



2023

West London Film & Screen Skills Training Review



**Middlesex
University
London**

JGA
Developing Futures

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Foreword

“ West London is home to many of our nation’s most important screen companies. With Sky, Disney, Discovery, BBC, a host of film studios and a long tail of experienced businesses and talent, combined with its’ close proximity to Pinewood, Leavesden, Shepperton and Elstree, the sub-region leads an industry which generates over £3 billion annually to the British economy. West London employs almost 20% of all UK film and screen industry workers and is forecasted to grow by 1800 vacancies annually to 2025.

Rapid growth driven by demand for streaming now exacerbates existing skills shortages and challenges to recruitment. All sections of the screen industries report challenges recruiting a wide range of craft, technical, business and creative roles. Specific skills gaps are also apparent, some resulting from the structure of the industry itself, with new entrants suffering from lack of sector-specific experience.

Facilitated by the West London Film & TV Skills Hub and a network of screen focused creative enterprise zones, universities, colleges and training providers in West London are working hard to meet these challenges. Across the area there are more than 100 screen industries-related education and training programmes, from levels 1 to 7. Over 1650 students start courses annually, taking advantage of cutting-edge equipment and facilities and strong industry connections.

But we can do more. Our research into learning across West London shows how industry and education can work even more closely to overcome the skills and recruitment challenges that face the Screen Industry today.”



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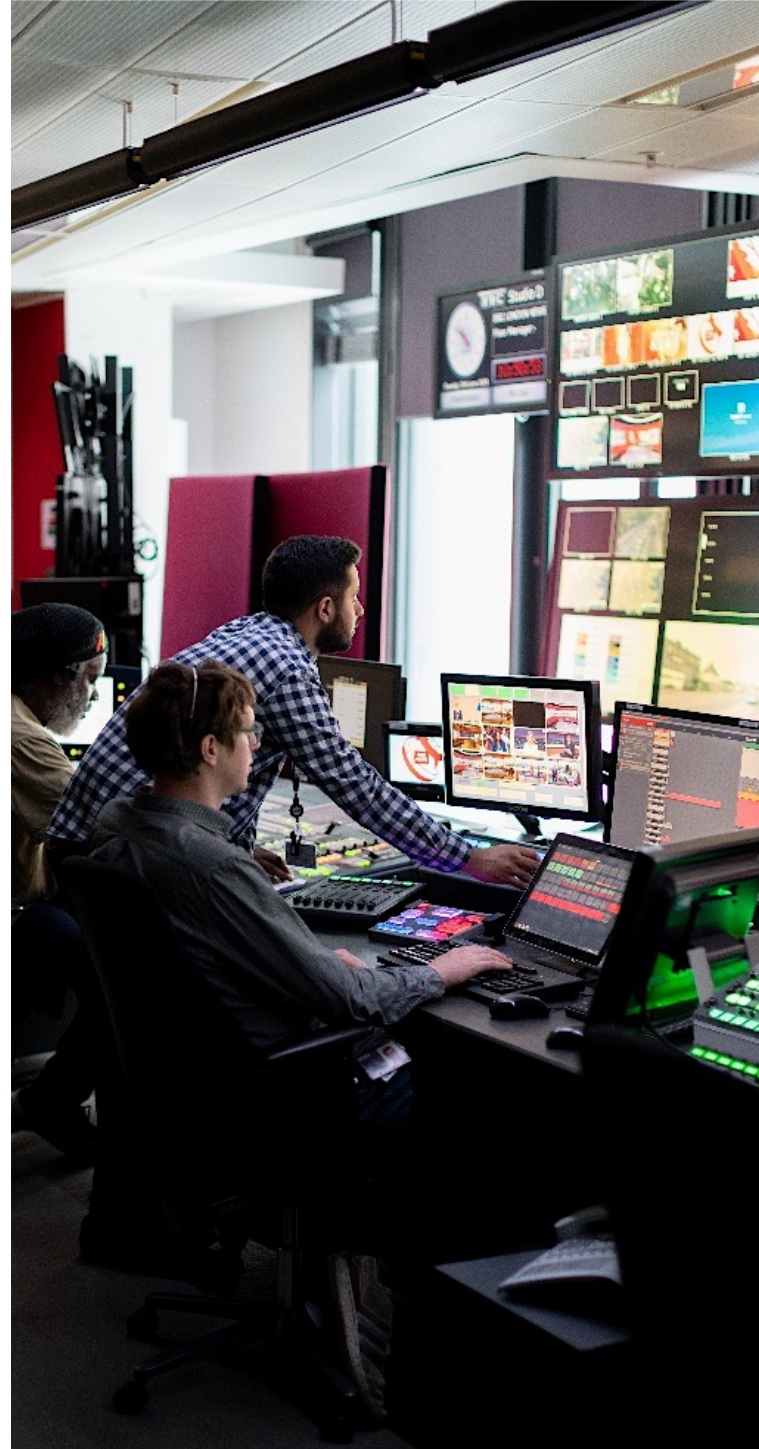
Executive Summary

