

## **Creative and Media LMI**

### **1. Definition of Sector**

Creative and Media is one the UK's major unique selling points or USPs; prodigious, professional and high quality output makes the UK a world-class player in Creative Media and the market leader in Europe, the creative industries, at the heart of which is Creative Media, '... are critical to this country's cultural and economic success, (NESTA) contributing more than £50 billion to the economy every year. They also generate important 'spillover' benefits for other sectors that work with them to create innovative products and services.<sup>4</sup>

There are an estimated 25,200 Creative Media companies (not including sole-traders). The vast majority (77%) of companies are small (fewer than 10 people) with a fifth (19%) of the workforce and 1% of companies are large (200 people and more) employing 35% of the industry's workforce.

The Creative Media industry has suffered at the hands of the recession not least in terms of employment but remains a significant employer across the UK. Half a million people work in the industry and a further 130,000 are employed in Creative Media occupations in other industries. In addition Creative occupations, a sub-set of which includes Creative Media and software publishing, have experienced unprecedented growth in recent years and employment has been growing at 2%, comparing favourably with a 1% average for the whole economy.

The Creative Media industry is reliant on a wide range of occupations from creative and technical such as construction, set crafts, web/interactive content design and visual effects, through to management and business roles, all of which benefit from applied Creative Media specific knowledge.

### **2. National Overview**

#### **2.1 - Visual Arts and Publishing Industries**

##### **Animation**

##### **Facts and Figures**

The Animation industry has over **250** businesses, compared with 22,122 in the Creative Media sector as a whole. The Animation sector is characterised by a high proportion of small and medium businesses, and very few big companies. Over half (57%) the companies in the Animation industry employ 10 people or fewer, with 29% employing between 2 and 4 people, and 28% employing between 5 and 10. A further 20% employ 11 to 24 people, and 15% employ 25 to 49 people. Only 8% of companies in the Animation sector employ over 50 people. This compares with the Creative Media as a whole<sup>5</sup>, where 19% of companies employ 10 people or fewer, and 56% of companies employ more than 50 people.

A total of **4,700** people are employed in the Animation industry.

### **Trends**

The size of the Animation industry workforce has increased. In 2000, the Animation workforce in the UK was 1,300 people strong, and now (2009) has 4,700 people.

The animation workforce is based throughout the UK though concentrations are found in the South East of England (21%) and Central London (21%).

## **Computer Games**

### **Facts and Figures**

Overall the Computer Games industry has around **220** businesses which are shared among three sub-sectors as follows: around 155 games development companies, around 30 games publishing companies and around 35 games support companies (including those working in middleware, tools and technology). There are 40 or so companies specialising in mobile content for the Interactive Media sector.

A total of **8,850** people are employed in the Computer Games industry. This is estimated to be 2% of the entire Creative Media workforce.

### **Trends**

The Computer Games industry has a variety of company sizes, with a similar proportion of very small and large companies in the sector. A quarter (25%) of companies in the Computer Games industry employ between 1 and 5 people, one in ten (11%) employ between 6 and 10 people, and two in ten employ each of 11 to 20 people (18%) and 21 to 50 people (21%). The remaining quarter (25%) of the industry has more than 50 people working for them, which includes the 5% with a workforce of more than 200. Almost all of the larger companies are either developers or publishers.

## **Facilities**

### **Facts and Figures**

The Facilities sector includes more than **3,900** employers. This is made up of, other services for film and television e.g. make-up, set building, location services and archives (2,584), post production (546), studio & equipment hire (490), manufacture of Creative Media equipment (122), special physical effects (90), outside broadcast (53), processing laboratories (9) and transmission (8).

A total of **45,050** people are employed in the Facilities sector, and this is estimated to be around one tenth (9%) of the entire Creative Media workforce

### **Trends**

Over half (54%) of employers in the Facilities sector have just 1-5 staff.

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A further fifth (21%) have 6-10 employees, 11% have 11-20 employees and 8% have 21-50 employees. The remaining 5% have 51 or more staff (including just 1% with 200+).

The Facilities workforce includes,,: other services for film and television (22,550), post production (7,800), studio & equipment hire (7,000), manufacture of Creative Media equipment (3,600), transmission (1,750), special physical effects (1,450), outside broadcast (600) and processing laboratories (300)

## **Film**

### **Facts and Figures**

In the digital world the fair and open access to distribution is important. The traditional film industry consists of the following six elements:  
Development, Production, Facilities, Distribution, Exhibition Leading to Export

There are around **400** permanent companies in the film industry but this can fluctuate depending on the number of productions that are being worked on at any time.

### **Trends**

Of the permanent companies around 43% are production, 13% are distributors and the remaining 44% are cinema exhibition companies.

Within the exhibition sector there is a wider variety of company sizes and around three in ten (31%) employ between 1 and 10 people, a third (34%) employ between 11 and 25 people and two fifths (37%) employ 26 people or more. In film distribution there are more small companies and four-fifths (82%) employ between 1 and 10 people.

## **Interactive Media**

### **Facts and Figures**

Overall the Interactive Media industry has in excess of **8,000** businesses which are shared among four sub-sectors as follows: around 7,500 web and internet companies, around 500 offline multimedia companies, around 40 companies specialising in mobile content and a growing number of interactive TV companies.

A total of **39,750** people are employed in the Interactive Media industry. This is estimated to be 8% of the entire creative media workforce.

### **Trends**

The Interactive Media industry is characterised by a large number of small companies and very few big companies. Almost half (46%) the companies in the Interactive Media industry employs between 1 and 5 people and a quarter (23%) employs between 6 and 10 people. A further 15% employs 11 to 20 people and 13% employs between 21 and 50 people. Just 3% of the industry has more than 50 people working for them.

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At a given time the Interactive Media workforce can broadly be divided as follows:

- almost three quarters in web and internet (73%),
- approaching a quarter in offline multimedia (23%),
- just 2% in interactive TV
- 1% in mobile content
- Almost 24,000 people in Interactive Media (60%) work in Interactive or Games Production making this by far the largest occupational group within the sector.
- A further 6,100 people (15%) have roles in Interactive or Games Business
- 1,100 have roles in Interactive or Games Operations (3%).
- The 6,300 people working in finance, HR, IT, sales and general management roles that fall under an umbrella heading of 'other occupational groups' make up 16% of the Interactive Media workforce.

## **Photo Imaging**

### **Facts and Figures**

The photo imaging industry has almost **14,000** companies, almost half (49% and 6,800) of which are sole trading or freelance photographers. Of the remaining companies in the sector more than half (58%) are in photography, a third (35%) are retail, laboratories or image production companies, 5% are picture libraries and agencies and 3% are manufacturers or support services companies.

### **Trends**

- The industry is mostly made up of small companies and freelancers; including freelance photographers.
- more than nine in ten (93%) of companies employ between 1 and 5 people,
- 5% employ between 6 and 10 people,
- 2% employ between 11 and 20, just 1% employ between 21 and 50
- and just 0.5% are large and employ more than 50 people and many of these can be found in the sub-sector of manufacturing and support services.
- Around 43,700 people work in the photo imaging industry, which equates to around one tenth of the creative media workforce as a whole.
- The majority of the workforce operates within the area of photography (56%)
- or retail (30%) with the remainder employed in picture libraries and agencies (8%)
- or manufacturing or support services (7%).

## Publishing

### Facts and Figures

Historically, publishing has been inextricably linked to the production of printed materials, whether in the form of books, newspapers, magazines or scholarly journals. Whilst the production of print as a medium continues, it is no longer useful to think of publishing only in these terms and a more up to date view is that of publishers organising intellectual property up to the point of (usually) out-sourcing production.

In several publishing sectors they also manage the marketing and sales of their products to wholesalers, retailers or to the final customers.

The publishing sector covers the origination of content and the Publishing of books, journals, magazines, newspapers, news agencies and electronic information services.

Official data sources that rely on the Standard Industrial Classification (SIC) coding system break the publishing sector down into the following sub sectors:

Publishing of books

Publishing of newspapers

Publishing of journals and periodicals

Other publishing

News agency activities

At the moment there are just under **7,200** employing establishments in the publishing sector. The largest numbers of these is are book publishing (36%) and newspaper publishing (30%).

