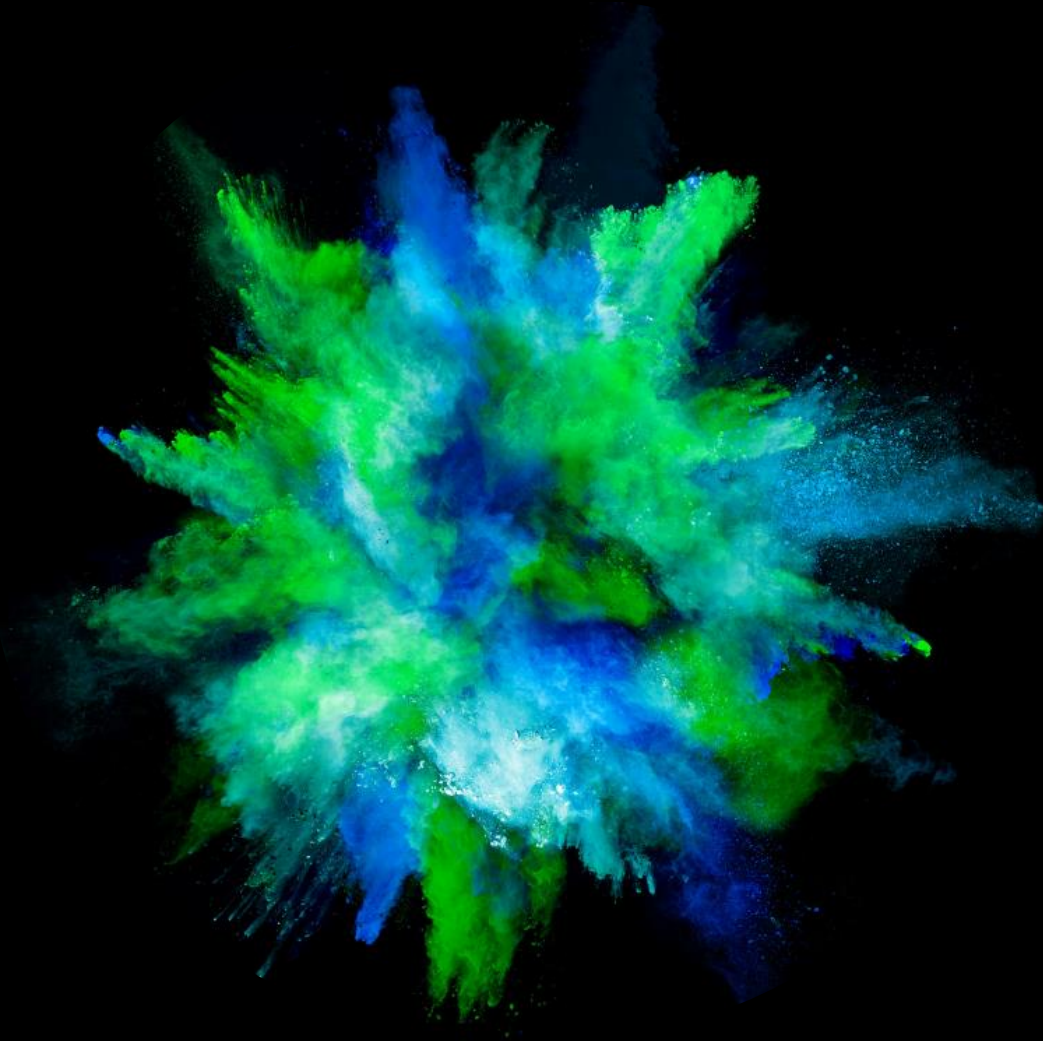# Deloitte.

Creative Industries Federation – Creative Careers Campaign

Results from the Members' Survey

April 2018

Purpose of this document

This survey aims to identify the talent pipeline challenges that the Federation's members face and to discern where efforts should be focused so that future activities achieve the greatest impact

Survey objectives

- Creative careers and skills sit at the heart of the Federation's priorities and we aim to work closely with members as our activities take shape – including the Creative Careers Campaign

- As such, this members' survey was launched to gain your perspectives on:

  - Industry-wide challenges regarding skills and talent pipelines

  - The effectiveness of existing research, materials and initiatives in the market

- With your input, the Federation has been able to validate the focus of its work in this space and to ensure that our activities will achieve the greatest possible impact

Survey participants

- The survey was sent out to all members, and was met with great enthusiasm

- ~110 respondents completed the survey within the two-week window

- Of these respondents:

  - ~20% were freelancers or non-employing sole traders; with the remaining ~80% representing employing organisations