West London Screen Industry

- The screen industries are growing faster than the overall economy across the UK and in West London.
- West London houses an estimated 20% of the UK's screen industry employment and is forecast to grow until at least 2025.
- West London screen industry employers are conservatively forecast to have 1800 new vacancies annually to 2025.
- There are severe shortages of some crew roles, with production management roles in particularly high demand.
- Crew progression has created skills gaps in the industry, particularly in screen-specific skills, some of which are traditionally taught on-the-job.

West London Institutions

- West London institutions, including universities, colleges and training providers, offer a local solution to crew shortages and skills gaps.
- Institutions offered 116 screen industry-related programmes in 2020-21, with over 1650 students enrolling annually across courses ranging from entry level to post-graduate.
- Students have access to excellent facilities and equipment, preparing them well for work
- Skills gaps can be met more closely through building on existing partnerships between employers and institutions – there are strong examples of where this is working in West London
- More work can be done to transition workers from outside the screen industries into technical, support and craft roles such as electricians, accountants, set production and decoration.



Introduction

The screen industries have an established and growing presence in West London and are one of the sub-region's key growth sectors. There are substantial benefits to West London in encouraging the development of a thriving screen industries sector as one of the sub-region's key growth sectors.

West London has, for example, long been home for the UK's TV and film sector for over 100 years, including Ealing Studios as the oldest continuously working film studio in the world. West London also has a competitive advantage of superior connectivity (Heathrow, HS2), major studio bases (e.g. West London Film Studios, Garden Studios and nearby at Elstree, Pinewood and Shepperton), international players (e.g. Sky, Disney, Discovery, Paramount, NBC Universal, ITV, UKTV, BBC), an experienced workforce and a flourishing supply chain of businesses which include both the largest Prop House (Super Hire) and the largest film camera seller (CVP) in Europe.

The TV and film sector is heavily over-represented in West London as a proportion of all employment (3.2% vs. 0.5% nationwide), with heavy concentrations in several boroughs (7.8% of all employees)¹.

In 2022, Creative Enterprise West (one of the Mayor of London's Creative Enterprise Zones, based in Hounslow), West London Business, Middlesex University, and The JGA Group on behalf of the West London Film & Television Skills Hub, collaborated to undertake a research audit, mapping film and screen education taking place in West London. The project was funded by Middlesex University and the West London Film and Television Hub. The project has been supported by Hounslow Council, West London Alliance and the GLA.

Looking at all universities and colleges with campuses in West London, alongside non-Further/Higher Education training organisations, we mapped the course types being offered against the types of vacancies screen industries employers have.

Why are we doing this audit?

To address the skills shortages, it was important to understand what skills (including transferable skills), training and ongoing learning and development are currently available to freelancers, employees, employers and graduates, specifically to support better career opportunities for those working, or planning to work, in Film and TV-related industries in the West London area.