**N.B.** These figures should be treated with caution, however, as they are based on the main business activity of the employer - and it is relatively common for some businesses to have a publishing operation as well as other functions. For instance many charities (e.g. Oxfam) and other organisations (e.g. Royal Horticultural Society) publish books, magazines, etc., and yet they would not be recorded within the publishing statistics.

There are over **200,000** employed in the Publishing industry, representing just less than 1% of all those working in the UK.

- The publishing industry has **five sub-sectors**, of which newspapers, covering both national and local newspapers, is the largest sub-sector employing over 60,000, some 30% of the sector.
- Other publishing employs 47,000, some 22% of the sector.
- The production of journals and periodicals (which covers magazines) employs 41,000,
- 20% of the sector and book publishing (35,000) employs 17%.
- The smallest sub-sector is news agencies which employs 24,000 and comprises 11% of the sector.

### Trends

- The majority of establishments in the publishing sector are small.
- 85% have 24 employees or fewer,
- 95% fewer than 100.
- Whilst the average size is small, 53% of establishments have fewer than five employees,
- 90% have fewer than 25.
- The publishing sector has relatively few large employing establishments – only 204 employing more than 200 employees.

However, although the large companies are numerically small, this does not mean that they are unimportant.

- It is estimated that the 200 or so establishments with more than 200 employees – about 3% of all establishments in the sector, collectively employ some 52% of all employees, a concentration of employment higher than for all industries.
- Newspaper publishing has larger employers than the other sectors. of the 204 companies with 200 employees or more,
- 124 (61%) are in the newspaper-publishing sector.
- At the other end of the scale, other publishing and news agencies have the highest proportion of small establishments and have almost no establishments employing more than 200 employees.

Publishing company sizes also change regionally, with the majority of large companies found in the South East, and a predominance of small companies (less than 10 staff) within Northern Ireland and north Wales.

### Radio

#### Facts and Figures

Overall the Radio industry has around **350** organisations, independent stations and other companies, which are shared broadly among four sub-sectors as follows:

- BBC Radio,
- around 120 commercial radio groups and independent stations,
- around any number of community radio stations
- and up to 50 independent production companies for radio.

The Radio industry is characterised by a small number of large radio groups and a large number of smaller groups and independent stations. The BBC, Global Radio and Bauer dominate the landscape of larger businesses and between them account for a high proportion of the radio sector workforce. Approaching a quarter (23%) of companies in the Radio industry employ between 2 and 4 people, a third (35%) employ between 5 and 10, and a further 17% employ between 11 and 20 people. A quarter (25%) of the

in conjunction with the regional LMI group industry has more than 20 people working for them, which includes just 2% with a workforce of 250 or more.

A total of **22,800** people are employed in the Radio industry.

### **Trends**

At a given time the workforce can broadly be divided as follows:

- almost half in BBC radio (48%),
- over two fifths in commercial radio (42%),
- around one in ten in community/voluntary radio (8%)
- and just 2% in independent production for radio.
- Around 6,400 people in Radio (29%) work in radio broadcasting specific roles.
- A further 5,600 (25%) work in finance, HR, IT, marketing and general management roles that fall under an umbrella heading of 'other occupational groups'
- and 4,700 people (21%) work in journalism and sport roles.
- Other occupations are production (2,300 people - approximately 10% of the workforce) and producing (1,800 people - approximately 8% of the workforce).

### **Television**

#### **Facts and Figures**

Overall the TV industry comprises over **1,450** businesses which are shared broadly among three sub-sectors as follows:

- ten (terrestrial) broadcast TV (within which companies the extent of public service commitment varies, depending on the obligation of their licence),
- around 250 cable and satellite broadcasters,
- around 1,100 independent production companies and a growing number of community TV companies which share the analogue spectrum of 18 Restricted Services Licences.

A total of **55,900** people are employed in the TV industry .this is estimated to be more than a tenth (11%) of the entire Creative Media workforce.

Though this includes broadcast TV and cable and satellite broadcast, independent production and community TV only, it is important to remember the TV industry's strong relationship with facilities companies, whose time is often shared between TV, film, and in some cases music and radio, and tend to be based in clusters close to TV companies.

In addition, there are close relationships between TV companies and those designing and distributing content through interactive, web-based and mobile applications other media through which content can be broadcast.

### **Trends**

The TV industry is characterised by a small number of large businesses and a large number of small companies.

Broadcasters such as the BBC and BSkyB dominate the landscape of larger businesses and increasingly smaller independent production companies are merging or being bought out by other independent production companies to form much larger businesses, an example of which is RDF Media Group or All 3 Media.

- A quarter (25%) of companies in the TV industry employs between 2 and 4 people
- and approaching a third (31%) employs between 5 and 10 people.
- Two in ten (22%) employs 11 to 20 people
- and 12% employs between 21 and 49 people.
- Just a tenth (10%) of the industry has 50 or more people working for them, which includes 2% with a workforce more than 200 strong.
- Almost 14,000 people in TV (25%) work in finance; HR, IT, sales and general management roles that fall under an umbrella heading of 'other occupational groups'
- and 11,000 people (20%) hold production roles.
- Other dominant occupations are producing, filled by around 7,600 (14%) of the workforce
- and journalism and sport, and around 6,700 (12%) hold these jobs.

## **2.2 Performance Arts**

### **What do we mean by the performing arts?**

We are defining the performing arts as those venues, employers, small businesses and freelancers in the theatre sector (including classical, contemporary, street arts, carnival arts, circus and physical theatre), dance, opera and the live music industry (including live performances of classical, pop, rock and all contemporary forms of music). This includes performers, promoters and those who provide backstage technical input and administration.

### **Facts and Figures**

There are **5,480** businesses and **101,593** people working in the performing arts sector; of these, around 34% are employed in onstage occupations such as acting or dancing.

### **Size of the performing arts sector**

- There are 5,480 businesses in the performing arts industry; the vast majority(90%) employ fewer than ten people.
- The performing arts sector is economically productive, contributing over £44,000 per head each year to the UK economy

## Trends

- Only 12% of music and 16% of visual art organisations have faced recruitment difficulties. Compared to 34% of performing art and 29% of literature organisations
- Advertising and design businesses experienced particular difficulty recruiting to graphic design roles (46% and 32% of businesses respectively), while cultural heritage organisations experienced difficulty with archaeologists and visitor relations roles
- Employers in music were most likely to find that candidates lack the appropriate qualifications (15% compared to 6% across the footprint)
- Advertising businesses and employers in visual arts had significantly more difficulty finding candidates with the appropriate specialist skills, with 74% and 80% of employers respectively stating this as an issue
- Outsourcing work is a particular impact of experiencing a skills shortage for music and visual arts businesses. While for advertising and cultural heritage organisations, skills shortages can cause delays to the development of new products and services.

## Employment

- Employment in the performing arts grew by 20% between 2006-2007 and 2008-2009.
- 90% of performing arts organisations employ fewer than ten people.
- 94% of the industry is white, and 49% is female.
- 73% of the performing arts workforce earns less than £20,000 a year.
- Nearly half (45%) of all those working in performing arts do so in London and the South East of England.
- 45% of performing arts businesses engaged in staff training in 2008/9, but only 11% have accessed public funding to do so.
- At any one time there are 750,000 individuals following cultural sector related courses in further and higher education, and just 100,000 job roles in the performing arts – very few of which are vacant.

