



Image: David Eustace
The Cry – Synchronicity Films & BBC

Scotland's Screen Skills Research – Summary

June 2019

This paper provides an overview of the findings from recent research into skills in Scotland's screen sector¹, which was commissioned by Skills Development Scotland (SDS), in partnership with Creative Scotland and Screen Scotland.

The research considers the scale and nature of demand for skills in the industry, looking at what skills are required (now and in the future), and how the skills system responds to this demand. Led by the evidence gathered in the research, a series of recommendations have been developed to guide future skills development in the industry. This will form the basis of a skills strategy for the industry which will be developed this year and taken forward by Screen Scotland.

Prior to this research, there was a lack of comprehensive evidence relating to skills in Scotland's screen sector. While there have been UK-wide pieces, some offering a Scottish perspective, coverage was often limited. And whilst some issues will be common across the UK, arguably Scotland's screen sector operates under a different set of circumstances than its counterparts south of the border. For example, the more volatile pattern of production activity in Scotland (compared to London or the South East) may mean that it's more difficult for Scotland to retain the same depth within its freelance base and some skills shortages may be more acute than elsewhere.

It became clear that there was a need to understand more about the current Scottish screen workforce. Not only to inform thinking about specific challenges and how they may impact on future growth ambitions, but also to establish what needs to be done to overcome them.

¹For the purpose of this work, the definition of the screen sector is in line with guidance from the Screen Unit Collaborative Proposal and includes: production of filmed and television content; television broadcasting; animation; film and television distribution; film exhibition; post-production, including visual effects (VFX); and facilities (e.g. camera hire, props, lighting etc).

Research was commissioned to fill this gap by engaging with industry to provide critical insight and commentary about skills gaps and shortages which could constrain future growth in the sector.

The research was developed through a programme of extensive engagement with industry including employers, freelance workers and other key stakeholders. Largely carried out throughout 2018, it sought industry views through a combination of detailed online surveys and in-depth structured interviews.

The employer survey captured responses from 46 employers; together accounting for permanent employment of 1,182 and freelance employment of 1,474². The return covered 51% of Scotland's permanently employed workforce. A further 374 individuals responded to the freelance survey, and estimates suggest that this represents at least 11% of the total freelance workforce.

The overall approach culminated in a series of informative research pieces, bringing together feedback from employers, stakeholders and freelance workers, as well as data analysis relating to the provision of education, training and work-based learning within the sector. From this, an overarching summary document was produced which draws out the key findings.

²The inclusion of freelance data in both the employer survey and freelance survey carries some risk of double counting. Therefore, the two datasets were analysed separately.

Scotland's screen sector has enjoyed strong growth in recent years. There is good reason to assume this pattern of growth will continue.

Growth in screen production in Scotland has been driven by rapidly expanding demand for content particularly from streaming video on demand platforms like Netflix and Amazon Prime and from US studios and networks. The UK's tax relief scheme for film and high-end TV production has also played an important part in this growth, creating incentives for international feature film and high-end television production and attracting inward investment.

In 2017, total location spend on film and TV production in Scotland reached £96.5m in 2017, a record high and an increase of 39% on 2016. And there are good reasons to assume that this growth in production activity will continue, driving demand for skills. The outlook is positive for the sector, with a number of key developments on the horizon, including the recent launch of the new BBC channel in Scotland; Channel 4 creating a new creative hub in Glasgow and the development of a new studio in Scotland. In addition, there is a growing commitment from broadcasters to out-of-London production, which again creates opportunities for Scotland.

Continued growth in the sector will create new workforce opportunities, driving demand for skills for the existing workforce as well as new entrants. How and where Scotland's screen workforce secures skills is central to the discussion about the future prosperity of the industry.

A number of factors may affect future demand for skills in the sector. The recent period of growth for example, whilst positive and welcome, may put pressure on the workforce as production companies look to source more crew members, often from the freelance base. In addition, achieving Screen Scotland's ambitious growth target of doubling production spend over the next five years, will require a skilled and adaptive workforce.