  - ~57% represented a charity, not-for-profit or (for-profit) business

  - ~21% did not fall within an individual creative sub-sector, with many performing cross-sector roles
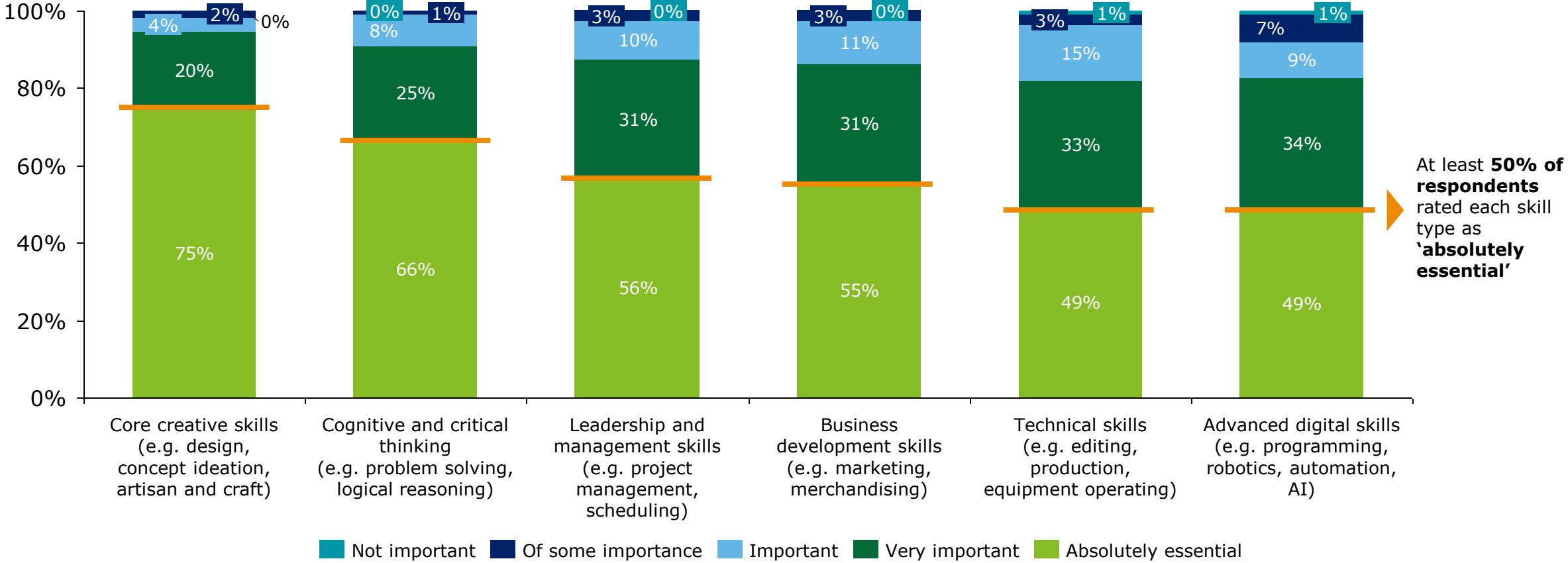
Scope of questions

- Through the survey, members were asked for their perspectives on a number of question areas, including:

  - The importance of various skills in building an effective creative workforce

  - The immediacy of skills and talent pipeline shortages

  - The drivers behind talent challenges

  - The potential outlook for creative skills and the employment landscape

  - The importance of creative skill and talent development activities

  - Drivers impacting the lack of diversity in the creative industries

Survey results

While development of core creative skills is the most critical focus, it is clear that the industry demands a workforce comprised of individuals with hybrid skills

Relative importance of skills types (n=110)

At least **50% of respondents** rated each skill type as **'absolutely essential'**

Legend: Not important | Of some importance | Important | Very important | Absolutely essential

Q. Using the scale below, please indicate how important you believe each type of skill will be to the overall effectiveness of the UK's future creative workforce in three to five years' time. Please select one answer for each statement.

Despite perceived challenges with immediate skills gaps, half of employing organisations did not have 'hard to fill' vacancies for roles requiring creative skillsets

Presence of 'hard to fill' creative vacancies (n=89)
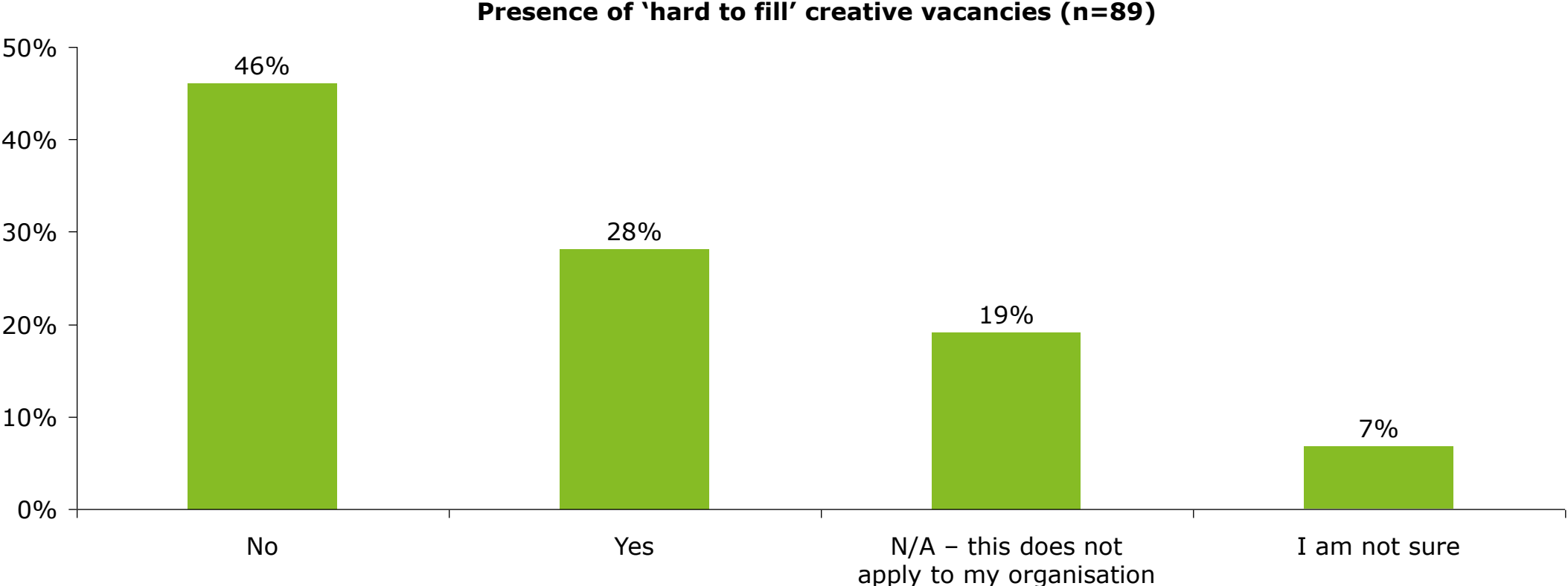
Q. Does your organisation currently have 'hard-to-fill' vacancies in roles that predominantly require creative skills? (excluding dedicated administration, business support or commercial management roles)

The majority of 'hard to fill' creative vacancies required either niche specialist technical skills or senior leaders with hybrid creative, leadership and commercial skills

Selection of representative responses:

"Some permanent technical / production roles have been trickier to fill, although this might be about timing."

50-99 employee, Charity/not-for-profit, Cultural centre

"Content distribution and audience development skills."

5-9 employee, Business, Film, TV, video, radio and photography

"Specialist senior/lead programming roles UX - programming and design Producer/production management - especially at senior level."