## Professional roles in the performing arts

The performing arts sector is made up of a wide range of job roles which reflect all aspects of putting on a performance, including but not limited to the following:

<p>Actor (including TV, radio and theatre work)</p> <ul style="list-style-type: none"> <li>• Agent</li> <li>• Animateur</li> <li>• Armourer</li> <li>• Arts administrator</li> <li>• Automation technician</li> <li>• Box office manager</li> </ul>	<p>Musician</p> <ul style="list-style-type: none"> <li>• Operations manager</li> <li>• Practitioner</li> <li>• Producer</li> <li>• Production manager</li> <li>• Programmer</li> <li>• Prop-maker</li> <li>• Puppeteer</li> </ul>
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<ul style="list-style-type: none"> <li>• Cabaret artist</li> <li>• Carnival artist</li> <li>• Carpenter</li> <li>• Choreographer</li> <li>• Circus performer</li> <li>• Community artist</li> <li>• Company stage manager</li> <li>• Costume designer</li> <li>• Dancer</li> <li>• Deputy stage manager</li> <li>• Designer</li> <li>• Director</li> <li>• Education manager</li> <li>• Electrician</li> <li>• Entertainer</li> <li>• Festival booker</li> <li>• Festival director</li> <li>• Fight director</li> <li>• Flyman</li> <li>• Freelancer</li> <li>• Front of house manager</li> <li>• Fundraiser</li> <li>• Lighting technician</li> <li>• Make-up artist</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Set designer</li> <li>• Singer</li> <li>• Sound producer</li> <li>• Sound technician</li> <li>• Stage manager</li> <li>• Stand-up comedian</li> <li>• Street entertainer</li> <li>• Stunt artist</li> <li>• Technical manager</li> <li>• Technician</li> <li>• Tour manager</li> <li>• Usher</li> <li>• Voiceover artist</li> <li>• Wardrobe assistant</li> <li>• Wigmaker</li> </ul> <p>The business of the performing arts is also dependent on other roles such as administrators, finance, marketing, customer services and IT staff.</p>
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### Skills Gaps

- Advertising (46%) has the highest number of respondents stating that they perceived gaps in the skills base of their current workforce, closely followed by design (44%)
- Only 26% of craft employers perceived that skills gaps were present in their current workforce
- Skills gaps in administrative roles were stated as being present frequently in literature (25%), visual arts (14%), performing arts (13%) and cultural heritage (10%)
- Similar to the picture for the industry in total, a large number of respondents with skills gaps stated that there was no direct impact on productivity and performance from these gaps. However the following sector specific features are of note:
  - 12% of respondents with skills gaps indicated that they were impacting on business development in advertising
  - A lack of digital skills are having a significant impact in design (12%) and advertising (8%)
  - Respondents from the visual arts sub sector stated that fundraising skills gaps were having a significant impact (12%)
  - In literature, finance and accounting (13%) and sales (13%) skills gaps impact significantly on productivity and performance.
  - Specific impacts that skills gaps have on businesses in the creative and cultural industry are as follows;
  - In all sectors except cultural heritage and visual arts, the key impact is lost business

- In conjunction with the regional LMI group  
In cultural heritage and visual arts, however, the key impact is increased workload for others. This impact is the joint most significant along with lost business in visual arts and craft also.

## **2.3 Digital**

### **Facts**

The UK has ambitions to be at the leading edge of the global digital economy. This includes the upgrading of digital infrastructure in the UK; the importance of investment in quality Creative Media and online services; and the need to ensure that everyone can participate in the digital society through action on universal connectivity and digital media literacy.

The review of infrastructure as part of Digital Britain included a review of our position globally in terms of both the 'pipes' (technology infrastructure and broadband access) and the poetry (creative content).

The report and recommendations identified the potential for the UK to increase its position in the global league table with the right strategic focus from both government and industry.

- Skills and people were very much at the centre of this analysis and the Digital Economy is now an identified sector of national priority.
- New platforms require new technical skills, and the development of new business models,
- flexible and adaptive management and visionary creative leadership.
- Traditional production processes are being questioned, and new techniques rapidly move from "cutting edge" to industry standard.

Although the importance of learning the skills to use technology cannot be overstated, the benefits of a fully digital workflow will only impact when production staff embrace and adapt to the collaborative working enabled by new techniques.

The increasing importance of digital content has led to an increase in the value of specialists in this discipline, expanding existing roles and creating entirely new roles. This has the knock on effect of increasing employee churn and higher salaries.

Across the industry as a whole, people are required to have a broader understanding of technologies related to their function, be it software, hardware or communication technology.

## **2.4 Print Media**

Print is a vital medium for companies everywhere.

- The UK printing industry is an exciting and essential part of the economy. It serves all areas of business and leisure by producing a vast range of products that are an essential part of our everyday life.
- In business, print is used to help communicate information, demonstrate commercial advantage, create impact and make headlines.
- Print uses eye-catching designs to help companies stand out in today's marketplace.
- As well as business, the print sector produces large amounts of material for our education system, our entertainment and other sectors, it serves every part of the UK's economy.
- The printing industry uses the latest and best technology that is available. It needs bright, creative, enthusiastic people with wide ranging skills.
- Print companies tend to become specialists within their own field, as different types of end product each require slightly different machinery and these machines are often very expensive.

## Facts and Figures

### Specialist production areas:

Magazine printing	carton production (foods and containers)
Stationery	label production
Printing on metal	catalogues
Books	brochures
Cards	Fine art reproduction
Newspapers	Security printing
Exhibition stands	t-shirts
Etc	

### Service areas include:

Sales, Accounts, order estimation, design and proof reading, production, delivery or orders, Graphic design, marketing, web design/and /or advertising.

Team working is an essential skill to support the delivery of quality 'customer order to delivery' work flows.

### Employment information

The sector offers a wide range of jobs all offering fast paced and challenging work. A career in print may start in production with a position as a machine assistant, a trainee operator, a trainee bookbinder, carton manufacture and design as an assistant. Alternatively you could find work as a graphic designer using specialist software or as a trainee print finisher.

### Examples:

Pre-press operatives	Print buyers
Machine Printers	Print estimators
Sales reps'	Graphic designers
Print studio managers	Print finishers

### Specialist skills

Good communication	Able to work to a budget	Time management	Computer software skills
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skills			
creativity	innovative	Team player	Can accept criticism
Good concentration	Good hand eye co ordination	Self motivated	Problem solving

### 3. Yorkshire and Humber Regional Overview

#### Facts and Figures

- Employment in the creative media industries in Yorkshire and Humber **exceeds 24,000**, which is around 5% of the entire creative media industries.
- Publishing, Photo Imaging, Interactive Media and Television dominate the creative media industries in Yorkshire and Humber.

Below is a quick overview of how many people work in each of the creative media industries in Yorkshire and Humber

<b>Television</b>	Over 1,800 people working in broadcast TV, cable and satellite and independent production
<b>Radio</b>	700 individuals working in publicly funded radio, commercial, and community and voluntary radio
<b>Film</b>	Over 100 people operating in the key sub sectors of production live in Yorkshire and the Humber. Others working in facilities (see below) provide services for film, for example in post production. Figures are not available for employment in cinema exhibition at national/regional level
<b>Facilities</b>	Around 1,100 people employed in the sub sectors of post production, studio and equipment hire, special effects and outside broadcast
<b>Animation</b>	No one reported as working in animation companies in Yorkshire and the Humber. This does not necessarily mean there is no sector, just that the employment numbers round to less than 100. Others may also work as animators in other sectors
<b>Computer Games</b>	Over 700 people working in computer games
<b>Interactive Media</b>	5,600 people working for specialist companies in the key platforms of web and internet, interactive

in conjunction with the regional LMI group television and offline multimedia. Others also employed in these roles in other sectors of the economy

<b>Other Content Creation</b>	Around 100 people involved in making other types of content, including commercials, corporate production and pop promos. Because of rounding, this is an extremely crude estimate and may understate the size of the sector in Yorkshire and the Humber
<b>Photo Imaging</b>	Over 2,500 people working in photo imaging
<b>Publishing</b>	Around 10,500 people working in publishing, including books, newspapers, journals and periodicals and directories

### 3.1 Regional Industry detail

- **Animation**  
Fewer than 100 people work in animation in Yorkshire and Humber according to the 2006 Skillset Census. However that is not to say there is no animation activity in the region. For example, **Ay Up! Animated Yorkshire** is a newly established network for people involved in animation in Yorkshire and the Humber. It is run by animation people for animation people, and aims to bring together all the disciplines of animation.
- **Computer Games and Interactive Media**  
New sectors such as computer games and interactive media have now taken over as **major employers** in the region with over 700 people working in computer games and interactive media becoming one of the most significant creative media employers in the region, employing 5,600 people.
- **Film**  
Over 100 people operating in the key sub-sectors of film production live in Yorkshire and Humber. A strong independent film sector has grown around Leeds. Sheffield has an established and growing independent film sector and is home to the nationally recognised **Warp Films** and **Warp X**, the low budget digital production company.
- **Exhibition**  
In 2007, Yorkshire hosted the International Indian Film Awards (IIFA) bringing key industry figures and huge international exposure to the region.
- The Yorkshire Film Archive is one of the UK's most successful and progressive, having recently won major funding to start digitising its archive content.