There are various training providers, academic courses and approaches to training and learning, specific to the screen industries and more generally. And although there have been several national reviews, by ScreenSkills and the BFI, there is not currently a comprehensive list of what is available, and to whom, within West London. Our goal was to understand the current provision of training and ongoing learning and development to support screen industries' career choices and identify any barriers or gaps.

The audit has two outputs:

1. this report, which summarises the findings of the audit and recommendations
2. a spreadsheet mapping available training and learning with comparable and quantifiable details about each training course or learning opportunity, including online self-development as well as structured courses.

¹: West London Alliance and West London Business, 2023. West London Annex to the London Local Skills Improvement Plan

Institutions and Organisations

Further Education (FE)

- Barnet & Southgate College
- HRUC - Harrow, Richmond & Uxbridge Colleges
- Stanmore College
- United Colleges Group
- West London College
- West Thames College

Higher Education (HE)

- Brunel University London
- Buckinghamshire New University
- Middlesex University
- University of West London
- Westminster University

Other Training/Education Institutions

- All Spring Media
- Global Academy
- LAMDA
- Royal College of Art
- The JGA Group
- MAMA Youth
- MetFilm School London

List of subject areas for both FE and HE

- Film/TV
- Animation
- VFX
- Games
- Graphic Design



Wider context

The audit partnership's data was used, along with workshops and additional data sources, to inform the findings in the *West London Annex to the London Local Skills Improvement Plan*, (West London Alliance and West London Business). The screen industries findings from that report are highlighted below.

Sector stakeholder roundtables identified the following skills challenges in the industry:

