West of England Local Skills Improvement Plan (LSIP)

Priority Findings – Creative Industries

1. Introduction

Creative Industries nationally account for around 2.37 million jobs, including 663,000 self-employed roles; around 7% of all UK jobs.[1] This is a significant increase of around 470,000 new roles since 2015, when total employment in this sector was around 5.8%. Creative Industries has been one of the fastest growing sectors in the UK for the past decade and the sector's ability to combine creativity and technology is a significant strength in terms of current provision and future growth potential. Bristol is one of only 2 cities outside London which feature in the top 10 for both creative and high-tech clusters[2]. The creative economy (Creative Industries plus creative jobs in other sectors) employed 3.2 million in 2018 (DCMS, Department for Culture, Media and Sport 2019).[3] 72% of the creative workforce are highly qualified, i.e., hold a degree/ higher level qualification (Level 4 or higher) or equivalent compared with 45% for the whole economy in 2019 (DCMS 2021).[4]

The Creative Industries sector adds a significantly higher than average Gross Value Add (GVA) to the country, with a national GVA in 2021 of £109 billion[5]. Before the effects of the COVID-19 pandemic, the sector had contributed £115.9 billion in GVA to the UK[6] according to a report from Creative UK (2021). The same report revealed that Creative Industries was one of the highest income generating sectors for the country.

---

[1] From *The Creative Industries,* article based on DCMS statistics, May 2022 https://www.thecreativeindustries.co.uk/facts-figures/uk-has-almost-2-3m-creative-industries-jobs-official-data

[2] From *West of England Local Industrial Strategy*, by Rt Hon Greg Clark MP, Professor Steve West and Tim Bowles, 2019 (https://www.gov.uk/government/publications/west-of-england-local-industrial-strategy/west-of-england-local-industrial-strategy). In the public domain.

[3] From *DCMS_Sectors_Economic_Estimates_Employment_Creative_Digital_economy_V2* https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fassets.publishing.service.gov.uk%2Fgovernment%2Fuploads%2Fsystem%2Fuploads%2Fattachment_data%2Ffile%2F951874%2FTables_53-54-DCMS_Sectors_Economic_Estimates_Employment_Creative_Digital_economy_V2.xlsx&wdOrigin=BROWSELINK

[4] From *Creative Industries Policy & Evidence Centre* article June 2022 https://pec.ac.uk/news/national-statistics-on-the-creative-industries

[5] From *DCMS Sectors Economic Estimates: Monthly GVA,* by Department for Digital, Culture, Media & Sport, 2022 (Using annual estimates from summed monthly GVA data - GOV.UK (www.gov.uk)). In the public domain.

[6] From *The UK Creative Industries: Unleashing the power and potential of creativity,* by Creative UK Group, 2021 (https://www.wearecreative.uk/champion/publications/). In the public domain.

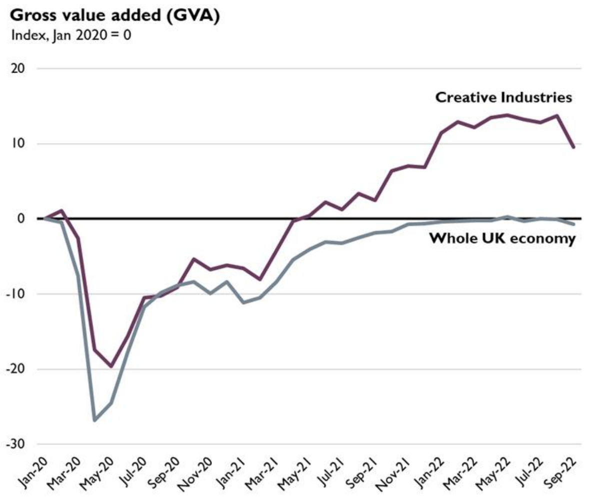


Image sourced: https://lordslibrary.parliament.uk/arts-and-creative-industries-the-case-for-a-strategy/

In the same Creative UK report, Oxford Economics forecasted that the sector could recover faster than the UK economy by 2025 with a projected growth of over 26% and contributing £132.1 billion in GVA to the economy. The predictions drew parallel to the fact that the sector was growing at a rate of four times the UK average for economic growth prior to the pandemic. The report also highlighted that Creative Industries has the potential in this timeframe to create 300,000 new jobs, which would be "enough new jobs to employ the working-age population of Hartlepool and Middlesbrough twice over".

Before the pandemic the sector employed 2.1 million people across the country and it was projected at that time that there would be one million additional jobs within Creative Industries by 2030 - Deloitte analysis from 2022 also suggests that the wider creative economy in the UK could grow by as much as 40% by 2030, potentially equivalent to almost 2 million more jobs created[7].

According to the "Skills, talent and diversity in the Creative Industries" Evidence Review in 2019 by PEC, between 2011 and 2018 there were 1,086,000 creative occupations within Creative Industries, a further 954,00 non-creative occupations and a total of 3.2m jobs in the creative economy.[8] This meant that in this time period, there were an additional 480,000 jobs in Creative Industries, a 30% increase in employment and a growth of three times the UK employment average with the majority of positions held in IT, software and computer services, music performing and visual arts, publishing and advertising and marketing.

However, despite these positive signs that the sector is projected to grow, it has been recognised that there is a lack of data on skills shortages and where growth is projected and needed both in the sector nationwide and regionally. An excerpt from the House of Lords Communications and Digital Committee published on 17 January 2023 states "*skills shortages present a major challenge to the Creative Industries. But detailed data on these shortages are limited and fragmented. This makes it difficult to forecast future requirements and develop evidence-based policy interventions that target priority areas*"[9].

---

[7] From *The Future of the Creative Economy,* by Deloitte, 2021 (https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/technology-media-telecommunications/deloitte-uk-future-creative-economy-report-final.pdf). In the public domain.