### **Other content production**

Screen Yorkshire and Yorkshire Forward are working closely with Channel 4 to bring **4IP** to Yorkshire. 4IP is collaboration between Channel 4 and a network of partners across the UK and aims to deliver publicly valuable content and services on digital media platforms.

- **Photo Imaging**  
Around **2500 people** work in photo imaging in the region and over half of these are photographers. Most of the businesses are very small, with over 90% employing just 1-5 people, reflecting the high number of freelancers and sole traders in the sector.
- **Publishing**  
There are **nearly 10,500 people** working in publishing in the region, approximately five per cent of the total publishing workforce.
- **Newspaper publishing** is predominant sector with strong regional and local presses such as Hull Daily Mail Publications (Northcliffe Media), the Yorkshire Post (Northcliffe) and Metro Yorkshire. The **Press Association** - one of the leading press agencies - accounts for almost all those working within this sector through their office in Howden. They also have a highly regarded training business and have a range of projects and links with local schools and universities.
- **Radio**  
**700** individuals work in publicly funded radio, commercial, and community and voluntary radio in Yorkshire and Humber. There are five BBC local radio stations in the region and approximately **20** commercial radio stations of which Galaxy is the largest. Community broadcasting is also present in the region including Bradford Community Broadcasting (BCB), one of only **15** radio stations throughout the UK broadcasting a full-time 'access radio' station licensed by the Radio Authority. Channel 7 based in Immingham at Imimage 2000 Studios is another example.
- **Television**  
Over **1,800** people work in broadcast TV, cable and satellite and independent production. The region has a rich history of media production due in part to ITV Yorkshire being based in the region. ITV Yorkshire has a strong drama base, producing Emmerdale and several network dramas including Heartbeat, The Royal and The Royal Today. The BBC has two main centres in the region BBC Yorkshire and BBC East Yorkshire and Lincolnshire

#### **4. Key Trends 2006-2009**

- There has been a major decline in employment across the board, in every sector except independent production and cinema exhibition. The areas hit hardest are Terrestrial Broadcast, special physical effects, corporate production and computer games.
- Representation of women has fallen dramatically from 38% to 27%; interactive media commercials, pop promos, corporate production and animation have seen the biggest drop.
- The share of employment in West London has decreased from 16% to 13% and increased proportionately in North West England from 6% to 9%, reflecting the relocation of part of the BBC's workforce from White City to Salford Quays.
- 7% of total workforce in Yorkshire and Humber with majority in London 46% and in South East 7%

#### **5. Unique Facts about the industry**

- Word of mouth is recognized as an important way of getting a job in the Sector, employers prefer to take on someone who already has some links in the industry. Formal advertising and recruitment are unusual in the sector industries.
- Lack of information on the range of occupational roles also complicates the picture and employers report that the X Factor generation have little knowledge about wanting to work in the Media and even less about how to enter.
- Most sectors of the industry have long been characterised by an oversupply of potential new entrants keen to enter an area commonly seen as glamorous and exciting. One result of this oversupply has been a high level of voluntary or unpaid working undertaken in order to get a foot in the door and a first paid job: more than two fifths (44%) of the workforce in Creative Media report having worked unpaid in order to get into the industry.

#### **6. Current Employment Information**

- Creative and Media is highly skilled and one of the most highly qualified in the economy;
- 57%<sup>32</sup> in Creative Media has a degree or equivalent level 4 qualification compared with
- Freelancers in particular tend to have degrees (57% compared with 54% of employees).

Total employment in the sectors covered is estimated at **188,150**, a decrease from **202,000** in 2006. Information on the employment sectors indicates that total creative media employment remains around **500,000** people.

in conjunction with the regional LMI group

- around a quarter of the workforce is freelance (24%), a slight decrease from 27% in 2006. Freelancing is most prevalent in those areas most closely involved in the production process.
- London and the South East continue to be the base for well over half the workforce, though as already noted, employment has increased in the North West at the apparent expense of West London.

## Regional Employment in the Industry, 2006 – 2009

Sector	2006	2009	%Change
<b>Television</b>			
Terrestrial Broadcast	20,800	15,750	-24
Cable and Satellite	13,700	1,700	-7
Independent Production	20,950	21,700	3
<b>Radio</b>			
Broadcast Radio	22,400	19,900	-11
Independent Production	400	1,000	150
<b>Facilities</b>			
Post Production	7,800	7,450	-5
Studio and Equipment Hire	7,000	5,900	-16
Outside Broadcast	600	300	-50
VFX	N/A	6,900	N/A
Special Physical Effects	1,450	700	-52
Manufacture of AV Equipment	3,600	2,900	-19
Processing Labs	300	300	
Other Services for Film and TV	22,550	18,600	-18
<b>Film</b>			
Production (excluding freelancers)	N/A	1,300	N/A
Distribution	1,200	1,200	
Exhibition	16,600	17,650	6
<b>Animation</b>			
Commercials and pop promos	3,500	4,100	-7
Corporate Production	6,350	3,950	-38
<b>Interactive Media</b>			
Online content	29,000	27,550	-5
Mobile content	400	800	100
Offline Multimedia	9,700	2,750	N/A
other interactive media	N/A	3,100	N/A
<b>Computer Games</b>			
Development		5,500	
Publishing	8,850	1,350	-20
<b>Archives and Libraries</b>			
		350	
<b>Total</b>	<b>202,000</b>	<b>188,150</b>	<b>N/A</b>

*NB Figures rounded to nearest 50 Source: Skillset Census 2009*

## 7. Reality Check - Skills and Qualities wanted by employers in the sector

The creative media industries value **strong communication skills** and the **ability to think creatively**. However, the ability to **work well under pressure** and to firm deadlines is also crucial. If you **enjoy working** in a dynamic workplace as a **member of a team**, are **flexible** and can **think on your feet**, you're probably well suited to working in this highly rewarding sector. **Plus** a very sound understanding of the industry

### 7.1 Changing Skills Needs

Employers are least likely to state that their current workforce displays skills gaps in **England (36%)**, compared to **44% in Scotland**, **42% in Wales** and **41% in Northern Ireland**.

England followed the UK creative and cultural industry pattern of skills gaps most closely, as may be expected given that it contains the majority of the workforce.

There is no marked difference in the pattern of reasons for skills gaps across the four nations.

Employers concur that the four main reasons for experiencing skills gaps are;

- Lack of time available for training
  - Lack of experience in the role
  - 'Other' reasons, and
  - Limited budget for training
- 
- Employers in England are the least likely to perceive that skills gaps are having a significant impact on the performance and productivity of their business; 40% of employers were of this view, compared to 24% in Wales and 22% in both Scotland and Wales<sup>1</sup>. So not only are employers in the three devolved nations more likely to experience skills gaps, but they also perceive them to have a greater impact.
  - ICT skills gaps are seen to have the greatest impact in England and Wales, while in Scotland this has been through a gap in marketing/advertising/PR skills. Employers in Northern Ireland concur with the Scotland perspective, with marketing/advertising/PR skills gaps being perceived as having the greatest impact

**UK Future Skills**

Research undertaken by the UK Commission for Employment and Skills suggests that, over the next seven years, the creative and cultural industries across the UK are expected to grow by a further **151,000** people in newly created jobs; significantly, **over half of all these jobs (55%)** will be in 'associated professional and technical roles', those requiring specialist technical skills.

**Occupational growth in the creative and cultural industries (numbers in 000's)**



(Source UKCES 2009)

Across all Creative and Media industries, there is recognition of the dramatic changes brought about by the digital environment and the need to 'upskill' to make the most of it.

The following are of particular importance:

Multi-skilling: an understanding of different technology platforms and their impact on content development and digital work flow, and new approaches to working in cross-functional creative / technical teams within and across companies.

Multi-platform skills: the creative and technical skills to produce content for distribution across all potential platforms, and the ability to understand and exploit technological advances.