500-999 employee, Business, Video Games

"We always have difficulty filling senior creative architects/designer roles."

5-9 employee, Business, Architecture

"Roles with real artistic knowledge."

1000+ employee, Education & Skills provider, Music, performing and visual arts

"Digital expertise with limited digital resources/equipment."

10-19 employee, Charity/not-for-profit, Music, performing and visual arts
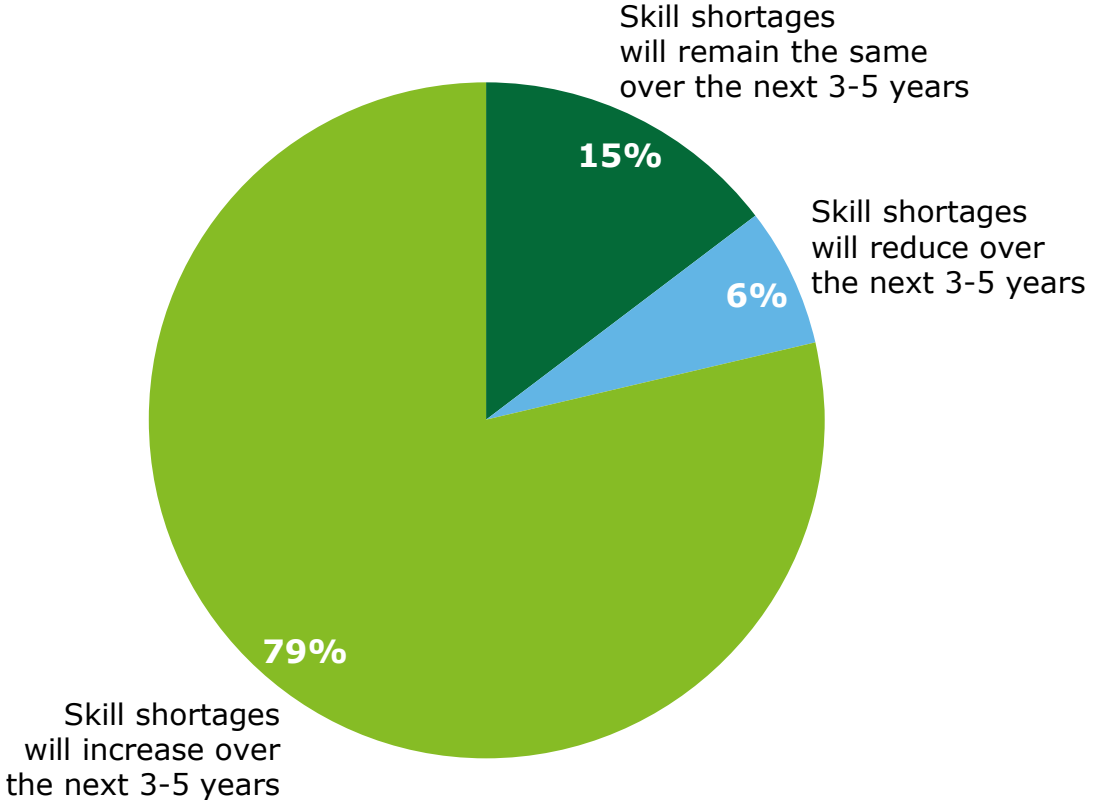
"As a small arts organisation, we require everyone to be a complete all-rounder - capable of creative programming, strategy, partnership-building, fundraising and marketing."

5-9 employee, Charity/not-for-profit, Music, performing and visual arts

Q. Please describe the nature of the role / roles that you have difficulty filling

c.80% of all respondents believe that skills shortages will increase over the next 3-5 years; which is consistent across employing and non-employing organisations

**Outlook for future creative skills
(All respondents; n=108)**

Skill shortages will remain the same over the next 3-5 years

15%

Skill shortages will reduce over the next 3-5 years

6%

79%

Skill shortages will increase over the next 3-5 years

(Employing respondents only; n=87)

15%

7%

78%
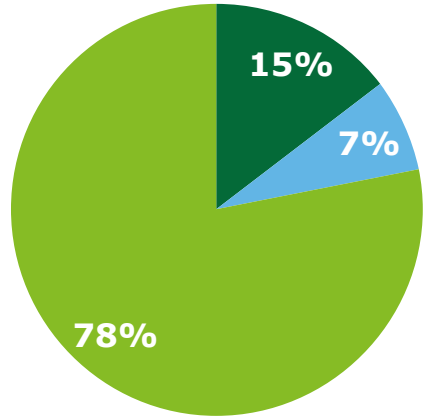
(Freelance/non-employing respondents only; n=21)
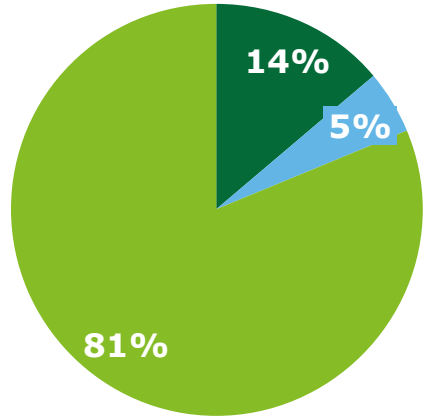
14%

5%

81%

■ Skill shortages will remain the same over the next 3-5 years

■ Skill shortages will reduce over the next 3-5 years

■ Skill shortages will increase over the next 3-5 years

Q. Given the current education and employment landscape, what do you believe the outlook for creative skills will be in the future?

A large number of respondents based their negative skills outlook on the increasing separation between education curriculum and the evolving needs of creative businesses

Selection of representative responses:

"Poor education within schools, discouraging more students to take creative pathways or progress onto HE."

1-4 employee, Charity/not-for-profit, Music, performing and visual arts

"There is a constant flow of creatives coming through HEI general Arts and Humanities courses for whom there are not currently enough jobs; too few specialist courses are feeding the industry."

10-19 employee, Charity/not-for-profit, multi-sector

"The creative industries, will rely more on small teams, the confidence and ability to take initiative and a good understanding of how your skill(s) you possess can be of value to others."