[8] From *Skills, Talent and Diversity in the Creative Industries Evidence Review 2019/01,* by the Creative Industries Policy and Evidence Centre, 2019 *(*PEC-Evidence-synthesis-scoping_Work-Foundation-FINAL.pdf (lancaster.ac.uk)). In the public domain.

[9] Excerpt from *House of Lords Communications and Digital Committee 2nd Report of Session 2022–23 At risk: our creative future,* by The House of Lords, 2023 (https://publications.parliament.uk/pa/ld5803/ldselect/ldcomm/125/125.pdf) in the public domain.

For the purposes of the West of England Local Skills Improvement Plan (LSIP), 'Creative Industries' included:

- Advertising and marketing;
- crafts;
- creative software outputs (such as gaming and animation, crafts and design);
- film, television, video, radio and photography;
- publishing;
- music, performing and visual arts;
- as well as those working within the sector in non-creative roles and those in creative roles outside of the sector itself.[10]

These sub-sectors were chosen for the West of England LSIP due to the region's specialism in the media industry (including film TV, radio, photography and music) with the West of England having a 26% higher employment rate in these subsectors than nationally (0.6%)[11]. In addition, the creative and wider cultural sector in the West of England has seen higher local employment rates than national averages, such as publishing (50% higher in the West of England); IT and software (47% higher); and architecture, crafts, and design (28% higher).

The West of England is home to a network of colleges, four universities, and training centres, programmes and initiatives such as 'Creative Workforce for the Future'. The region is home to four Further Education colleges (Bath College, City of Bristol College, South Gloucestershire and Stroud College and Weston College) which were responsible for almost 100,000 students.[12]

Post-16 Technical education provision for Creative Industries in the region is provided via all of the regional FE colleges, Independent Training Providers such as Access Creative College and boomsatsuma, and there are higher level apprenticeships and Higher Technical Qualifications via Higher Education Institutions. The West of England Institute of Technology also provides creative and digital courses, and there is significant creative sector bootcamp provision. According to Bristol Creative Industries 'Creative Force' report, nearly four in 10 (38%) would not consider taking on an apprentice, highlighting an ongoing disconnect in understanding in the region for many creative sector employers about apprenticeships and their benefits[13]. Creative, arts and entertainment apprenticeship starts during 2020/21 fell almost 50%, to their lowest level in a decade, whilst those in motion picture, video and television production and sound and music activities rose slightly but remained significantly under their peak[14].

The skills need risk is ensuring the region trains and attracts new entrants to the workforce alongside ensuring wide uptake of new technologies and consumer demand. The opportunity is to ensure the creative sector can continue to flourish in the West of England, taking advantage of technological advancements and increasing the cluster's global significance. We have delineated these opportunities into three types of skills priorities:

---

[10] From *DCMS Sectoral Economic Estimates*, 2022 https://www.gov.uk/government/collections/dcms-sectors-economic-estimates

[11] From *West of England cultural sector economic summary,* by West of England Combined Authority, 2022 (https://www.westofengland-ca.gov.uk/wp-content/uploads/2022/02/West-of-England-Cultural-Sector-Economic-Summary-February-2022.pdfp). In the public domain.

[12] From *West of England Strategic Economic Plan 2015-2030,* by West of England Local Enterprise Partnership, 2021 (west-of-england-sep.pdf (lepnetwork.net)). In the public domain.

[13] From *A creative force to be reckoned With: Unleashing the power of Bristol's Creative Industries*, by Bristol's Creative Industries, 2021 (*https://bristolcreativeindustries.com/app/uploads/2022/09/creative-force-report.pdf).* In the public domain.

[14] From *Creative apprenticeships drop to lowest level in a decade,* by Neil Puffett, 2022 (Creative apprenticeships drop to lowest level in a decade | News | ArtsProfessional). In the public domain.

- *Skills Shortage Occupations reflecting the current supply and demand,*
- *Skills for new technology (upskilling of existing occupations and new occupations), and*
- *Granular skills requirements reported by employers*

Please note we have not at this stage delineated needs within sub-sectors of Creative Industries except where explicitly indicated in employers' reported skills needs but expect to further engage within Phase 2 project delivery as identified prioritised actions for deep-dive, refinement and further exploration.

There are a number of governance structures, initiatives and networks currently or imminently in place within the region that are relevant to the future LSIP processes, and will be important to complement rather than cut across. These include (but are by no means limited to) the Employment and Skills Plan[15] - into which the LSIP will feed additional granular intelligence - and the Careers Hub[16] which connects young people, colleges/Post-16 and employers by the West of England Combined Authority. Current skills provision projects for employers within the sector include Workforce for the Future[17] and Bristol WORKS[18]. We also recommend reading the West of England Combined Authority Report from June 2022, 'Horizon Scanning: Post-16 Education and Skills Infrastructure' as this outlines occupational changes in skills needs for the Creative and Digital sector amongst others.[19]

2. Labour market intelligence trends for the West of England region

Nationwide trends are broadly replicated for the West of England region, where the sector directly currently employs around 26,000 people.[20]

In the West of England LEP region, there are more than 6000 SMEs within the sector with over 190 production companies and an estimated GVA contribution in 2017 of £5.1 billion from creative and cultural industries.[21] In 2022, the West of England Combined Authority reported in that the cultural, digital and Creative Industries employed 50,000 in the region, across almost 7,000 businesses[22]. Creative UK noted in their 2021 report that for every £1 the Creative Industries contributed directly to the local economy, the sector in the South West generated an extra £1 towards the economy[23]. The West of England was identified as a "globally significant, high-growth creative cluster" in the Creative Industries Sector Deal[24].