Management, leadership, business and entrepreneurial skills: especially project management for multi-platform development; the hybrid skills combining effective leadership with innovation, creativity and understanding of technology, and the analytical skills to understand audience interests and translate it into business intelligence.

in conjunction with the regional LMI group  
Intellectual Property (IP) and financial regulation of multi-platform content:

understanding of intellectual property legislation to protect from piracy, and exploiting intellectual property internationally to take full advantage of emerging markets - with particular focus on the ability to deal with the problem of illegal downloading and copyright infringement.

Broadcast engineering: continuing to be an area of skills shortage.

Archiving: archiving of digital content is an area which is attracting increased attention as a challenging issue for the future.

- Sales and marketing: is particularly important in commercial radio and an emerging need in other sectors.

## 8. Local Area Information

### WAKEFIELD DISTRICT

#### Facts & Figures

#### EXAMPLES OF DESIGN AND MEDIA OPPORTUNITIES IN WAKEFIELD DISTRICT

There are companies offering:

- Creative designs for brochures, catalogues, exhibitions etc
- Web design companies
- Interior design companies
- Graphic/logo design/branding
- Printing and design

How can you identify these companies?

- Yellow Pages
- Other directories
- Libraries
- Websites
- An excellent web based directory is [www.netparkone.co.uk](http://www.netparkone.co.uk)

In the past the Wakefield district relied heavily on coal mining but is now mainly a distribution, shipping and distribution centre. There are jobs within the creative and media sector but this sector employs a relatively small part of the Wakefield work force. However the district does have a strong association with the arts. Two of the twentieth century's leading sculptors, Henry Moore and Barbara Hepworth were born in the district. Wakefield is blessed in having excellent communication links. The M1 and M62 go through the district and the A1 is at the eastern boundary. There are good train links and

in conjunction with the regional LMI group easy access to Leeds Bradford Airport and Robin Hood Airport. Not only does this make it easy for workers to travel to other areas but also for people to come to this area for work.

Wakefield's cultural and creative industries sector comprises 1,736 work places and employs 14,300 people. This figure represents a total of 10 percent employment within the district. Companies which employ less than 10 people make up 84 percent of the cultural and creative industry work places. 39 work places employ more than 50 people in this sector accounting for 31 percent of the total employees. Within these figures 3,200 people are employed in the visual arts, of these 60 percent work in retail, in specialist shops. 2,700 people work in books and press. The publishing and print sector comprises 82 percent of this field. Approximately 1,900 people are employed in audio and visual work. Finally about 200 people are employed in the performing arts.

### **Examples of Local Media and Creative Businesses**

Wakefield is fortunate that due to its links with Barbara Hepworth a new state of the art gallery - the Hepworth Wakefield is due to open on Wakefield's historic water front in spring 2011.

The district is also home to the **Yorkshire Sculpture Park** at Bretton Hall, an open air gallery which over 250,000 people visit annually. **Wakefield Cathedral** and the **National Trust** at Nostell Priory provide space for local artists and community groups to display and perform work

• **The Castleford Project** which aims to regenerate the town of Castleford includes various creative and media based project including the Sagar Street Gallery.

**Art House** which is a national membership organisation for both disabled and non disabled artists has its headquarters in Wakefield.

**One to One Productions** works within communities and with groups and organisations producing media based work

• **Beam** is an organisation which is concerned with regeneration at a local, regional and national level and offers professional services and programmes in amongst other things, public art in all media. Beam plans to develop the 'New Orangery' a venue in Wakefield which will be a centre for the arts, learning and place making in Yorkshire.

**Lite Structures** based in South Kirkby is the UK's leading music rehearsal facility used by world class bands and musicians.

in conjunction with the regional LMI group Wakefield has the **Theatre Royal and Opera House** which as well as touring companies allows local organisations to present productions. It has close links with Wakefield College.

The two main newspapers in the district are the **Wakefield Express** and the **Pontefract and Castleford Express**. There is also **Ridings FM** which is the local radio station

### **Educational Opportunities**

Wakefield and New College, Pontefract offer media and creative based courses as do some schools with sixth forms. There are also colleges regionally e.g Leeds where it is possible to work towards relevant qualifications and are easy to get to.

### **Sources of Information**

[www.wakefield.gov.uk/](http://www.wakefield.gov.uk/)

[www.justaskwakefield.org.uk](http://www.justaskwakefield.org.uk) (Wakefield's on line 14-19 Prospectus)

Wakefield District Cultural Strategy 2007 – 2012  
(Wakefield District Partnership)

### **Creative and Media LMI for North Yorkshire**

Creative industries make a real contribution to the urban and rural economies.

A summary in 2006 showed that the Creative sector:

- Had been growing fast: since 1997 employment in the Creative sector has grown by 23%
- Employed 30% more people than agriculture
- Employed 3.2% of the entire workforce
- Accounted for 11,600 employees across 1,500 business and 1,102 'sole traders' (individuals who work on their own or "free-lance")
- Was characterised by a large number of sole traders who represent 42% of all businesses
- In terms of employment numbers, the sector was concentrated in the main urban areas of Harrogate, York and Scarborough but the relative contribution to local economies was greatest outside the main urban centres, showing a spread across rural areas.

### **Between 1998 and 2008**

Printing and Publishing businesses peaked at 251 in 2004 and fell back to 227 in 2008

Media businesses rose steadily from 35 to 80 in 2008.

The number of employees in Media peaked at 400 in 2002/03/06 dropping to 300 in 2008, in Printing and Publishing employment rose from 2000 in 1998 to 5,900 in 2007 and then dropped to 5300 on 2008

In 2008 with the Creative and Cultural and E-Skills sub-sectors together, there were roughly 3,700 businesses in York and North Yorkshire. The Harrogate district had the largest share of companies with 28% of the sector's businesses in this district. This was followed by the York district with 23%.

Around 19,000 were employed in the Creative, Media and Digital sector in York and North Yorkshire. The Harrogate and York districts held the largest share of the sector's workforce in York and North Yorkshire with 64% combined.

### **The Recession**

Business failures and redundancies have been happening in the Creative and Media industries. Several significant examples include: the reduction in businesses' marketing spends on advertising and design services and cuts in Local Authority funding leading to job losses in local cultural services.

Until other sectors of the economy are stabilised, in particular the financial sector, there will be knock-on effects to the Creative and Media industries but a firm base has been established and Creative and Media are predicted to pick up quickly once the recovery develops.

### **What has been done to promote the Creative and Media industries?**

There have been several initiatives and developments to promote the Creative and Media industries, for example

- Creative North Yorkshire and Creative York - the website of the York and North Yorkshire Creative Industries Network. This is part of a programme of activity to raise the profile of York & North Yorkshire's Creative industries, enabling them to

in conjunction with the regional LMI group play an increasing role in economic growth, as well as contributing to tourism development and enhancing the quality of life in the region.

- The setting up of Create, Arts in Richmondshire and Rural Arts
- The Urban Renaissance policy has been developing the urban area with an emphasis on Creative and leisure activities
- Leeds City Region – developing the Harrogate, York, Craven and Selby areas

Through the 'new rural economy' agenda the growth of Creative and Media industries will not only bring new employees but should retain potential employees in the area across a full range of qualification levels. They are key to the development of a 'new rural leisure infrastructure' in North Yorkshire, which offers the possibility for expanding markets. Creative industries will feed into other sectors, such as tourism, hospitality and leisure services positioning Creative industries at the centre of the sub-region's economic future.

### **Employment**

In employment terms in 2006, Books and Press was the largest, accounting for 45% of total Creative industries employment in North Yorkshire. 70% of books and press employment was within Harrogate, Scarborough and York. In York and Scarborough, which accounted for 52% of books and press employment, this was almost entirely related to the small number of medium and large newspaper and printing businesses within these two areas.

Audio-Visual accounted for a quarter of all employment, Audio-Visual was concentrated in employment terms, with 64% of all employment based in Harrogate and York (their overall share of Creative industries employment was 51%).

Visual Arts a further 19%, was the most geographically dispersed of the four Creative industries: 26% of employment within Visual Arts was accounted for by the more rural areas of Richmondshire, Ryedale and Hambleton. This compares to the 15% share of overall Creative industries employment within these three areas. This is related to the higher level of self employment which is more common in the rural areas of the sub-region. Employed in Performance - 11% Scarborough has the highest proportion of employment in the performing arts (31.3%), compared with 19% of total Creative industries employment. Scarborough and York between them account for 62% of all employment in Performance. This indicates the importance of tourism within these two areas, as well being a reflection of the kind of cultural facilities that only tend to exist within areas with a certain population size.