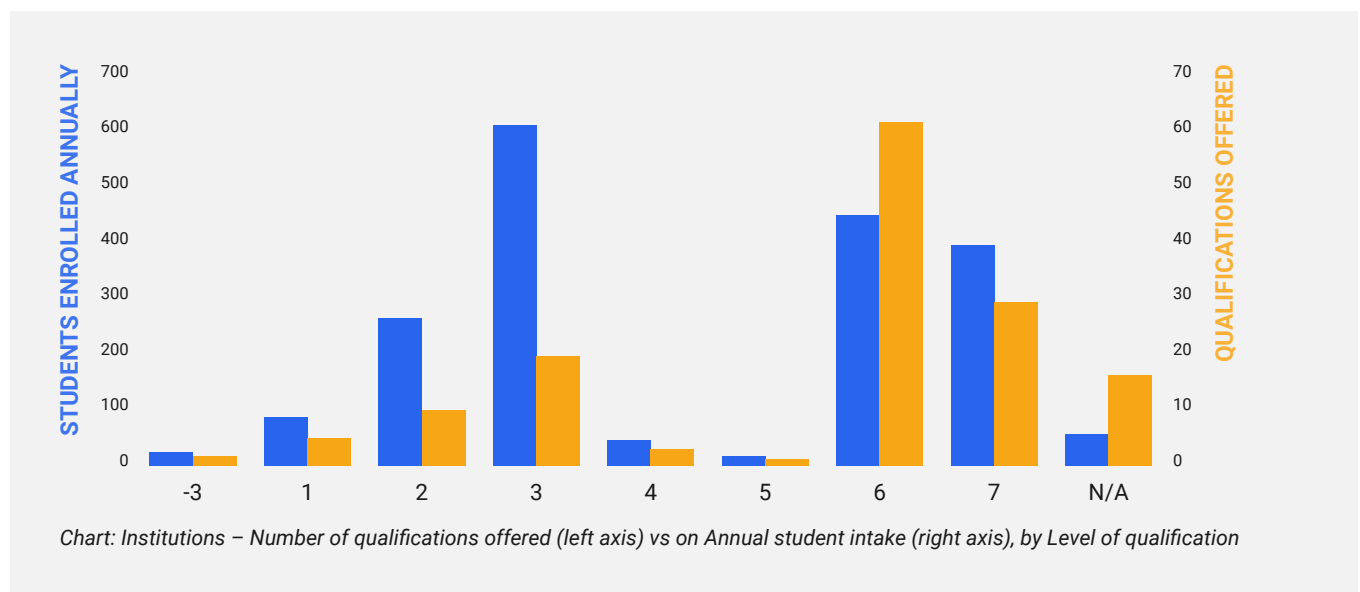
- 'Who You Know', not 'What You Know' access to industry, limits opportunities for many, as jobs are not often advertised, requiring training providers to have up to date (and often personal) relationships with employers.
- Limitations on in-work opportunities created by industry's project-centred approach, core employee base, typically very small, but recruit large numbers of freelancers in the short-term during production. There are several smaller training providers that do this quite well, such as Call Time and The Call Sheet.
- Non-linear nature of creative career pathways creates barriers to engagement for HE/FE.
- Unpaid work placements preclude socio-economically disadvantaged learners, as many cannot afford to take time away from their part-time jobs.
- Employers prioritise individual drive/passion; academic qualifications or experience are not historically a prerequisite.
- Demand within academic courses is heavily focused on extremely competitive roles (director, cinematographer, editor, etc) - unfortunately there exists little demand within courses from people for lesser-known production roles that the industry requires and needs. Industry terminology can be unhelpful for example line producer (project manager), grip, rigger, best boy/woman, gaffer. *It is worth noting that our audit found many of the popular courses were for in-demand roles (entry-level production roles), which challenges this employer observation.*
- Some employers (particularly SMEs) have found that Apprenticeships are too costly, and don't fit with the project-by-project roles in production or the self-employment culture. Roles often pay very well but are not conventional employment in the sense understood by people in more mainstream industries.
- Importance of on-set experience for production-related roles and the challenge of training institutions and bodies to provide. Much of the focus is on 'on-set' TV and film production, with less information on the wide range of opportunities that exist within the 'non-creative' or 'craft' businesses in the supply chain e.g., carpentry, landscaping, finance, business and legal.
- Solving complex problems, requiring a solution specific to the situation, was reported as an issue more often in the creative, media and film sector (64.5%), compared with 47.9% across all sectors. Manual dexterity (e.g., to mend, repair, assemble, construct or adjust things) is reported in the creative, media and film sector (29.8%), compared with 22.3% across all sectors). Adapting to new equipment or materials is reported more often than average as a required skill in the creative, media and film sector (34.1% compared with 28.0%). Setting objectives for others and planning human, financial and other resources were difficult to obtain for creative, media and film establishments (33.7% compared with 30.4% across all sectors).

Audit findings

Courses

Educational institutions in West London offered 116 programmes focusing on screen industries, including Film and TV, Production, Animation, Games and VFX, with some institutions' offerings overlapping. Courses range from Entry level (sub-GCSE equivalent) to Level 7 (Masters), alongside some shorter non-accredited or pre-Level 1 courses, with the majority at Level 6 (undergraduate).

Institutions offering the greatest range of programmes include MetFilm School London, Buckinghamshire New University, and University of Westminster.



Many independent training providers are less qualifications focused, instead emphasising the requirements of specific job roles. Students benefit from modern equipment and facilities, including (collectively):

- 9 studios
- 6 green screen facilities
- 4 Motion Capture (Mocap) studios
- 3 foley suites (sound effects)
- 10 recording studios
- 1 virtual production studio with 2/3 more being procured
- Modern, well-kept technical equipment including cameras, lights, reflectors, microphones, and rigs.
- Over 22 software packages used specifically in the screen industries in pre-production and post-production, e.g., Movie Magic, Pro-Tools and Media Composer.