Creative Freelancer, Content Development

"Design and technology numbers have plummeted by 60% over last decade. We need more lateral creative thinking across our economy and design woven through STEM."

50-99 employee, Charity/not-for-profit, Design

"Fewer young people will be aware of the variety of possible careers in the Creative Industries, and will thus lack the vocabulary to seek suitable education and training for a career."

1-4 employee, Trade Body, Music, performing and visual arts

"With business being more digital we are not confined by geography, but if we don't have the skills in the UK we must use those available overseas."

20-49 employee, Business, Video Games

"Education and formal training is becoming prohibitively expensive."

20-49 employee, Business, Architecture

"Young people are not given the right independent information on qualifications and skills needed."

Creative Freelancer, Marketing & Advertising

Q. Please briefly give a reason for this outlook (i.e. your outlook for the worsening skills shortage in the future creative industries)

Over half of respondents considered the unstable nature of work, poor conditions and a low number of quality applicants to be causes of creative skills challenges

Causes of current skills shortage (n=110)

Cause	Percentage
Unstable nature of work (often not full-time/permanent work)	58%
Poor terms and conditions (e.g. pay) associated with creative roles	54%
Low number of high-quality applicants with the required skills	53%
Geographic location of where creative roles are based	43%
Lack of work experience the company demands	37%
Poor career progression	34%
Poor recruitment channels / mechanisms (inc. lack/cost of advertising)	33%
Difficulty with work permits / immigration issues for non-EU staff	30%
Other (please specify)	25%
Lack of infrastructure (available/affordable work spaces, good wifi etc.)	25%
Demanding or unsociable work hours	20%
Not enough people interested in doing this type of job	14%
Low number of applicants generally	10%
Lack of formal qualifications the company demands	5%
Don't know	5%

Q. Which of the following causes do you believe contribute to current skills shortages in predominantly creative roles? (please tick all that apply)

When grouped by theme, issues relating to the nature of creative work were most commonly considered as causes of the skills challenges, followed by key structural issues

Causes of current skills shortage, grouped by theme (n=110)

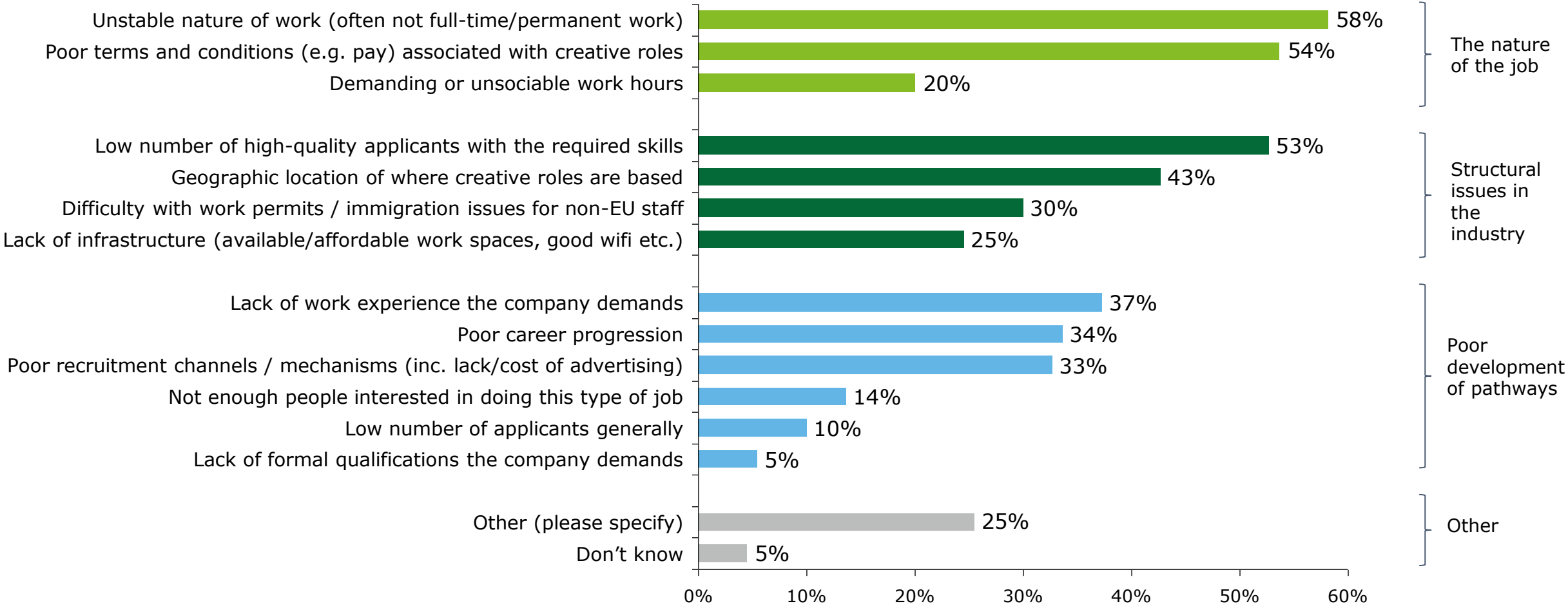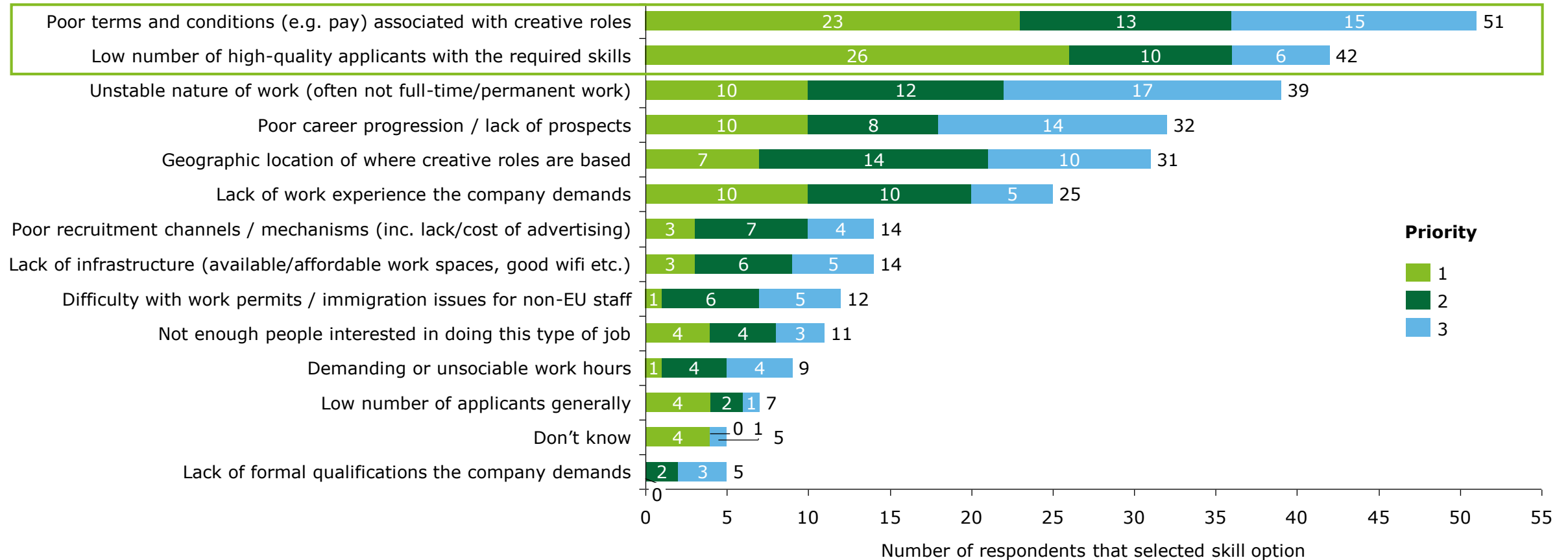| Category	Item	Value
The nature of the job	Unstable nature of work (often not full-time/permanent work)	58%
	Poor terms and conditions (e.g. pay) associated with creative roles	54%
	Demanding or unsociable work hours	20%
Structural issues in the industry	Low number of high-quality applicants with the required skills	53%
	Geographic location of where creative roles are based	43%
	Difficulty with work permits / immigration issues for non-EU staff	30%
	Lack of infrastructure (available/affordable work spaces, good wifi etc.)	25%
Poor development of pathways	Lack of work experience the company demands	37%
	Poor career progression	34%
	Poor recruitment channels / mechanisms (inc. lack/cost of advertising)	33%
	Not enough people interested in doing this type of job	14%
	Low number of applicants generally	10%
	Lack of formal qualifications the company demands	5%
Other	Other (please specify)	25%
	Don't know	5%