---

15 From *West of England Combined Authority Employment and Skills Plan,* 2019 https://www.westofengland-ca.gov.uk/wp-content/uploads/2019/09/West-of-England-Employment-and-Skills-Plan-July-FINAL.pdf
16 https://www.westofengland-ca.gov.uk/what-we-do/employment-skills/careers-hub/
17 https://www.westofengland-ca.gov.uk/growth-hub/workforce-development/workforce-future/
18 https://www.bristol.works/employers
19 From *West of England Combined Authority Post 16 Skills and Infrastructure Report,* 2022 https://www.westofengland-ca.gov.uk/wp-content/uploads/2022/08/Horizon-Scanning-Post-16-Education-and-Skills-Infrastructure.pdf
20 From *Census 2021 Creative Industries in the West of England,* by the Office for National Statistics, 2022 (Creative industries in the West of England - Office for National Statistics (ons.gov.uk)). In the public domain.
21 From *Creative and Media,* by Invest Bristol & Bath, 2023 (https://www.bristolandbath.co.uk/key-sectors/creative-media). In the public domain.
22 From *West of England cultural sector economic summary,* by West of England Combined Authority, 2022 (https://www.westofengland-ca.gov.uk/wp-content/uploads/2022/02/West-of-England-Cultural-Sector-Economic-Summary-February-2022.pdfp). In the public domain.
23 From *A creative force to be reckoned With: Unleashing the power of Bristol's Creative Industries*, by Bristol's Creative Industries, 2021 (*https://bristolcreativeindustries.com/app/uploads/2022/09/creative-force-report.pdf).* In the public domain.
24 From *West of England Local Industrial Strategy*, by Rt Hon Greg Clark MP, Professor Steve West and Tim Bowles, 2019 (https://www.gov.uk/government/publications/west-of-england-local-industrial-strategy/west-of-england-local-industrial-strategy). In the public domain.

Priority strengths in the West of England creative cluster include film and tv production including animation, and technology as driver for new sub-sectors of creative outputs. The vast majority of creative firms in Bristol are microbusinesses although there are also some nationally and internationally significant large businesses, according to Bristol Creative Industries 2021 report. Self-employment is represented in the sector at twice the average (32% in comparison to 16%) and around 300,000, or over one in eight UK businesses (11.8%) in 2019 were analysed to be part of the Creative Industries nationally.[25] Employment in Creative Industries is predicted to grow at a rate higher than the rest of the UK's economy, potentially over 6% a year (see above analyses) – the Combined Authority's Horizon Scanning Infrastructure Survey also highlights replacement and expansion demand projections[26] if this national trend is replicated in the region, this will create over 1,500 new roles per year. Bristol Creative Industries 'Creative Force' report suggests around one third of businesses in the region struggle to access employees with appropriate skillsets.

According to data from the 2021 ONS Census (capturing data from residents aged 16 years and over in employment the week before the census in England and Wales), on 21st March 2021, across Bath and North East Somerset, Bristol, North Somerset and South Gloucestershire, there were:

- **4,165** employees working in Motion Picture, video and television production, sound recording and music publishing activities;
- **1,210** employees working in Programming and broadcasting activities;
- **6,265** employees working in Creative, arts and entertainment activities; and
- **1,468** employees working in Libraries, archives, museums and other cultural activities.[27]

The West of England LSIP has identified that across Creative Industries, core business and management skills are skills frequently difficult to find when recruiting. This research aligns with Nesta's Creative Industries Policy and Evidence Centre's (PEC) skills and talent review of 2019 (incorporating existing research from Work Foundation Screen Skills 2019; Creative and Cultural Skills 2018, the Arts Council England and others), which reported the same finding and suggested that factors including shifts in "funding and financing, flatter structures, the individualism that characterises work in parts of the industry, and the fact that many businesses are led by technical experts has led to a lack of leadership and management skills in the sector".[28] The West of England Combined Authority has set a target of 40,000 additional jobs to be created in the region by 2036 according to the West of England Cultural Plan[29]. Launched in February 2022, the plan has objectives structured around four focus areas: cultural and creative skills, creative freelancers, start-ups and small to medium-sized enterprises, placemaking, wellbeing, environmental sustainability, digital technology, and innovation inclusion.[30]

Colloquially, we are hearing that hybrid and remote working has been both a blessing and a curse for the sector, with some employers reporting that liquidity in the region has been reduced due to the ability to work for other employers, with London highlighted as a main draw for those who can work fully remotely, but other locations in Europe and globally are now able to draw from the potential

[25] From *National Statistics on the Creative Industries,* by Creative Industries Policy & Evidence Centre, 2022 (Creative Industries Policy & Evidence Centre | National Statistics on... (pec.ac.uk)). In the public domain.

[26] https://www.westofengland-ca.gov.uk/wp-content/uploads/2022/08/Horizon-Scanning-Post-16-Education-and-Skills-Infrastructure.pdf Page 27

[27] From *Census 2021*, by Office for National Statistics, 2022 (https://www.ons.gov.uk/datasets/TS060/editions/2021/versions/2?showAll=industry_current_88a#industry_current_88a). In the public domain.

[28] From *Skills, Talent and Diversity in the Creative Industries Evidence Review 2019/01,* by the Creative Industries Policy and Evidence Centre, 2019 *(*PEC-Evidence-synthesis-scoping_Work-Foundation-FINAL.pdf (lancaster.ac.uk)). In the public domain.

[29] From *West of England Cultural Plan,* by West of England Combined Authority, 2022 (https://www.westofengland-ca.gov.uk/wp-content/uploads/2022/02/West-of-England-Cultural-Plan.pdf). In the public domain.