Institutions leverage extensive relationships with local screen industry employers, including the BBC, Amazon Prime, Final Pixel, Pinewood, and Fausti Films, to create work placements, industry days, employer feedback on their provision and support student progression into work. However, much of this work is ad hoc and/or 'siloed' i.e., there are few strategic and collective relationships.



Audit findings

In 2020/21, West London institutions enrolled over 1650 students across their programmes, with the majority undertaking 'Media' programmes, despite Media courses forming only 39% of those offered across West London. Media courses are typically more generalist than other screen industries programmes. This gives students a wider range of destinations to aim for, but potentially reducing their skills suitability for the screen industries.

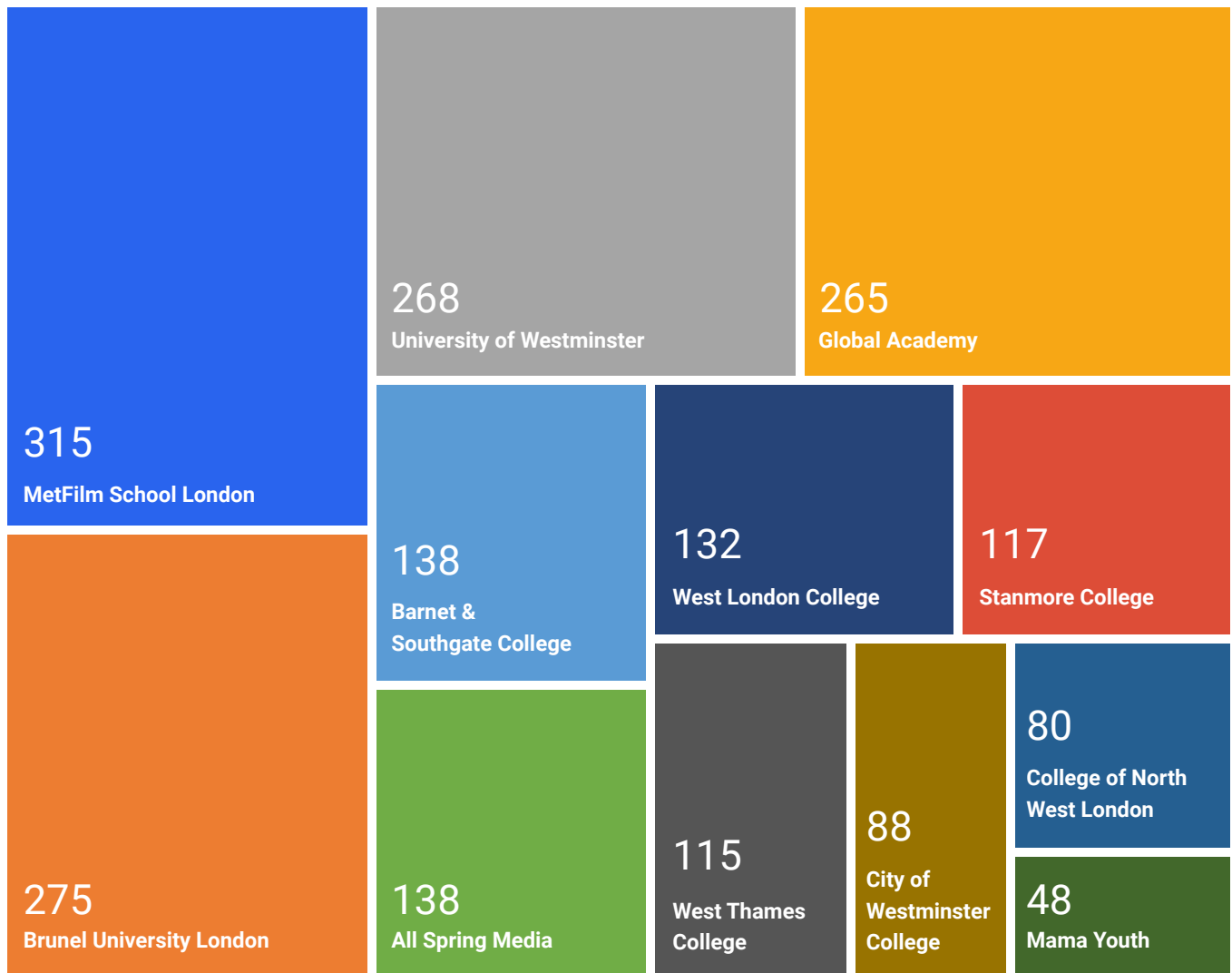
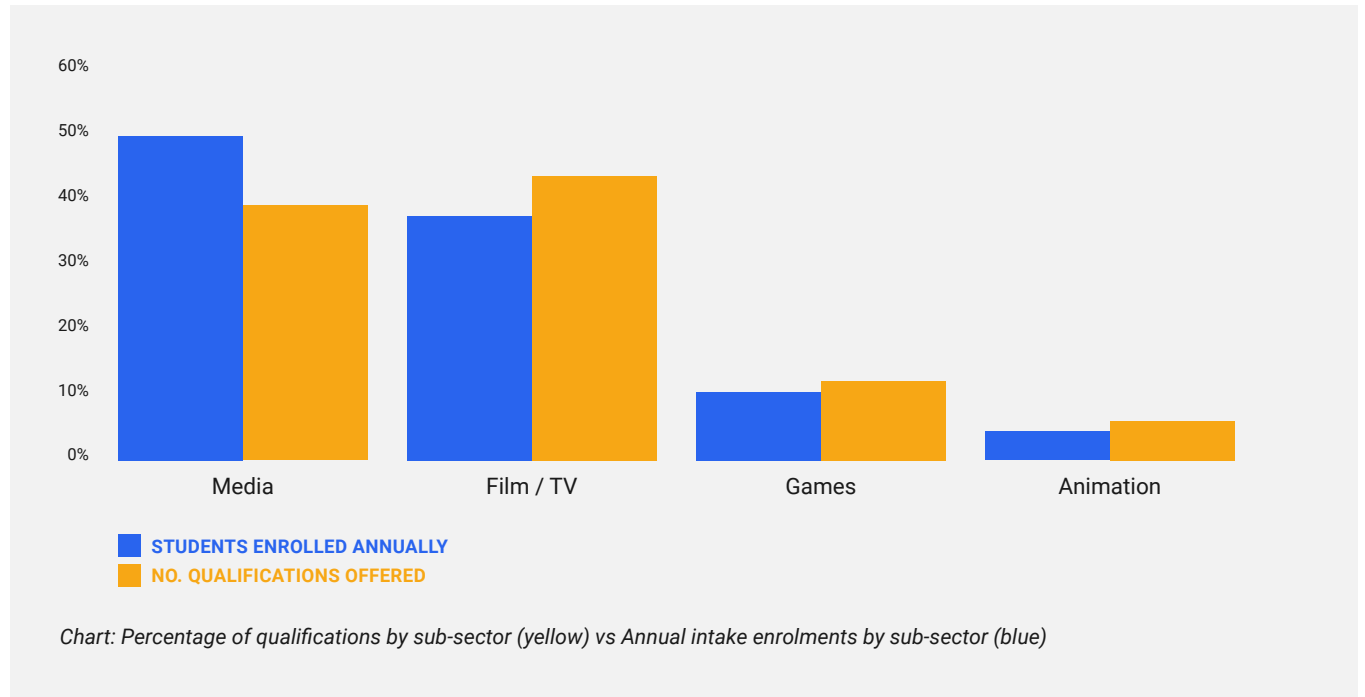


Chart: Annual student intake by institution. There was insufficient data on student enrolments onto Screen programmes to include Buckinghamshire New University, University of West London, LAMDA and The JGA Group. Middlesex University had an intake of 1088, not reflected in the chart.