Q. Which of the following causes do you believe contribute to current skills shortages in predominantly creative roles? (please tick all that apply)

When assessing the primary causes of skills challenges, 'poor terms and conditions' and 'low number of skilled applicants' were clearly the most significant issues

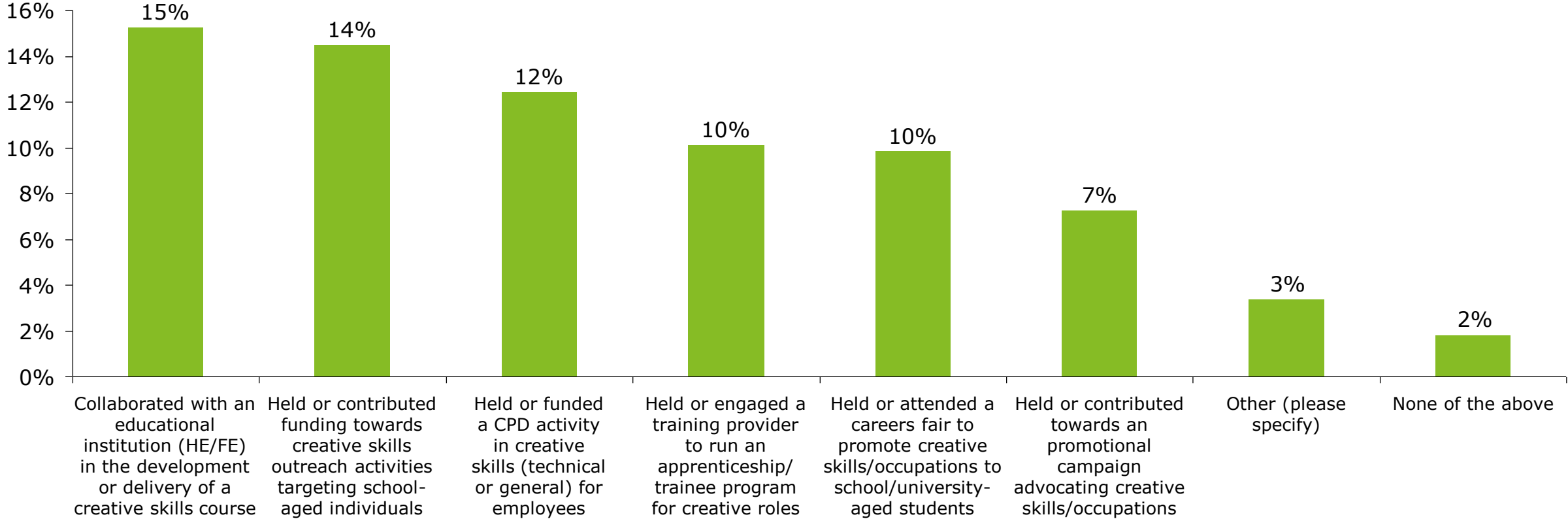**Relative ranking of causes of current skills shortage (n=107)**

	Priority 1	Priority 2	Priority 3	Total
Poor terms and conditions (e.g. pay) associated with creative roles	23	13	15	51
Low number of high-quality applicants with the required skills	26	10	6	42
Unstable nature of work (often not full-time/permanent work)	10	12	17	39
Poor career progression / lack of prospects	10	8	14	32
Geographic location of where creative roles are based	7	14	10	31
Lack of work experience the company demands	10	10	5	25
Poor recruitment channels / mechanisms (inc. lack/cost of advertising)	3	7	4	14
Lack of infrastructure (available/affordable work spaces, good wifi etc.)	3	6	5	14
Difficulty with work permits / immigration issues for non-EU staff	1	6	5	12
Not enough people interested in doing this type of job	4	4	3	11
Demanding or unsociable work hours	1	4	4	9
Low number of applicants generally	4	2	1	7
Don't know	4	0	1	5
Lack of formal qualifications the company demands		2	3	5