[30] https://www.local.gov.uk/case-studies/west-england-cultural-compact

labour market in the West of England, particularly within software development and coding clusters. Simultaneously this means that creative industry employers are able to draw from a wider potential labour market. We have not been able to statistically validate this trend but expect further evidence to be made available during the course of this project. The UKHLS COVID-19 study data shows that in January 2021 arts, recreation and education industries had around 74% of their workforce working at home[31] and most respondents to the Bristol Creative Industries (BCI) Creative Force report locally (63%) have experienced an increase in the number of staff remote working.

West of England Employment by Sector, Creative Industries[32]:

- **Advertising and market research** (within Professional, Scientific and Technical Activities) 5905 employees, 0.94% of total employees.
- **Publishing activities** (within Information and Communication) 3860 employees, 0.61% of total employees.
- **Motion picture, video and television programme production, sound recording and music publishing services** (within Information and Communication) 3660, 0.58% of total employees.
- **Programming and broadcasting services** (within Information and Communication) 1115 employees, 0.18% total employees.
- **Sports activities and amusement and recreation activities** (within Arts, Entertainment and Recreation) 7160 employees, 1.14% of total employees.
- **Libraries, archives, museums and other cultural activities** (within Arts, Entertainment and Recreation) 1760 employees, 0.28% of total employees.
- **Creative, arts and entertainment activities** (within Arts, Entertainment and Recreation) 1705 employees, 0.27% of total employees.
- **Gambling and betting activities** (within Arts, Entertainment and Recreation) 825 employees, 0.13% of total employees.

3. Job postings and forecasts to meet replacement and expansion need (existing staff leaving the sector's workforce either into different sectors or retirements and new employment generation against expected sectoral growth)

In 2019, Oxford Economics estimated that Creative Industries could create 300,000 new jobs nationally by 2025 – flat profiled across relative sizes of labour market, this would mean an increase in the West of England of around 6,300 new employees in this sector, although due to the concentration and recent expansions the region is likely to grow faster than this national average[33]. Creative Industries are forecast by the Creative Industries Federation (CIF) to grow nationally at a rate nearly three times that of the UK average, potentially increasing total UK employment from 6.4% in 2019 to 6.8% by 2025.[34]

Some roles within Creative Industries nationally are in short supply, with the Migration Advisory Committee (MAC) recommending in 2019 the additional inclusion of a wide range of roles in the sector

[31] From *The impact of remote and hybrid working on workers and organisations,* by the Parliamentary Office of Science and Technology, 2022 (POST-PB-0049.pdf (parliament.uk)). In the public domain.
[32] From *West of England Labour Market Summary*, by West of England Combined Authority, 2023 (Microsoft Power BI). In the public domain.
[33] From *Creative Industries can create 300,000 new jobs and generate an extra £28bn for the economy by 2025*, by Dr Richard Wilson OBE, 2021 (FE News | Creative Industries can create 300,000 new jobs and generate an extra £28bn for the economy by 2025). In the public domain.
[34] From *Developing Economic Insight into the Creative Industries,* by Oxford Economics, 2021 (Developing economic insight into the creative industries (creativeindustriesfederation.com)). In the public domain.

to the Shortage Occupation List for international recruitment, including programmers, web design and development roles and artistic roles.[35]

Nesta's 'Geography of Creativity' report suggested that in the West of England (Bristol and Bath as conurbations for analysis), the sub-sector of 'software and digital' was the largest minority, providing almost 45% combined of total number of employment organisations, with film, tv and radio and music and performing arts making up the next most significant sub-sectors and advertising, design and publishing making up the majority of the remainder.[36] Lightcast Analysis - (provided Dec 2022 via West of England Combined Authority) suggests that over 16,000 employers recruit within creative sector roles in the West of England, with significantly higher jobs postings in motion picture, video and television production.[37] There are significant known shortages nationally in Screen Sector production, craft and technical grades - in particular visual effects (VFX), games and animation, with accountants, line producers, first assistant directors, series producers, storyboard artists, animators and general coders also ranking among the most commonly reported shortages.[38] Experienced programmers are in short supply in this sector, similar to other sectors exposed to digital transformation, but with additional focus on AI coding and graphics engines.

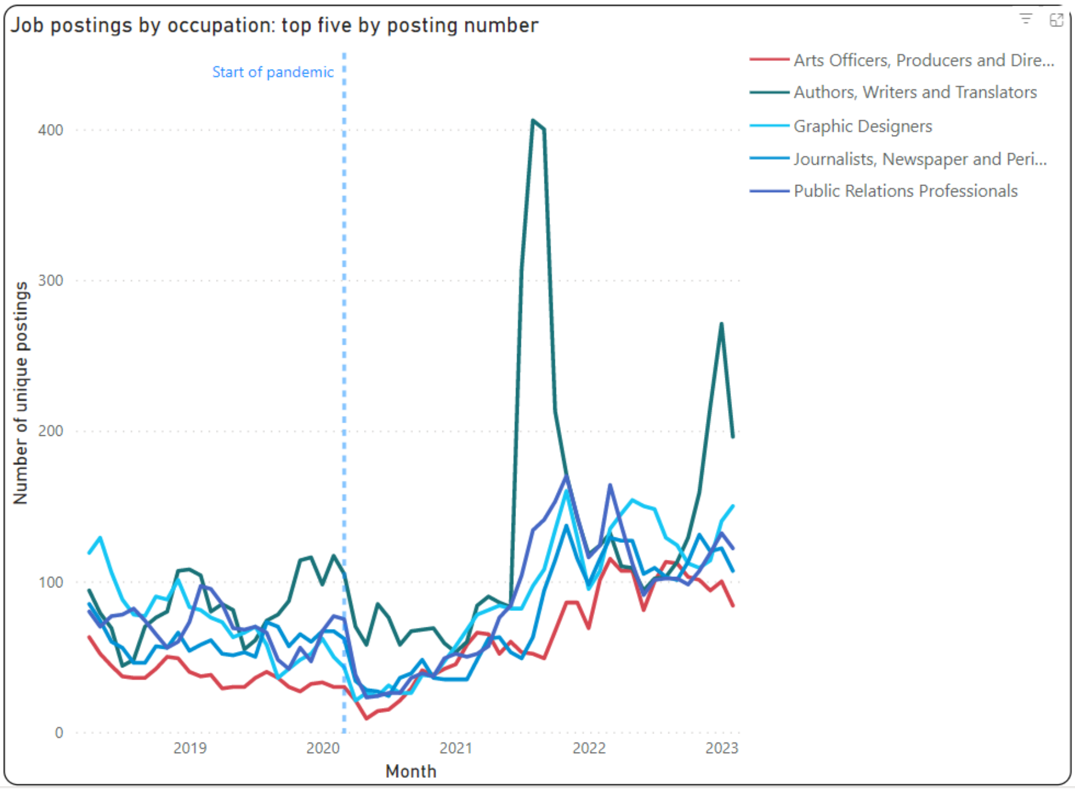
Below we have incorporated graphs from the Department for Digital, Culture, Media and Sport (DCMS). The figures for sector employment estimates nationally are broadly in line with known regional employment and indicative of current jobs posts for the region, both highlighting primary employment needs within production, marketing and writing-role vacancies, followed by design roles. As delineated above, significant numbers of these roles are creative but within non-sector employment, and roles attached to software development and coding needs are unlikely to be represented appropriately within sectoral analyses. We have also incorporated a graphic taken from the combined authorities Labour Market dashboard, highlighting some of the current job postings.