### **Harrogate**

Between 1999 and 2003, Harrogate witnessed very strong employment growth in the Creative industries (42.5%). Audio-Visual and Visual Arts including advertising and interactive Media in Audio-Visual and graphic and other design activities within Visual Arts.

Harrogate is the third component of the 'golden triangle' with Leeds and York. Its desirability and popularity as both a residential and business location does mean that the cost of living and running a business in Harrogate has grown over recent years. This means that the Creative businesses located in the town tend to be higher value. Attracting skilled people is therefore essential to maintaining the success of the Creative sector in Harrogate. At present, this is not considered to be a problem.

in conjunction with the regional LMI group  
Businesses report no shortage of high calibre potential employees, including locals who have attended university and returned to Harrogate, as well as those moving into the town from larger cities such as Leeds, Manchester and London. Harrogate is a centre for digital businesses and including interactive services.

### **Scarborough**

As part of plans to revive the town, Scarborough has had a number of projects directly related to the Creative industries, in particular, the creation of a cultural quarter in the town. The establishment of the CREATE development agency in the town has been an important factor. Despite its struggling economy, Scarborough has the highest proportion of local employment in the Creative industries in York and North Yorkshire. There is a concentration of employment in a few medium to large-sized employers in publishing and, particularly, printing although the latter has declined.

Scarborough also has strengths in performing arts.

Scarborough won the 2008/2009 award for the most creative and inspiring entrepreneurship initiative in Europe, and was also named as the most enterprising town in Britain in 2008.

A network representing and supporting the Creative industries - Creative Coast - was formed in 2006 as a grass roots organisation. The network is composed of designers, writers, artists, film-makers, web-developers and other creatives who live and work on the North Yorkshire Coast.

### **Courses and qualification available in North Yorkshire and York**

27 courses are listed for 2010/2011 and 2011/2012 in the Area wide prospectus - Futures4Me -

[http://nyork.futures4me.com/\(S\(w51l5f55uf3fy255jc1fcjbm\)X\(606d6985-dd54-4a08-b14a-07b9229c386c\)\)/KeywordSearches.aspx](http://nyork.futures4me.com/(S(w51l5f55uf3fy255jc1fcjbm)X(606d6985-dd54-4a08-b14a-07b9229c386c))/KeywordSearches.aspx)

2 in Craven, 1 in Hambleton, 8 in Harrogate, 3 in Coast, 1 in Richmondshire, 6 in Ryedale, 1 in Selby and 13 in York.

There are important urban centres within easy travel distance from North Yorkshire where courses in Creative and Media are run. These include the following areas/towns with their own Area Wide Prospectus:

- Darlington, Stockton-on Tees, /Middlesbrough, Redcar and Cleveland
- East Riding and Hull, Doncaster,
- Wakefield, Burnley, Leeds
- Lancashire/Blackburn/Blackpool

### **Companies**

York and North Yorkshire is home to many successful Creative companies including:

- **Robot-food** - a design company in Harrogate that has been commissioned to produce labels for a series of up-market Argentinean wines to be sold in the US
- **Visual Retailing** - a company that creates virtual reality software for the fashion industry, originally based in York but now located in Boroughbridge

- in conjunction with the regional LMI group
- **NYnet** - a public and private funded venture to provide a world-class, high speed infrastructure across York & North Yorkshire to offer better broadband services to around 50,000 small businesses and home offices
  - **Save 9** - a Scarborough IT company that has a number of high-profile clients and has recently been short listed for the Best IT Consultancy award at the 2009 Yorkshire Digital Awards
  - Pickering-based '**That Company Called If**', which has won a tender to supply Olympic bookmarks
  - **Barker Brooks Media Ltd** of Harrogate
  - **Meritec Ltd** of Skipton - IT Consultancy and Project Management.

**Creative Blueprint** A regional plan for the York and North Yorkshire Creative and cultural industries May 2009

- **Calderdale and Kirklees**

In 2010, Calderdale Council put funding into Creative Calderdale, a project to promote the area's digital and creative industries. The council estimates there 900 creative businesses in Calderdale – digital design agencies, photographers, digital and television content. Hebden Bridge has a strong artistic community and Sowerby Bridge is a centre for PR, design agencies and 3D arts <sup>4</sup>.

### **Facts and Figures**

The creative and cultural sector is a small but important part of the Calderdale and Kirklees economy and as in the rest of the region, it is growing. Growth in these industries is typical of many parts of the UK in that there is no one outstanding specialist industry. However, support for this sector from Yorkshire Forward, the region's development agency, the local councils and individual entrepreneurs has meant the expansion of the sector is growing at an increasingly fast rate.

The majority of people working in the sector locally work in small companies employing fewer than five people; many are either freelance workers hired by other businesses or are self-employed. It is not unusual for some people to be offering more than one service or running more than one self-employed business for example, printing and designing T-shirts, and running art workshops.

Industries within the sector that are strongly represented include web-design, advertising and marketing agencies, graphic design agencies, printing and publishing. A small but growing part of the sector locally includes video, multimedia, TV and film production, and community arts and training companies using performing or visual arts to run workshops, education and training events. Also to be found in the locality is events management, photographers, copywriters, games designers, product designers, interior design and music production companies.

Creative jobs are also to be located within other sectors locally. Both Calderdale and Kirklees have local newspapers; some local companies such as Mamas & Papas have their own in-house advertising and/or marketing departments; many larger companies also have their own public relations staff; larger retailers employ window dressers; and manufacturing companies may employ designers for example, textiles and clothing sector.

Collecting data about such a small sector as creative and media is difficult. Some of the changes could be due to being previously unaware some of the businesses existed initially. The following data about Calderdale and Kirklees should be seen as a guide only and read with caution.

The 'creative' sector in Calderdale is growing but it accounts for a very small number of people employed in the area. In 2008 the number of businesses in design was thought to have risen by over 60% in 10 years, to 245. It employed 1,100 people, up by over 80% in the 10 years since 1998. In 2008, the number of media business was thought to be as few as 27 employing 100 people; prior to 2002 the number of businesses was not known. The number of printing and publishing firms has decreased by 28% to 72 and the number of people employed by them has also decreased to 700, a 46% decline over the same 10 years<sup>1</sup>.

Kirklees has a small but growing digital and media sector. Over 90% of Kirklees' creative businesses employ less than 10 people. Information from Kirklees Regeneration & Economic Development Service suggests that between 2008 and 2015 the number of Kirklees jobs in culture, media and sport could rise by nearly 12%, to 3,810 jobs<sup>2</sup>. However, a later forecast from Experian revised down the figures used, suggesting between 2009 and 2014 there will be a 5.3% rise to 3,443 jobs in culture, media and sport<sup>3</sup>. In 2008, design businesses accounted for around 361, a 42% increase in 10 years. The numbers employed in design rose by 33% to 1,600. Media businesses were thought to have increased by 77% to 46 over the same period but the numbers employed remained around 200. The number of publishing and printing businesses decreased by 17.5% to 141, over the same 10 year period. The number of people employed in printing and publishing rose slightly to 3,800<sup>1</sup>.

The Elsie Whiteley Innovation Centre in Halifax opened in 2004 to provide space for digital and new media companies. Dean Clough in Halifax is also home to local artists, Northern Broadsides Theatre Company and BBC local radio. Halifax has its own long established theatre, the Victoria Theatre.

The University of Huddersfield is the base for Huddersfield Business Generator, which supports new creative businesses. The Media Centre in Huddersfield provides workspace for new digital and creative industries; it expanded in May 2007 when it opened a brand new environmentally friendly five-storey building. Kirklees also has its own theatre the Lawrence Batley Theatre and Huddersfield Town Hall is a well known venue for classical music. In addition, Huddersfield annually hosts its own literary festival and a contemporary music festival.

Both Calderdale and Kirklees have a number of venues where paintings, sculpture and a range of crafts are exhibited and sold – Dean Clough, Hebden Bridge Tourist Information gallery, the North Light Gallery in Armitage Bridge and the main libraries.