Number of respondents that selected skill option

Q. What do you believe are the top 3 causes of skills shortages in predominantly creative roles? (please select up to 3 and rank in order of importance: 1 = most important)

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There is a high level of self-reported engagement in skills development activities, focused on collaboration with FE and HE organisations and school outreach

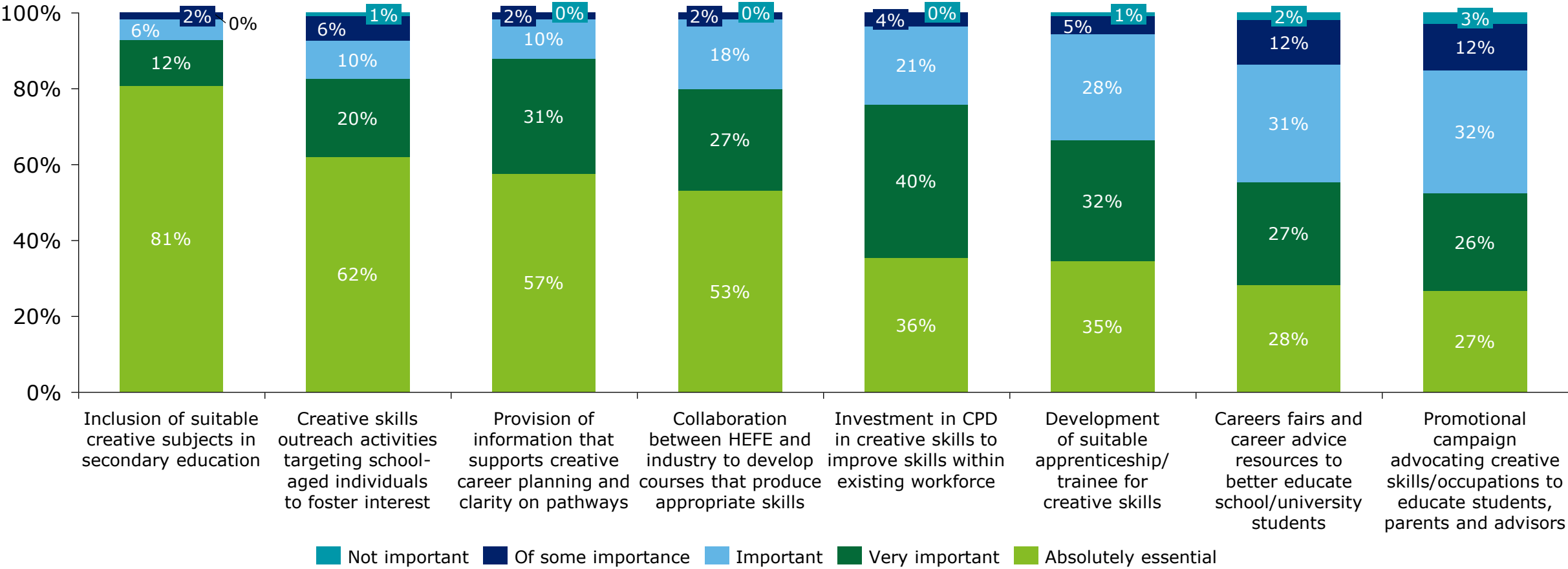**Engagement in creative skills development activities (n=89)**

Activity	%
Collaborated with an educational institution (HE/FE) in the development or delivery of a creative skills course	15%
Held or contributed funding towards creative skills outreach activities targeting school-aged individuals	14%
Held or funded a CPD activity in creative skills (technical or general) for employees	12%
Held or engaged a training provider to run an apprenticeship/ trainee program for creative roles	10%
Held or attended a careers fair to promote creative skills/occupations to school/university-aged students	10%
Held or contributed towards an promotional campaign advocating creative skills/occupations	7%
Other (please specify)	3%
None of the above	2%

Q. Which of the following creative skills development activities have you engaged in over the past 12 months? (please tick all that apply)

Interventions addressing secondary education and career planning information were rated as the most essential to developing the UK's future creative workforce
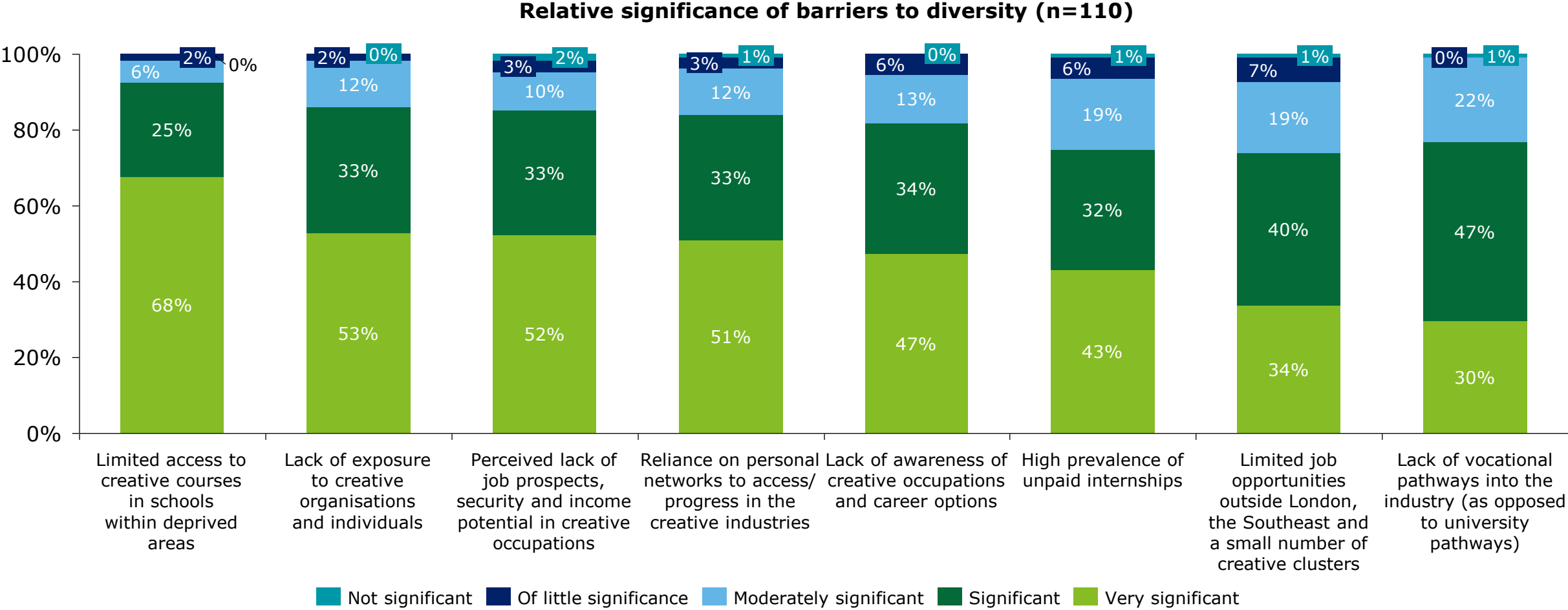
Relative importance of creative skill development activities (n=110)