[35] From *Skilled Worker visa: shortage occupations,* by UK Visas and Immigration, 2022 (Skilled Worker visa: shortage occupations - GOV.UK (www.gov.uk)). In the public domain; From *Skills, Talent and Diversity in the Creative Industries Evidence Review 2019/01,* by the Creative Industries Policy and Evidence Centre, 2019 *(*PEC-Evidence-synthesis-scoping_Work-Foundation-FINAL.pdf (lancaster.ac.uk)). In the public domain.

[36] From *The Geography of Creativity in the UK,* by Nesta, 2016 (the_geography_of_creativity_in_the_uk.pdf (nesta.org.uk). In the public domain.

[37] From *Occupation Snapshot Report: LSIP – Creative,* by Lightcast, 2022 (LSIP - Creative - Occupation Snapshot.pdf - All Documents (sharepoint.com)). In public domain.

[38] From *Creative Industry Skills Overview,* by Screen South, 2019 (Slide 1 (ncfe.org.uk)). In public domain.



Graphics provided by the *West of England Labour Market Summary Dashboard*[39]

DCMS National Employment analysis within creative occupations, 2022[40]

Occupation (1000s) in the UK	Within Creative Total	Outside Creative Total	Total
Marketing and sales directors	45	190	235
Advertising and public relations directors	21	19	40
Information technology and telecommunications directors	54	51	105
IT business analysts, architects and systems designers	48	86	135
Programmers and software development professionals	174	177	351
Web design and development professionals	37	26	62
Architects	36	17	53
Town planning officers	10	12	22
Librarians	7	18	25
Journalists, newspaper and periodical editors	63	16	79
Public relations professionals	17	42	59
Advertising accounts managers and creative directors	24	19	43
Architectural and town planning technicians	18	11	30
Artists	57	13	70
Authors, writers and translators	71	25	96
Actors, entertainers and presenters	31	38	69
Dancers and choreographers	13	6	18
Musicians	48	21	68

[39] From *West of England Labour Market Summary*, by West of England Combined Authority, 2023 (Microsoft Power BI). In the public domain.
[40] From *DCMS Sector Economic Estimates Employment April 2021-March 2022*, by DCMS, 2022 (DCMS_Sector_Economic_Estimates_Employment_April_2021_to_March_2022.ods (live.com)). In the public domain.

Arts officers, producers and directors	66	25	91
Photographers, audio-visual and broadcasting equipment operators	65	18	83
Graphic designers	71	30	101
Product, clothing and related designers	45	44	90
Marketing associate professionals	39	166	205
Totals	**1,086**	**1,162**	**2,248**

4. Occupational Priorities (shortages within occupations)

We have attempted below to show some of the existing roles' needs and forecast requirements to indicate where sectoral needs may be met via existing courses, with or without micro-interventions. Below this we align some forecasting via analysis of the above sources of employment and vacancy rates with potential training needs. We have not as yet looked at these shortages in relation to current supply volumes from colleges and ITPs, therefore these priorities are here for discussion with providers at this stage.

We have attempted to RAG rate needs (Red, Amber, Green, with Red being most pressing needs) in terms of absolute numbers and percentage workforce requirements to highlight to most pressing existing role shortages within this sector.

Role	**Need forecast**	**R**	**A**	**G**	**Priority/possible action and funding source. Growth in:**
Programmers, software developers	Estimates of UK jobs postings for 2022 in these roles vary between 20,000–60,000. Flat profiled at 30,000 to West of England workforce would require an additional 585 roles, of which +-300 likely to be affiliated with Creative Industries	x			Software Developer Apprenticeships at L3, 4 and 6 FT 16 to 19 FE/T-Levels
Marketing, managers and professional roles	Currently there are 611 Marketing Manager vacancies in South West England, this figure has increased by 10.2% year-on-year[41]	x			Content Creator Level 3. digital Marketer L3 Apprenticeship New marketing T-Level when available
Authors, Writers and Translators	Approx. 170 current live roles in region		X		Apprenticeships Full time 16 to 19
Graphic Designers	Currently there are 209 Graphic Designer vacancies in South West England, this figure has increased by 4.6% year-on-year[42]		X		Digital Content Creator - Level 3 standard Apprenticeship

[41] From *South West England Marketing manager salary stats, by* Adzuna, 2023 (https://www.adzuna.co.uk/jobs/salaries/south-west-england/marketing-manager). In the public domain.