Employers reported difficulties recruiting staff, more so in the freelance crew than in the employed workforce. Few employers expected recruitment to get easier with many employers expecting that the industry will continue to grow and outpace the growth of the talent/labour pool contributing to further shortages of labour and skills.

Recruitment difficulties were more likely to be reported in relation to the freelance crew than the permanently employed workforce. Employers offered reasons for these recruitment difficulties including: freelance crew leaving Scotland for work elsewhere; candidates lacking sufficient experience; and difficulties in attracting a diverse range of candidates.

Employers were asked about particular challenges in recruiting specialist roles. In both TV and film production, these mainly related to specialist roles in creative development, production and post-production. Facilities companies were more likely to report issues in production grades, while exhibition employers focussed more on programming, marketing, management and other roles.

Table 1 – Difficult to recruit specialist roles

	TV	FILM	EXHIBITION	FACILITIES
CREATIVE DEVELOPMENT	Senior roles Head of Development Development Staff Producers Directors Writers Script editors	Producers who can write and develop good projects	Programming	Mid – senior staff Storyboard Artists and Designers (VFX, Animation)
PRODUCTION	Production Managers Production Coordinators Executive Producers Series Producers Production Managers Producers Directors Editing Gaelic Speaking Editors	Production crew – all departments and Production Managers, Production Designers Editors		Production Managers Production Coordinators Emerging areas such as VR and AR Drone pilots
POST PRODUCTION	Editors Offline Editors Edit Producers Edit Assistants High End Camera DOPs			Nuke Compositor Houdini 3D Lighting Artists Online Editor
BUSINESS AND MANAGEMENT	Production Management Overseas Sales		Marketing Fundraising	Studio Managers Head of Production Business Development Management
OTHER	Grips Playback Ops	Grips		

Skills gaps were also reported by employers, the most common areas being marketing and promoting, business and entrepreneurship, project management, internationalisation/export promotion and technical skills for production and broadcasting (in TV only). Editing was commonly noted as a specific skills gap.

Most employers offer some kind of training, but this varies across different market segments. The proportion offering training is highest in Exhibition (100%), then Television (90%) and Facilities (72%). 50% of employers in the Film segment reported providing no training at all.

Mentoring, work shadowing and placements were all popular with employers, with a strong tendency towards in-house and informal provision. People under the age of 35 were more likely to favour apprenticeships. Few employers reported using colleges or universities to deliver training.

In terms of the freelance base, 41% reported that they had not done any training in the past three years. For those who have, the most commonly used are informal or non-accredited, or training in the workplace. When asked about the best ways to deliver screen training there was demand for informal, on-the-job training, specialist courses and structured mentoring.

68% of freelance respondents indicated that it wasn't easy to access training and cited the following reasons: courses too expensive; courses not available in Scotland; and lack of time to attend training. Upskilling the freelance crew can be challenging as the training needs to be targeted at the individual rather than the employer.

Camera training and post-production editing were areas which freelance crew felt they would most benefit from. However, producers, camera operators and editing/post-production were highlighted as specific gaps in the current training landscape. The freelance crew also identified a lack of opportunities for young people as well as a lack of opportunities for career progression.

Employers called for more integrated/cohesive training, working more closely with colleges and universities to ensure curriculum meets demand, and more work placements as part of student degree syllabus requirements.

In terms of future demand, employers identified a range of priority areas to ensure that the industry is well placed to take advantage of growth opportunities.

Although it's difficult to accurately estimate³ scale of future demand, the research used a number of assumptions to provide an estimate of future demand for both freelance and permanently employed staff:

- **Freelance** – Demand for between 496 and 761 **new** freelance crew members, with a further 139-395 **replacement** opportunities.

- **Permanently employed workforce** – Demand of between 271 and 415 new permanent employees, with a further demand for 225 **replacement** permanent employees.

In terms of the skills required in the future, employers across the different market segments are likely to have different needs. Film and high-end TV often require large crews with experience of working on productions of scale, whereas factual entertainment producers' needs are more likely to be focussed on production management, editing and development. For those in facilities and post production, there is demand for digital skills across the piece. This is set out in Table 2.