Legend: Not important | Of some importance | Important | Very important | Absolutely essential

Q. How important do you believe the following creative skills development activities are in terms of developing the future creative workforce?

c.93% of all respondents considered the lack of access to creative courses in deprived areas to be a significant or very significant contributor to the lack of diversity

Relative significance of barriers to diversity (n=110)

Legend: Not significant | Of little significance | Moderately significant | Significant | Very significant

Barrier	Very significant	Significant	Moderately significant	Of little significance	Not significant
Limited access to creative courses in schools within deprived areas	68%	25%	6%	2%	0%
Lack of exposure to creative organisations and individuals	53%	33%	12%	2%	0%
Perceived lack of job prospects, security and income potential in creative occupations	52%	33%	10%	3%	2%
Reliance on personal networks to access/ progress in the creative industries	51%	33%	12%	3%	1%
Lack of awareness of creative occupations and career options	47%	34%	13%	6%	0%
High prevalence of unpaid internships	43%	32%	19%	6%	1%
Limited job opportunities outside London, the Southeast and a small number of creative clusters	34%	40%	19%	7%	1%
Lack of vocational pathways into the industry (as opposed to university pathways)	30%	47%	22%	0%	1%

Q. How significant do you believe the following issues are in contributing to a lack of diversity in the creative industries?

Appendix: Categorisation of survey respondents

c.80% of survey respondents represented an employing organisation, the majority of whom employed up to 50 employees

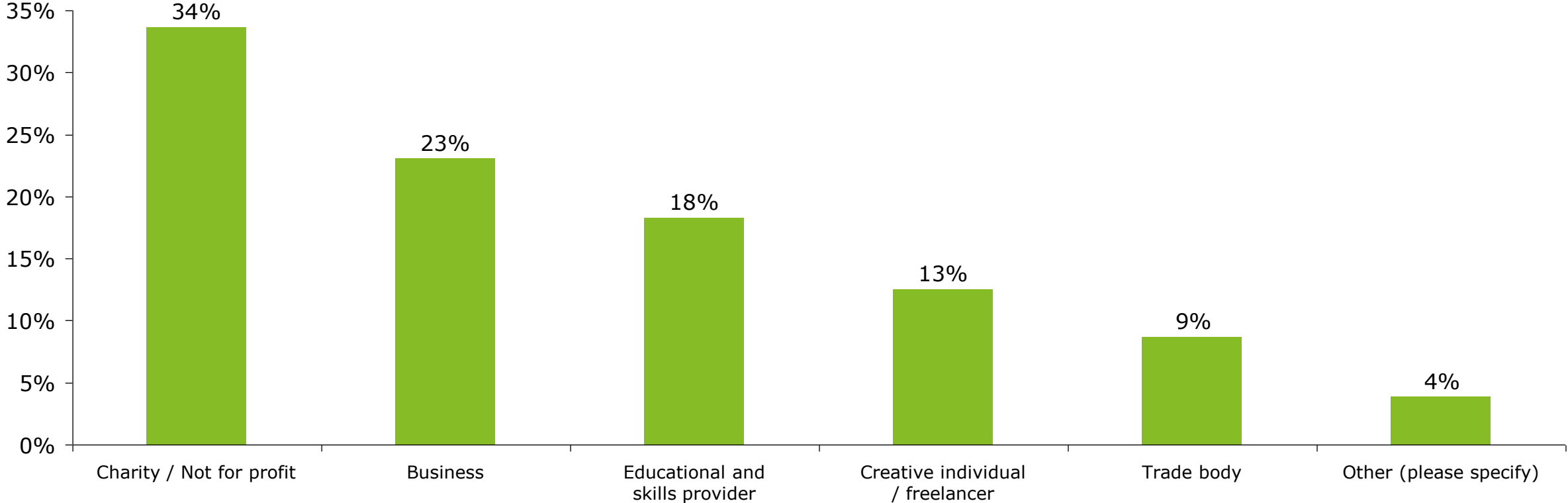**Size of respondent's organisation (n=110)**
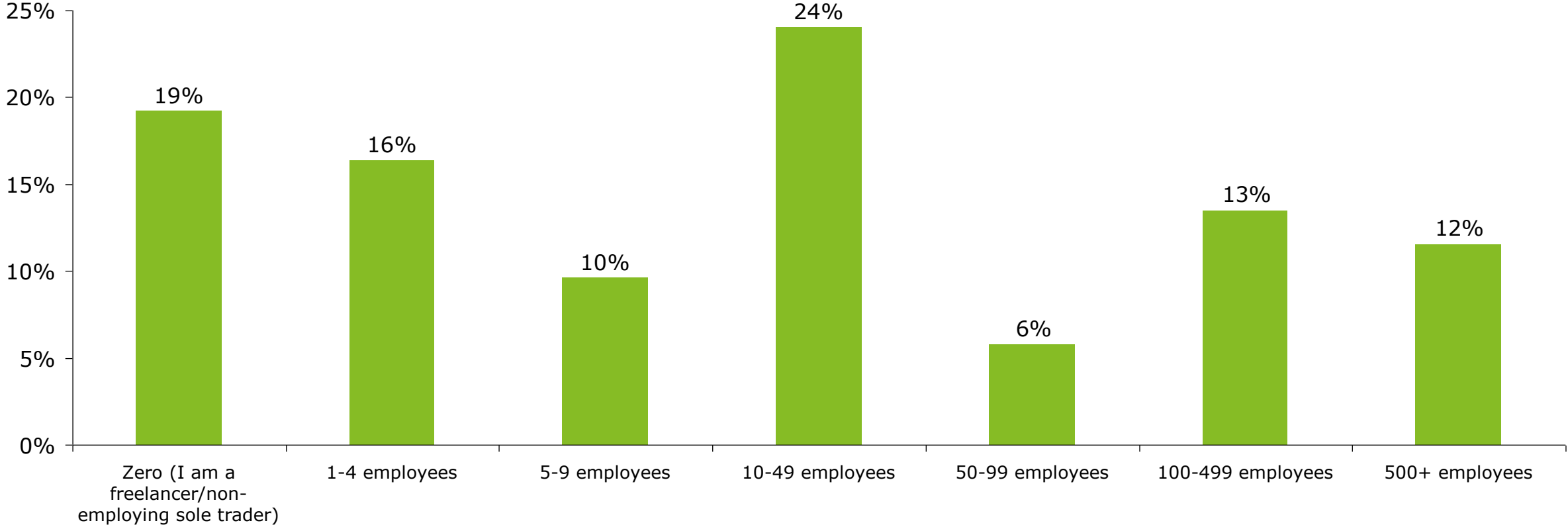
Q. How many employees does your organisation have (not including the business owner)?