[42] From *South West England Graphic designer salary stats,* by Adzuna, 2023 (https://www.adzuna.co.uk/jobs/salaries/south-west-england/graphic-designer). In the public domain.

					L3 T-Level in Craft and Design
Arts officers, Producers and Directors	Currently there are 25 Film Production vacancies in South West England, this figure has increased by 13.3% year-on-year in South West England whereas this figure nationally is -12.5%.[43] NB impacts still being felt on subsector from economic factors, likely to increase in future.			X	L3 T-Level in Media, Broadcast and Production
Public Relations Professionals	Currently there are 14 PR Executive vacancies in South West England.[44]			X	Needs primarily met via higher education routes, also via PR And Comms Assistant L4

With a combined current employee count of 5,375[45], it is clear that the occupations within Motion Picture, video and television production, sound recording and music publishing, and Programming and broadcasting activities are in the highest demand in the region. Arts officers, Producers and Directors, Authors, Writers and Translators, Graphic Designers and Public Relations Professionals will all be required roles by 2024 to meet demand in the West of England.

5. Occupational Opportunities – Skills for new technologies

We can identify some of the more imminent technological needs within this sector. There is current demand for all of these technologies but it is limited in volume. However, it is expected that there will come a point relatively soon, where many of these technologies will grow rapidly in volume. When depends very much on Government policy. We have therefore broken down technological and expected sectoral needs into broad areas or specific to a technology, [alongside some forecasting of expected demand (extrapolated to a regional level where possible or pre-existing)]

The 'Creative Digital Skills Revolution' report produced by Nesta created a model to illustrate relationships between the probability of a job growing in the future (as estimated in the Future of Skills (2017)) and the proportion of 'createch' skills in job adverts for that job.[46] This tracked the importance of 'createch' skills and occupational outlook and the average proportion of 'createch' skills mentioned, highlighting strong correlations of job adverts which list a requirement for 'createch' skills with an increase in this job role's probability of future growth.

Aligning this rationale with the West of England cluster's strengths and employment rates, as well as the global growth of creative interactive digital production (including web, interactive television,

43 From South West England Film production salary stats, by Adzuna, 2023 (https://www.adzuna.co.uk/jobs/salaries/south-west-england/film-production). In the public domain.

44 From South West England Pr executive salary stats, by Adzuna, 2023 (https://www.adzuna.co.uk/jobs/salaries/south-west-england/pr-executive). In the public domain.

45 From *Census 2021*, by Office for National Statistics, 2022 (https://www.ons.gov.uk/datasets/TS060/editions/2021/versions/2?showAll=industry_current_88a#industry_current_88a). In the public domain.

46 From *The Creative Digital Skills Revolution,* by Nesta, 2019 (The Creative Digital Skills Revolution (assets-servd.host)). In the public domain.

gaming and interactive advertising), we would suggest that significant technological change and growth are likely to occur within audio-visual production, advertising and marketing and within creative artistry (both visual and audio). Additional quotations from analyses of growth sectors have been incorporated below as indicative of some change in the sector as a whole:

> *"Creative jobs are also expected to prove more resilient to the effects of new technology such as robotics and machine learning, with 87% of highly creative workers at low or no risk of automation (Osborne, Frey and Bakhshi 2015).*[47]
>
> *"1 There were over 2,000 UK firms working on immersive technologies in 2021, a rise of 83 per cent over five years.32 PwC has estimated that virtual reality technologies will add £62.5 billion to the UK economy by 2030; much of the design input will come from the creative sector." […]"the Creative Industries Policy and Evidence Centre (PEC), told us the most common shortages reported to the PEC were in digital, design and craft skills. The BFI Skills Review 2022 estimated that film and high-end television will require between 15,130 and 20,700 additional full time employees by 2025. This did not include visual effects, animation or unscripted production."*
>
> *(Excerpts from House of Lords Communications and Digital Committee 2nd Report of Session 2022–23 At risk: our creative future*
>
> *'Virtual and augmented reality could deliver a £1.4 trillion boost to the global economy by 2030' (Immerse UK, 2022 Immersive Economy Report, October 2022),*

We have identified in the table below, the main occupations we believe are likely to be affected by these changes and needs. In the next section of the report we provide a more granular identification of employers stated needs.

Please note that the Combined Authority are simultaneously holding discussions with FE providers attached to green skills' needs and meeting the challenges and opportunities decarbonisation present for the future, and will ensure that our ongoing process and delivery aligns these as fully as possible.

Right now our priority is that Colleges and other providers of training for these occupations, gear up their practical facilities and as far as possible and begin (if not already), to offer the upskilling and awareness needed alongside new occupational programmes where there is local demand or expected imminent local demand. We hope to have discussions with providers and stakeholders about how demand could be stimulated further and timing of growth.

Occupations	**Senior and Managerial**	**Operatives, Technicians, Film and TV production crew**	**Creative Roles, content creators etc**
Technology			
Immersive technologies, AR/VR/Virtual Production	Awareness and understanding	Upskilling for use	Upskilling for use
Development, writing, editing – interactive media	Awareness and understanding		Upskilling for use
Connectivity, 5G, IoT,	Awareness	Upskilling for use	
Analytics and data	Awareness	Upskilling for use	

---

[47] From *Skills, Talent and Diversity in the Creative Industries Evidence Review 2019/01,* by the Creative Industries Policy and Evidence Centre, 2019 *(*PEC-Evidence-synthesis-scoping_Work-Foundation-FINAL.pdf (lancaster.ac.uk)). In the public domain.