This sector can be very vulnerable to changes in the economy. In 2009, Beaumont Street Studios, a long established Kirklees-based video, radio and record production training company closed making a number of people redundant and severely affecting the businesses of a number of freelance workers. Crag Rats, the Holmfirth-based theatre and training company also closed with the loss of 70 jobs. Some of the ex-Crag Rats staff went on to open Circle Marketing, others started the training company The Riot Act and a further corporate training company Juice Learning.

The BBC move to Manchester by 2012 will not only mean greater opportunity to work at the Corporation for people within daily travel but is likely to result in further development of creative companies such as TV production companies and freelance staff. It could also result in other opportunities as staff moving up to Manchester may spend their free time and money on for example, the arts!

Sources: 1) The Digital and New Media Industries in Yorkshire and the Humber, 1998-2008; Yorkshire Forward, 2010. 2) Employment numbers by occupation from 2008 to 2015 for Kirklees; Kirklees Regeneration & Economic Development Service/Regional Econometric Model. 3) Kirklees Occupational Forecast 2007-2014; Experian Business Strategies/Yorkshire Forward Econometric Model, May 2009.4) Insider, November 2010, p50

## **Examples of Calderdale & Kirklees companies working in the sector**

Absolute Media – radio advertising, Huddersfield, Kirklees  
BBC Radio Leeds (branch of, at Dean Clough)

Circle Marketing, Holmfirth, Kirklees  
 Code Monkeys – games design, Dewsbury, Kirklees  
 Creative North – mobile phone games, Huddersfield, Kirklees  
 Cubic State – advertising agency, Halifax, Calderdale  
 Design Mechanics, design agency, Huddersfield, Kirklees  
 DMD Design and Marketing, Elland, Calderdale  
 Higgeldy Piggeldy Patchwork, Hebden Bridge Calderdale  
 Huddersfield Contemporary Music festival (via Audience Yorkshire)  
 Inhouse – advertising agency, Huddersfield, Kirklees  
 Interactive Solutions – web design & development, Huddersfield, Kirklees  
 Jellymould Music productions (via CIDA) – music composition and production,  
 Huddersfield, Kirklees  
 Juice Learning – creative training, Holmfirth, Kirklees  
 Juko Designs – handbag designer, Huddersfield, Kirklees  
 Kirklees Cultural and Leisure Services  
 Lawrence Batley Theatre (via Audience Yorkshire), Huddersfield, Kirklees  
 Lick Digital – direct mail and online marketing, Elland, Calderdale  
 Loca, part of Culture & Leisure Services, Kirklees  
 Lumb Bank – creative writing courses, Hebden Bridge, Calderdale  
 Make – web and digital agency, Huddersfield, Kirklees  
 Manasmitra – South Asian arts including community education, Dewsbury, Kirklees  
 Mill Creative – advertising & design, Elland, Calderdale  
 Mill Productions – TV, film & video production, Elland, Calderdale  
 Music & the Deaf – workshops and other projects for deaf people,  
 Huddersfield, Kirklees  
 North Light Gallery, Armitage Bridge, Kirklees  
 Northern Monkeys – design agency, Huddersfield, Kirklees  
 Pennine Pens Web Design, Calderdale  
 Peter Keal – storyteller, Hebden Bridge, Calderdale  
 Phoenix Radio – community radio, Halifax, Calderdale  
 Piece Hall Art Gallery (via Audience Yorkshire), Calderdale  
 Pure Photography, Hebden Bridge Calderdale  
 Reactiv Media – direct marketing, Elland, Calderdale  
 Rhythmbridge – drum & percussion workshops, Hebden Bridge, Calderdale  
 QT Creative – web and graphic design (via CIDA)  
 Sandra Whiteley School – drama and agent, Halifax, Calderdale  
 Space2Work (office interior design company) [www.space2work.co.uk](http://www.space2work.co.uk) Kirklees  
 Stage Coach – drama, dance & singing, Hipperholem & Lightcliffe, Calderdale  
 Square Chapel Arts Centre (via Audience Yorkshire), Halifax, Calderdale  
 The Riot Act – learning using drama, Shepley  
 Topps Casting (Media Centre), Huddersfield, Kirklees  
 Thingumajig Theatre, Hebden Bridge, Calderdale  
 Victoria Theatre (via Audience Yorkshire), Halifax, Calderdale  
 Webster’s Interiors – interior design, Brighouse, Calderdale

### **Examples of full-time courses across Calderdale and Kirklees**

**Calderdale** – sixth form and further education courses

**Art & Design** – a range of courses including GCSE, A level, BTEC Certificates and Diplomas

**Creative & Media** – Foundation Diploma, Higher diploma

**Drama & Theatre** – GCSE, A level

**Fashion & Fabric/Textile Design** – A level

**Film Studies** – A level

**Graphic Design** – A level, BTEC National Diploma

**Interior Design** – BTEC National Diploma

**Media Studies** – A level

**Music** – GCSE, A level, BTEC Introductory and National Diploma

**Music Technology** – GCSE, A level, BTEC Introductory and National Diploma

**Performing Arts/Studies** – a range of courses including A level, BTEC Certificates and Diplomas

**Product Design** – GCSE, A level

**Textiles** – A level

**Kirklees** – sixth form and further education courses

**Art & Design** – a range of courses including A level, BTEC Certificates and Diplomas

**Creative & Media** – Foundation Diploma, Higher diploma

**Dance** – A level

**Drama & Theatre** – A level, other courses

**Design & Technology** – A level, BTEC Awards and Diplomas

**Fashion & Fabric/Textile Design** – A level, BTEC Certificates and Diplomas, City & Guilds

**Film Studies** – A level, other courses

**Graphic Design** – A level, BTEC National Diploma

**Interior/Spatial Design** – BTEC National Diploma

**Media Production** – BTEC National Diploma

**Media Studies** – GCSE, A level, BTEC National Diploma

**Multimedia** – BTEC National Diploma

**Music** – A level, BTEC Certificates and Diplomas

**Music Technology** – A level, BTEC Awards and Diplomas

**Performing Arts/Studies** – a range of courses including A level, BTEC Certificates and Diplomas

**Photography** – GCSE, A level, BTEC National Diploma

**Product Design** – A level, BTEC National Diploma

**Professional Model Making** – BTEC National Diploma

**Calderdale College** – higher education courses

**Acting Performance** – Foundation Degree

**3D Architectural Interior Design** – Foundation Degree

**Design Practice** – Foundation Degree

**Fine Art** – Higher National Diploma

**Sound & Music for New Media** – Foundation Degree

**Kirklees College** – higher education courses

**Ceramics** – Foundation Degree

**Design and Manufacture** – Foundation Degree

**Fashion Styling and Promotion** – Foundation Degree

**Fine Art for Design** – BA (Hons)

**Graphic Communication** – Foundation Degree

**Photography** – Foundation Degree

**University of Huddersfield** – higher education courses

**Advertising Design** – BA (Hons)

**Architectural and Interior Design** – Foundation Degree, BA/BSc (Hons)

**Architectural Technology and Interior Design** – Foundation Degree

**Broadcast Journalism** – BA (Hons)

**Contemporary Arts** – BA (Hons)

**Contemporary Crafts Design** – BA (Hons)  
**Contemporary Visual Arts** – BA (Hons)  
**Costume with Textiles** – BA (Hons)  
**Creative Music Technology** – BMus (Hons)  
**Digital Film and Visual Effects Production** – BA (Hons)  
**Digital Journalism** – BA (Hons)  
**Drama** – BA (Hons)  
**Exhibition and Retail Design** – BA (Hons) and BA (Hons) top up  
**Fashion Communication and Promotion** – BA (Hons)  
**Fashion Design with Marketing and Production** – BA (Hons)  
**Fashion Design with Textiles** – BA (Hons)  
**Film, Animation, Music and Enterprise** – BA (Hons)  
**Graphic Design** – BA (Hons)  
**Illustration** – BA (Hons)  
**Interdisciplinary Art and Design** – BA (Hons)  
**Interior Design** – BA (Hons) and BA (Hons) top up  
**Journalism** – BA (Hons)  
**Journalism and Media Production** – Foundation Degree  
**Media and Popular Culture** – BA (Hons)  
**Motion Design** – BA (Hons)  
**Music** – BMus (Hons)  
**Music with Drama** – BA (Hons)  
**Music and Promotion** (popular) – BA (Hons)  
**Music Production and Sound Recording** – BA (Hons)  
**Music Journalism** – BA (Hons)  
**Music Technology** – BA (Hons)  
**Music Technology and Audio Systems** – BSc (Hons)  
**Music Technology and Popular Music** – BA (Hons)  
**Music Technology Software Development** – BSc (Hons)  
**Performance** – Foundation Degree, BA (Hons) top up  
**Popular Music** – BA (Hons)  
**Popular Music Production** – BA (Hons), BSc (Hons)  
**Photography** – BA (Hons)  
**Product Design** – BA (Hons), BSc (Hons)  
**Sport Journalism** – BA (Hons)  
**Technical Theatre** – Foundation Degree, BA (Hons) top up  
**Transport Design** – BA (Hons)