Source: Creative Careers and Skills - Member Survey, April 2018
Base: All respondents, 2018: 110

Over half of survey respondents represented a charity, not-for-profit or (for-profit) business
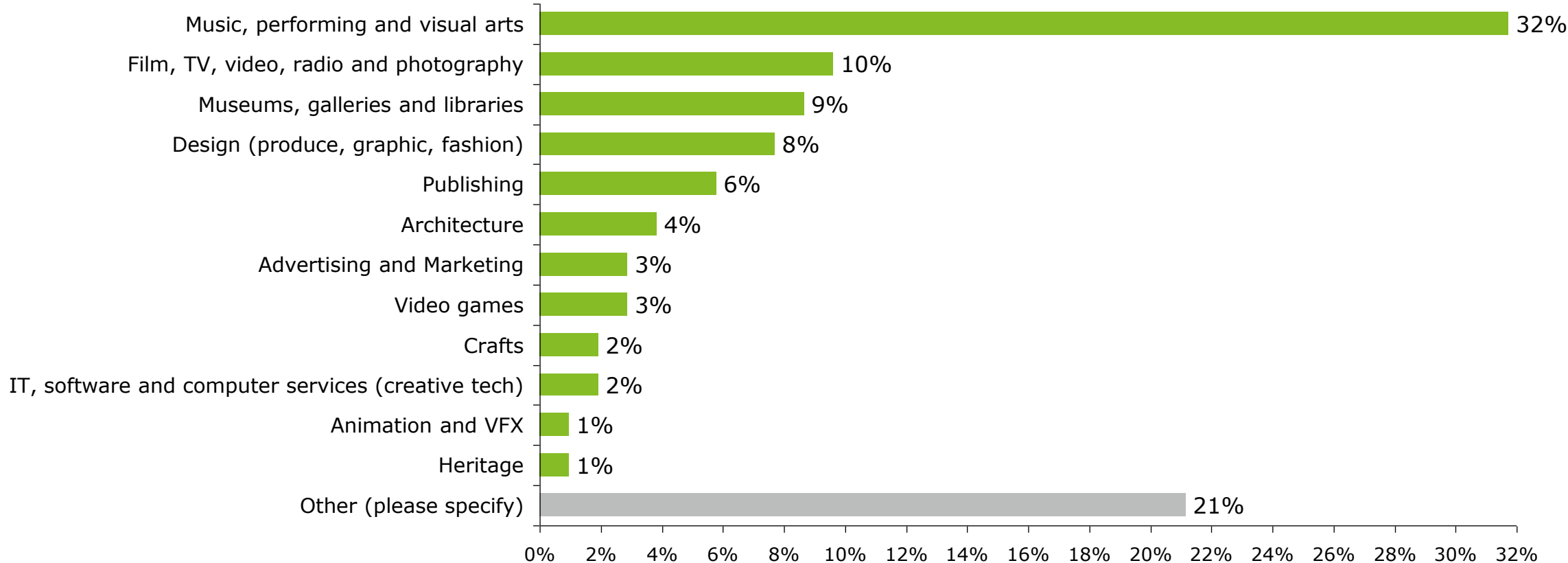
Respondent's primary status (n=110)

Charity / Not for profit	34%
Business	23%
Educational and skills provider	18%
Creative individual / freelancer	13%
Trade body	9%
Other (please specify)	4%

Q. Which of the following best describes you / your organisation's primary status?

One third of survey respondents represented a music, performing or visual arts organisation; a long-tail of respondents did not fall within a predefined creative sector

Respondent's creative industry (n=110)

Industry	Percentage
Music, performing and visual arts	32%
Film, TV, video, radio and photography	10%
Museums, galleries and libraries	9%
Design (produce, graphic, fashion)	8%
Publishing	6%
Architecture	4%
Advertising and Marketing	3%
Video games	3%
Crafts	2%
IT, software and computer services (creative tech)	2%
Animation and VFX	1%
Heritage	1%
Other (please specify)	21%

Q. Which creative industry do you / does your organisation primarily operate in? (if multiple please choose the most relevant)

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