³It should be noted that these are broad estimates and have been calculated on the basis of a series of assumptions. As such, they should be treated with great caution and are presented here to provide an indication of the likely scale of the challenge ahead for Scotland's screen sector.

Table 2 – Skills Demand: Production Workforce Priority Areas

SEGMENT	PRIORITY AREAS	COMMENT
UNSCRIPTED TV	Development Executives Executive Producers Series Producers Directors Editors Production Managers Production Coordinators	The focus here is on the development of commercially appealing programme ideas (especially in returning series) and winning the commissions. There is less requirement for large crews and the key production hires tend to be directors, producers and editors.
FEATURE FILM & HIGH-END TV	Production Accountants Production Managers Production Coordinators Line Producers Location Managers Location Scouts First and Second ADs Camera Grips Art Directors Plasterers Scenic Painters	In addition to the specific roles identified here, most commented on a need across all departments and all grades. The roles shown here are urgent areas of need, but if the industry is to sustain growth in production activity it will require greater scale and depth across the whole production crew base which will mean adding to all areas. Thus, current shortages need to be filled while the overall scale of the skills base needs to increase.
ANIMATION/ VFX AND POST PRODUCTION	Augmented Reality/Virtual Reality 2D/3D Modelling in Animation Project Managers	Scotland lacks capacity in these areas, and has a limited company base in animation and VFX and only a small number of facilities companies.

Employers offered suggestions about how to overcome shortages and gaps in the existing workforce

The research overwhelmingly evidenced industry's prioritization in every production area of experience over qualifications. It should be noted though that the workforce itself is very highly educated. There was an appetite for better connections into FE and HE and schools to bring new talent into the industry and for more workforce development opportunities. There is also a need for a greater awareness of the breadth of roles and opportunities available within the sector across primary, secondary and tertiary education providers.

The education system has a key role to play in supplying talent to the industry but must match the pace of rapid change in the industry. Industry views on appropriateness of provision were mixed and there was recognition that employers needed to do more with education providers.

Employer feedback is mixed about how well educational provision meets industry needs. There were some concerns over the volume of media courses as well as how well they prepared students for a career in screen. There were also some concerns over how well-informed graduates were about the breadth of roles and opportunities on offer in the sector.

Industry expressed a clear preference for courses which had high levels of interaction with industry, a strong practical focus and commercial production-based training. They also place a strong value on new entrants with strong meta skills such as positive attitude, enthusiasm and willingness to learn and in some cases, more so than academic qualifications.

The industry also recognised that they need to do more both in terms of articulating its needs and working with education providers to help inform curriculum design and development and even provide opportunities such as placements for students.

There are well known, and persistent challenges relating to diversity and inclusion within the sector, highlighting the importance of a coordinated response to this issue. This is a commercial, as well as a socially inclusive imperative for Scotland's screen sector.

Analysis of the employer survey, which looked at the characteristics of those who work within these businesses, shows that women are better represented in the permanently employed workforce (54%) than in the freelance crew (42%).

The research reveals that women in the workforce face challenges around entry into the sector, in-work progression, and inequality of pay. As well as being less well-represented in the freelance base than the permanently employed workforce, they are also under-represented in camera, sound, lighting, and editing roles. Working conditions in the sector, longer working hours, for example can also create challenges for those with family/caring responsibilities.

However, the evidence does suggest that women in the permanently employed workforce are fairly well represented in some senior roles in the industry, particularly those in corporate management and production. Looking at the permanent workforce, 88% of those in Production Management were female, 57% in producing and 55% in Directing. Female freelancers, however, are less likely to be in a Directing role (42%).

Females are well represented in the University student base in screen related subjects, at 65%. At a College level, females account for 42% of enrolments. However, the strong female representation in the University student base is not replicated in the freelance workforce, suggesting that there may be barriers to entry.

People from ethnic minority backgrounds are under-represented in the workforce, particularly so in the freelance base. Within FE and HE, the student base in screen-related subjects is largely white, indicative of the need to attract people from a more diverse background into screen-related subjects. People with disabilities are well represented in screen related subjects at both FE and HE level but again under-represented in the workforce, which is again indicative of barriers to entry.