Lidar, Drones, AI and ML – production, writing, operational applications	Awareness and understanding	Upskilling for use	
3d modelling (both for virtual production and interactive digital media)	Awareness and understanding	Upskilling for use	Upskilling for use

6. Businesses Reported Skills Needs - Granular Business Intelligence via LSIP

Please note that the LSIP research will continue until April 2023 in the first phase, with additional needs, refinements, deep dives and any identified new foci to continue longer term until May 2025. These below skills needs findings are based on the initial 3 months of LSIP research and delivery and hopefully indicate (in a no way comprehensive manner) expected 'direction of travel' in the final report. As any additional needs are identified and verified we will share prior to report release with stakeholders in the most appropriate identified means.

The LSIP has worked to gather current in-depth business intelligence on perceived unmet needs, understanding of current delivery and potential economic and technological changes. The intention of the LSIP research methodology is to add current and granular intelligence to existing understanding and not to replace prior research into skills needs, particularly those datasets which could be considered statistically robust.

We have divided these findings into approximated areas of need, and -alongside the sections above on occupational shortages and industrial trends – expect these to form a reasonably comprehensive picture intended to address current and expected unmet needs within the sector, both in terms of interventions in existing provision (micro or modular) and identification of potential new provision (although this falls primarily towards in-work and modular needs due to the methodology utilised in the LSIP primary research phase). The areas these are outlined under are:

- Critical Workplace, Core and Transferable skills
- Core Digital Skills
- Sector Specific, Technological Change and Digitalisation Skills Needs
- Decarbonisation, Sustainability and Alignment to the UK's Net Zero Strategy Skills Needs
- *Systemic/Labour Market/Other reported needs*

We have indicated where we believe businesses have reported these needs most significantly in terms of where they fit within career and occupational progression (from new entrants through to experienced) and believe these are areas of funding and provision that align more or less closely:

Experienced Current Employees (upskilling, modular, CPD)	**Experienced/ Occupationally Competent New Employees (upskilling, skills gaps, new work functions)**	**Career movers from another sector (part experienced and/or direct/linked training eg Boot Camps**	**Those in both work and formal training e.g. apprentices**	**Younger/New Entrants/non-experienced 16-19 and adults**
For Example: In-house, innovation/AEB/LSIF	For Example: In-house/bespoke/Innovation/AEB/ LSIF	For Example: AEB, Bootcamps, Other DfE e.g. certificates of future technology, In-house, LSIF	For Example: Apprenticeship	For Example: T-Levels, other 16 to 19 vocational, Vocational HE and preparatory

We do not intend to be prescriptive in suggestions where FE Providers (and others) may see an ability to respond to LSIP skills needs findings, more to indicate where we see opportunities for action that align with occupational progression, life stages and current (particularly mainstream) funding mechanisms. These therefore represent the options we want to discuss with providers, alongside and within ongoing conversations and planning with the Combined Authority regarding provision and in particular implications of the Employment and Skills Plan.

Employers have expressed a strong view that young recruits are often not work ready in terms of essential skills and work related basic digital skills. It is therefore a priority for us to explore the possible implementation of "Skillbuilder" essential skills system (or similar) into pre-16 and academic post-16 education across the area. We are aware of the support provided (and planned) via the West of England Careers Hub and other initiatives and will welcome the opportunity prior to report release to ensure synergies and collaborative work rather than replication. We would also aim to build these skills into post-16 vocational programmes and Apprenticeships (where they are not already there) so that employers themselves will also continue to develop these skills in the workplace.

There is wide recognition within the sector that a number of key and reasonably mature technologies are likely to be incorporated into this sector much more comprehensively, although there is some reticence to adopt too widely until demand signals turn into actual demand, particularly against balancing current demand in traditional needs with lack of available workforce. These roles and technologies are consistently mentioned:

- AR/VR, Virtual Production and wider use of ‘green screen’ technologies
- Videography, animation and motion graphics
- Coding, software engineering
- AI both as a product and a tool
- Cloud development
- Various sub-sets of Computer Aided Design (CAD) including graphic design, graphic interfaces and UX

Critical Workplace, Core and Transferable Skills

Need Statement	**PROVISIONAL PRIORITY**	Experienced Current Employees (upskilling, modular, CPD)	Experienced/Occupationally Competent New Employees (upskilling, skills gaps, new work functions)	Career movers from another sector (part experienced and/or direct/linked training eg Boot Camps	Those in both work and formal training e.g. apprentices	Younger/New Entrants/non-experienced (16-19) and adults
Soft skills reported as needing development in new entrants: • Communication • Confidence • Organisation & Problem solving • Teamwork and leadership • administration	**1. Explore the implementation of Skillbuilder (or similar) in pre 16 and post-16 academic education** **2. Ensure essential skills and work entry skills are fully embedded in all post-16 vocational programmes for the creative sector (i.e. beyond T-Levels and Apprenticeship (where they already be in the behaviours)**			X	X	x

Skills needing development in all levels of employee: • Project and team management principles and practise, including agile methodologies • Creative collaboration, effective hybrid working	**3. Short course programme for existing employees (managers and potential managers) covering, project management, customer service, hybrid working, sales, finance, HR issues, business planning** **4. Make content of above available within post-16 to 19 creative programmes and Apprenticeships**	x	x	x	X	X
Customer service, sales and negotiation, pitching – process of lead/enquiry conversion	As 3 and 4 above		x	X	x	x
HR and Finance, particularly in SMEs	**As 3 and 4 above (relevant staff)**	x	x		x	X
Upskilling employers to identify and address barriers to employment for those further from the labour market and to improve diversity (additional HR support)	**As 3 above**					
Understanding distinctions and benefits in digital versus in-person communication	**See Digital skills below**				x	X
Senior and middle – business planning, strategy, succession planning and workforce development	5. Programme of support for WFD planning	X	x	X	X	X

