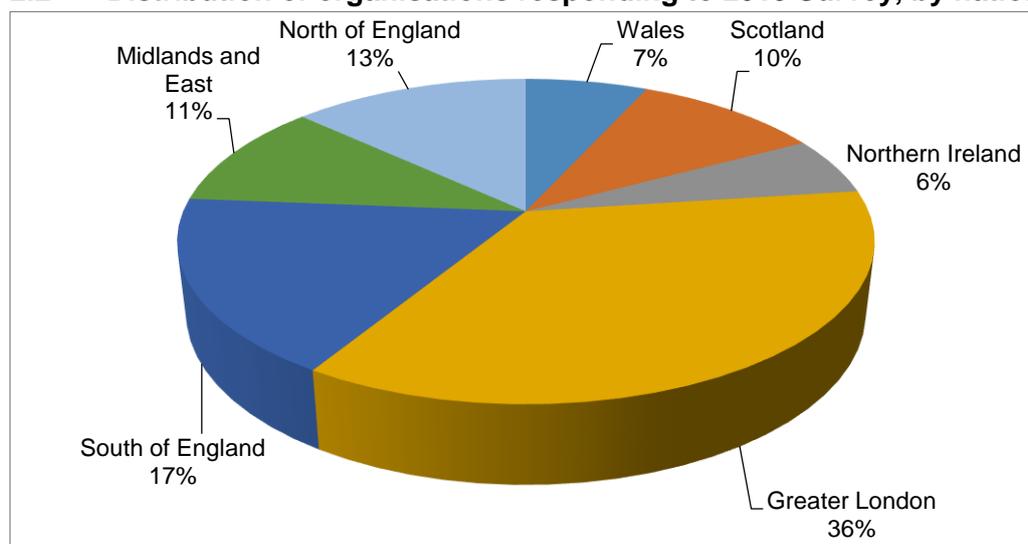
⁶ Labour Force Survey, October-December 2015 (Office for National Statistics)

2 KEY FINDINGS

2.1 Response by sector – 2015 Survey (2012 data included for reference)

SECTOR	SUB-SECTOR	RESPONSE (n)	
		2012 Census	2015 Survey
Television	Terrestrial Broadcast	5	7
	Cable and Satellite	9	9
	Independent Production	145	93
Radio		50	162
Post-production		47	22
Film	Production	N/A	19
	Sales & Distribution	8	28
	Exhibition	32	122
Animation		31	67
VFX		10	22
Games		34	104
TOTAL		371	657