The use of unpaid internships continues to be widespread across the sector, reported by more than 60% of TV and exhibition companies, and 50% of Film employers. This practice is likely to favour those who can afford to undertake unpaid work, thus limiting diversity and social mobility.

Combined, these factors call for action on all fronts from the skills supply system through entry level training, apprenticeships and workforce development. Industry practice will need to adapt, alongside greater flexibility in public sector delivery models, if such issues are to be addressed.

Pressure on the freelance base can impact the sector's reputation for quality

There is significant reliance on freelance labour in the sector, particularly in film production. Yet the evidence suggests that some employers believe the freelance base is too small. There is also competition for this talent from outside of Scotland, meaning that when the Scottish sector is busy with production activity, employers often respond by bringing people in from outside the country. This is most often seen in a perceived reliance on known and established personnel from outside Scotland in senior producing grades. Respondents also commented that moving people up the ranks too quickly to fill gaps is increasingly common. This can impact on the quality and delivery of the production and affect the competitiveness of Scotland's screen industry.

The research resulted in the development of a set of four broad recommendations for skills development in Scotland's screen industry.

• **Providing Strategic Leadership and Coordination** – skills development in Scotland's screen industry needs clear strategy and leadership, and Screen Scotland is well placed to take this role, coordinating partners and industry around a shared agenda. However, industry representation and engagement is key and a group of industry representatives will be formed to:

• **Increase entry to the industry** – This is about ensuring that Scotland's education and training system, including tertiary education and work-based learning, is fit for purpose, delivering what industry needs. It is also about entry level training that acts as a bridge for education into the industry as well as addressing issues around recruitment practices such as unpaid internships.

• **Promote diversity within the sector** – Under representation of women, ethnic minorities and those with disabilities, along with pay gaps and barriers to both entry and progression continues to be one of the biggest challenges it faces. The use of apprenticeships can support greater equality and diversity.

• **Upskilling and reskilling the workforce** – This is about making it easier for employers and crew to access suitable training provision to update skills and support career progression. This is often affected by limited scale of provision and accessibility. Establishing clear means of signposting quality provision to business and freelancers is necessary, alongside achieving greater clarity and transparency in screen skills funding arrangements for all.

Table 3 sets out these four broad strategic areas, with some supporting actions and suggested lead partners.

The Screen Scotland Skills Working Group is responding to the research evidence and the report recommendations, and will be developing a new screen skills strategy with the industry for Autumn 2019.

Table 3 Summary of Main Recommendations

STRATEGIC AREAS	SUGGESTED ACTIONS	RESPONSIBLE AGENCY/PARTNERS
STRATEGIC LEADERSHIP AND COORDINATION	Establish a Skills Strategy for the Screen Sector aligned to infrastructure, production funding and business development plans	Screen Scotland/Partners/Industry
	Establish a Screen Skills Leadership Group	Screen Scotland/Partners/Industry
	Establish a Screen Skills Fund for Scotland	Screen Scotland/British Film Institute/Screen Skills/National Lottery/SDS & Scottish Funding Council (SFC)
	Work with industry to support skills development and work-based learning in all funding agreements	Screen Scotland & Industry
INCREASING ENTRY TO THE INDUSTRY	Improve understanding of real range of jobs and progression pathways across the screen sector	SDS, Screen Scotland, Screen Skills, Into Film & Industry
	Work with FE and HE providers to align courses and signpost as meeting industry demand	Screen Scotland/SFC/Creative Media Network
	Consolidate and prioritise Entry Level Training & Apprenticeships to meet industry demand	Screen Scotland/SDS/SFC & training providers
DIVERSITY	Review delivery models for Apprenticeships in Screen	SDS/Screen Scotland & Industry
	Work with industry to agree and implement measures to improve workforce diversity, recognising the need for different approaches for different groups.	Screen Scotland/Industry and industry representative bodies
UPSKILLING THE WORKFORCE	Develop a screen training route map	Screen Scotland/SDS/ & SFC
	Expand Freelancer training bursaries Work with industry to develop priority demand training	Screen Scotland Screen Scotland & Industry



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