Core Digital Skills

Need Statement	**PROVISIONAL PRIORITY**	Experienced Current Employees (upskilling, modular, CPD)	Experienced/ Occupationally Competent New Employees (upskilling, skills gaps, new work functions)	Career movers from another sector (part experienced and/or direct/linked training eg Boot Camps	Those in both work and formal training e.g. apprentices	Younger/New Entrants/non-experienced (16-19) and adults
General IT literacy: Outlook, diary and calendar management, appropriate email terminology and tone	**6. Digital literacy and basic skills short course programme,**	x	x	x	x	x

Sector wider movement away from email and alternatives (?)	**As 6 above**	x	x	X	x	x
Tech innovation and adoption literacy in senor/middle management	Build into manager programme 3 above	x	X	x		
Teams and Zoom etc as communication platforms	**As 6 above**	X	x	x	x	X
CRM and file storage principles	**7. Digital programme for IT support staff and relevant managers**	X	x	X		
Cloud and collaborative development including file sharing	**As 7 above**	x	x	X		
Data protection, security, sharing	As 7 above	x	x	x		
Website basics inc. maintenance	As 7 above	x	X	X		
SEO, Google Ads, Social Media and marketing	As 7 above	x	x	X		

Sector Specific and Technological Change

Need Statement	PROVISIONAL PRIORITY	Experienced Current Employees (upskilling, modular, CPD)	Experienced/ Occupationally Competent New Employees (upskilling, skills gaps, new work functions)	Career movers from another sector (part experienced and/or direct/linked training eg Boot Camps	Those in both work and formal training e.g. apprentices	Younger/New Entrants/non-experienced (16-19) and adults
Software engineering, coding (esp. python), html	**8. Explore the development of programmes combining full time courses with Apprenticeships for Software Dev Technician, Advanced Tech and Professional.(inc checks on content of standards re list below)** **9. Develop an upskilling programme for existing staff covering required content**	x	x	x	x	X
Design softwares such as Adobe suite, Canva, CAD (including Autodesk and fusion360), product design elements	**As 8 and 9 above**	X	x	x	x	x
Videography, motion graphics, animation and editing (including framing principles)	As 8 and 9 above	x	x	x	x	x
Technology developments: AR/VR/AI and virtual production methodologies (including wider 'green screen'ing)– usage and productivity	**As 8 and 9 above**	x	x	x	x	X
Principles of consulting, incorporating technology and shortening timescales	**As 8 and 9 above**	X	x	x	x	x
Data analytics, data services, data visualisation	**As 8 and 9 above**	x	x	x	x	X
Elements of testing, QA and test engineering (?)	**As 8 and 9 above**	X	x	x	x	x
Copy and professional writing (inc. grammar)	**Build into 2 above**			X	x	x
Cloud development, embedding innovation and service diversification	As 8 and 9 above	x	x	x	x	x

Development of in-house mentoring and shadowing best practise	Part of 8 and 9 above	x	X	x	x	x
Technological awareness: Drone, Lidar and 3D design	As 8 and 9 above	x	x	x	x	x

Net Zero Skills

Need Statement	**PROVISIONAL PRIORITY**	Experienced Current Employees (upskilling, modular, CPD)	Experienced/ Occupationally Competent New Employees (upskilling, skills gaps, new work functions)	Career movers from another sector (part experienced and/or direct/linked training eg Boot Camps	Those in both work and formal training e.g. apprentices	Younger/New Entrants/non-experienced (16-19) and adults
Energy reduction and efficiency, in-house and service provision	**10. Net zero awareness and basic skills programme for managers** **11. Build similar awareness content into mainstream post-16 programmes and Apprenticeships**	x	x	x	x	x
Sustainable production methodologies	**As 10 above**	X	x	x		
Recycling, wastes and materials – alternatives and efficiencies	As 10 above	x	x	x		
Environmentalism in consumer demand	**As 10 above**	x	x	x		
Data storage	**As 7 above**	X	x	x	x	x
Communicating change, branding and messaging	**As 3 above**	x	X	x		
Travel. Transport and logistics – emissions, efficiency, alternatives, funding & incentives	As 10 above	X	x	x		
Carbon calculation (Scopes 1-3) and offsetting	As 10 above	x	x	X		

Local Skills & Labour System Feedback

Please note that although these are not explicitly skills needs, these are other issues highlighted by employers and stakeholders that may require addressing alongside interventions in provision directly.

Need Statement	PROVISIONAL PRIORITY	Experienced Current Employees (upskilling, modular, CPD)	Experienced/ Occupationally Competent New Employees (upskilling, skills gaps, new work functions)	Career movers from another sector (part experienced and/or direct/linked training eg Boot Camps	Those in both work and formal training e.g. apprentices	Younger/New Entrants/non-experienced (16-19) and adults
Sector strong preference for online, modular and flexible provision for upskilling and CPD (short term contractual arrangements seen as hampering longer term course uptake)	**As in 3, 6, 7, 9, 10 above** **NB 8 above is also a major potential development given te high level of self employment within the sector. This may involve the creation of employment vehíceles for apprentices ie "ATA"**	x	x	x	X	X
Better CAEIG focussed on wider pathways and progression – better understanding of changed sector and roles	**Part C LSIP**					
Need for industry experience and liaison in teaching	11. Explore placement/exchange programme for FE staff					
Assistance in finding existing relevant support and resource for technical upskilling in-house	**As 11 above**					
Support to understand apprenticeship schemes, best practise and levy usage	**As 8 above**					
Identifying barriers to employment in some areas and increasing diversity, esp. in coding/software side of sector	**Part C LSIP**					
Sector reports difficulties in finding employees, with some concerns hybrid and remote working is benefitting the London creative cluster more	Part C LSIP					
Greater sectoral collaboration seen by many as key to address wider	Part C LSIP					

skills and employment systemic issues						