2.2 Distribution of organisations responding to 2015 Survey, by nation and region

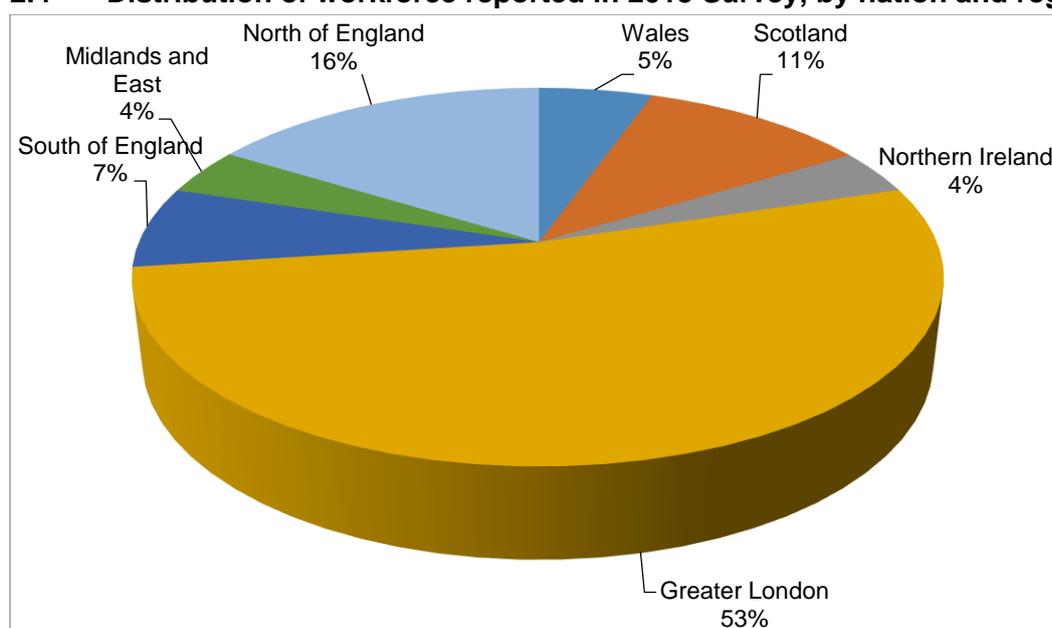


Base: responding organisations

2.3 Total estimated workforce, by sector – 2015 Survey (2009/2012 data included for reference)

SECTOR	SUB-SECTOR	EMPLOYMENT (n)		
		2009 Census	2012 Census	2015 Survey
Television	Terrestrial Broadcast	15,750	16,650	19,350
	Cable and Satellite	12,700	12,300	12,000
	Independent Production	21,700	21,650	27,300
Radio		19,900	13,500	13,550
Post-production		7,450	8,900	8,650
Film	Production	N/A	N/A	14,600
	Sales & Distribution	1,200	1,200	6,100
	Exhibition	17,650	17,700	17,450
Animation		4,300	4,600	7,750
VFX		6,900	5,300	10,000
Games		7,000	5,500	10,300
TOTAL		114,550	107,300	147,050

2.4 Distribution of workforce reported in 2015 Survey, by nation and region



Base: estimated workforce reported by responding organisations

2.5 Proportion of freelancers in workforce, by sector – 2015 Survey

SECTOR	SUB-SECTOR	FREELANCE (%)
		2015 Survey
Television	Terrestrial Broadcast	25
	Cable and Satellite	36
	Independent Production	52
Radio		15
Post-production		31
Film	Production	89
	Sales & Distribution	5
	Exhibition	3
Animation		52
VFX		8
Games		16
All-Sector Average		43⁷

⁷ Indicative percentage only – due to methodology and weighting. Caution is advised when comparing against other percentages or when reviewing trends over time.

2.6 Representation of women – sector-wide and in senior/executive team – 2015 Survey

SECTOR	SUB-SECTOR	WOMEN (%)	
		All	Strategic Management/ Executive Team
Television	Terrestrial Broadcast	50	39
	Cable and Satellite	32	24
	Independent Production	47	46
Radio		46	24
Post-production		24	34
Film	Production	34	31
	Sales & Distribution	48	17
	Exhibition	48	37
Animation		30	28
VFX		26	29
Games		19	27
All-Sector Average		39⁸	N/A ⁹

⁸ Indicative percentage only – due to methodology and weighting. Caution is advised when comparing against other percentages or when reviewing trends over time.

⁹ Figure not available due to sample sizes and weighting.

2.7 Representation of those from BAME groups – sector-wide and in senior/executive team – 2015 Survey

SECTOR	SUB-SECTOR	BAME (%)	
		All	Strategic Management/ Executive Team
Television	Terrestrial Broadcast	9	4
	Cable and Satellite	13	9
	Independent Production	7	6
Radio		9	5
Post-production		5	1
Film	Production	3	0 ¹⁰
	Sales & Distribution	8	3
	Exhibition	4	3
Animation		3	4
VFX		7	6
Games		4	13
All-Sector Average		7 ¹¹	N/A ¹²

¹⁰ 0% indicates that the number has been rounded down or that no respondents reported employment in this category at the time of the Survey.

¹¹ Indicative percentage only – due to methodology and weighting. Caution is advised when comparing against other percentages or when reviewing trends over time.

¹² Figure not available due to sample sizes and weighting.