### Useful links

[www.cida.org](http://www.cida.org)

[www.imagineanimation.net](http://www.imagineanimation.net)

[www.ft2.org.uk](http://www.ft2.org.uk)

[www.digitalyorkshire.org.uk](http://www.digitalyorkshire.org.uk)

[www.printyorkshire.com](http://www.printyorkshire.com)

[www.theculturecompany.co.uk](http://www.theculturecompany.co.uk)

[www.northernmedia.org](http://www.northernmedia.org)

[www.visionandmedia.co.uk](http://www.visionandmedia.co.uk)

[www.imagineanimation.net](http://www.imagineanimation.net)

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[www.artscouncil.org.uk](http://www.artscouncil.org.uk)

[www.artscouncil.org.uk](http://www.artscouncil.org.uk)

[www.culture.gov.uk](http://www.culture.gov.uk)

[www.the-media-centre.co.uk](http://www.the-media-centre.co.uk)

[www.culture.gov.uk](http://www.culture.gov.uk)

[www.deanclough.com](http://www.deanclough.com)

[www.andco.uk.com](http://www.andco.uk.com)

[www.bmedia.org.uk](http://www.bmedia.org.uk)

[www.screenyorkshire.co.uk](http://www.screenyorkshire.co.uk)

[www.gamerepublic.org](http://www.gamerepublic.org)

[www.calderdaleprospectus.co.uk](http://www.calderdaleprospectus.co.uk)

[www.calderdale.ac.uk](http://www.calderdale.ac.uk)



**HEADLINES:**

- Creative media industries spill over into most other employment sectors. E.g. Digital and ICT, printing, Publishing, business.....
- Creative media makes a major industrial contribution to the UK economy....
- Half a million people work in the industry and a further 135,000 are employed in creative media occupations in other industries e.g. web content managers, photo imaging technicians....
- Yorkshire and Humber has seen the fastest growth on Digital and new Media between 1998 and 2008 of any English region. However, the number of employees has edged downwards since 2004 and it has the lowest percentage share of jobs along with the North East. The number of businesses in the sub sectors is more encouraging increasing by 25% from 1998 to 2008 to 14,900. ICT companies make up the largest share of these: 39 percent in 2008.

**TOP Facts.....**

- **Sub sectors are:**

Visual Arts and Publishing	Nos of Businesses in sub sector approx' (national)
Animation	250
Computer Games	220
Interactive Media	8,000
Photo Imaging	14,000
Facilities	3,900
Film	400
Radio	350
Television	1,450
Publishing	7,200
<b>Performance Arts</b>	5,480
<b>Digital New Media (DNM)</b> 'pipes' - technical infrastructure And 'poetry' - creative content	14,900
<b>Print Media</b>	1,700 in Yorkshire and Humber

- Vast Majority (77%) of companies are small with fewer than 10 people
- Across the whole sector people are required to have a broader understanding of Technologies related to their function, be it Software, Hardware or Communication technology
- Digital Economy require new technical skills, new business approaches, collaborative working through new techniques and the creation of new job roles and expansion of existing roles.
- Print media serves all areas of business and leisure by producing a vast range of products that are an essential part of our everyday life.
- In Yorkshire and Humber Publishing, Photo Imaging, Interactive media and Television dominate the Creative Media sector
- In Yorkshire and Humber sector employment exceeds 24,000 (2009)

Did you know?

Trends

**Animation** industry workforce is increasing:

2000-	2009
1,300	4,700

**Computer Games** industry has 3 sub sectors:

Games Development    Games Publishing    Games Support

Plus Mobile Content for the Interactive media sector

**Facilities** includes: Make up, Set building, Location services and Archives, Post production, Studio equipment hire, Special physical effects, Outside broadcast, Processing laboratories, and Transmission.



**Film** sector (traditional) has these elements: Development, Production, Distribution, Exhibition leading to Export.

In the Digital world the fair and open access to Distribution matters most.

**Interactive Media** industry consists of: Web and Internet, Offline multimedia, Interactive TV and some Mobile content.

The largest Occupational group is Interactive or Games Production (60%)

**Photo Imaging** industry has lots of sole traders and freelancers (49%)

Majority of workforce operates in Photography or Retail and in Picture libraries and agencies or Manufacturing or support services.

**Publishing** has historically been linked to the production of printed materials, which continues today. However, a more up to date view is one where Publishers organise intellectual property up to the point of (usually) out-sourcing production. In other words, they, Publishers sort it out and then get someone else to produce it.

**Radio** industry has a small number of large radio groups and a large number of smaller groups and independent stations.



in conjunction with the regional LMI group  
Occupational areas are: Radio broadcasting, Finance, HR, IT, Marketing, General Management, Journalism, Sport and Production

**Television** has strong relationships with Facilities companies, designing and distributing companies.

Occupational roles are: Finance, HR, IT, Sales, General Management, Production roles, Journalism and Sport

**Courses of interest:**

**Hull College:**

Edexcel creative and media Advanced level3

Foundation Degree - Music performance

Foundation Degree - Music Production

[www.hull-college.ac.uk](http://www.hull-college.ac.uk)

**Grimsby Institute of Further and Higher Education:**

Creative media production Diploma Level 1

Media and Writing

Creative Arts

East Coast media - Skillset media Academy

[www.grimsby.ac.uk](http://www.grimsby.ac.uk)

**North Lindsey College:**

Diploma Level 1 Creative Arts

Diploma Level 3 Art and Design

Diploma Level 2 Creative Media production

Diploma Level 3 Art/Design/Creative Digital Media

Extended Diploma Level 3 Creative Digital Media

[www.northlindsey.ac.uk](http://www.northlindsey.ac.uk)

**East Riding College:**

Level 3 BTEC Extended Diploma creative Media production (TV and Film)

Level 2 BTEC Diploma creative media production

Level 3 BTEC Diploma Creative Media production/Interactive media

Level 3 BTEC Diploma Creative Media Games production

[www.eastridingcollege.ac.uk](http://www.eastridingcollege.ac.uk)

in conjunction with the regional LMI group  
**Performing Arts** employment grew by 25% between 2006-07 and 2008-09  
 90% of companies employ fewer than 10 people.

73% of the workforce earn less than £20,000 a year.



**Remember** - *better skills and qualities mean better salary packages*

❖ At any one time there are **750,000** students studying related courses and just, **100,000** job roles in the performing arts - very few of which are vacant.

**Digital new Media (DNM)** is a national priority sector as the UK's economic development is seen as being inextricably related to this industry.

Print media is a vital medium for all companies. In business it helps communicate information, demonstrates commercial advantage and produces a vast array of products for leisure and commercial use. Anything with Print on it.  
 The industry uses the latest technology

Service areas include:

Design and proof reading	Sales
Accounts	Production
Delivery or orders	Order Estimation
Graphic design	Marketing
Web design/and/or advertising	

### Humber

#### Local companies in the Sector:

- Image 2000- Immingham  
TV and DNM
- Strawberry- Hull  
Web developers and communications
- Mercury- Hull  
Communication and PR
- KCFM- Independent Radio
- Wrecking Ball press- Hull  
Publishers
- Hull truck Theatre company

Source [www.lmihumber.co.uk](http://www.lmihumber.co.uk)