Audit findings

Despite most courses being at undergraduate level, the most students (38%) are enrolled at Level 3, with another 16% at Level 2. 18% are enrolled on undergraduate programmes and 15% at graduate and above.



Audit findings

Destinations

Although some information is captured about the destinations to which students progress following their studies, it is not comprehensive (for example we have only partial knowledge about how many students complete a course and what proportion then go on to work in film and screen organisation). We also lack knowledge of the names of the employers, the roles and duration of employment. Both HEI and FE are attempting to improve their data capture processes as this information is valuable for the sector in terms of understanding which programmes are most successful at meeting skills gaps.

That noted, there are observations which can be made from the audit findings.

- Students aged 16-18 go on to further learning, typically at Level 3 (if on a Level 2 programme) or degree or foundation diploma if on Level 3.
- One programme has the exception: an estimated 60% of 16–18-year-olds on Global Academy’s Level 3 Extended Diploma in Creative Media Production Technology went directly into jobs in industry (in part due to their relationship with Global, the media and entertainment company)
- Students aged 18+ on programmes at Level 3 tend to go into work in the screen industry, with some going on to higher learning; however, this is taken from a small proportion of courses including apprenticeships, where many learners would be retained by their apprenticeship employer.
- For students aged 18+ on programmes at Level 6 and below, most go into work. This includes work in the screen industry but also journalism, education, advertising and marketing, photography, UX/UI design, social media management and more.
- For students studying at Level 7, most go into work, but working in the screen industries is a minority destination compared with journalism, media management, advertising, consultancies, and communications. This reflects the fact that many Level 7 programmes included in the audit are broadly in the creative sector, including media and journalism.



Audit findings

Independent training summary

Independent training partners are an important part of West London's educational fabric. Organisations including All Spring Media, LAMDA, Global Academy, MAMA Youth and The JGA Group train hundreds of people annually for roles in production, broadcasting, and content creation. These organisations offer a range of programme durations from single day overviews of filmmaking to multi-year programmes. Short courses can act as a low-barrier introduction to working in the screen industries and a pipeline into longer programmes, including in FE and HE.

These organisations also demonstrate strong relationships with employers. All Spring Media's apprenticeship provision and programmes like JGA Creativity Squared are dependent on creative and screen employers. MAMA Youth runs a recruitment company which matches its graduates and alumni into roles in the screen industry. Employers like Sky Productions, Sky Sports, Channel 4, Netflix, and the BBC have supported these programmes, providing training, hosting placements and hiring their graduates.

There are several smaller providers that support the industry's project-centred approach by training small cohorts of freelancers to then be placed directly into productions, including Call Time and The Call Sheet.

Vacancies

ScreenSkills and Nordcity's June 2022 *Forecast of Labour Market Shortages* report forecast 15,130 - 20,770 full time workers would be required in the Film and High-End TV sector by 2025. Taking the average of this forecast, and given West London employs 20% of screen industries' workers, this suggests West London institutions should aim to train around 1800 students into screen industries crew roles, per year, to meet new roles only (this accounts for those leaving the industry for retirement and family care reasons, but not those leaving for other reasons e.g., voluntary workforce attrition) – slightly above the annual intake in 2020/21.

This undercounts vacancies in Games and Animation, as up-to-date forecasts are not available for those subsectors. As of December 2021, the Games industry employed 20,975 people directly across the UK, according to TIGA, the UK Games Industry body, and had grown over 14% year on year. Figures from the Office for National Statistics show that overall Games employment is trending up since 2018.

Although we are unable to be specific, it seems reasonable that Games employment will rise.



Audit findings

Matching vacancies to training

West London's Screen Industry course offerings are well-aligned with many of the vacancy types of the screen industries. **65 types** of roles were identified as skills shortages in ScreenSkills Assessment 2021. Of these hard to recruit roles, all but eleven had courses delivered in West London explicitly mapped against them in our research, showing that institutions in West London have responded well to industry needs.

The 11 types of hard-to-recruit roles which don't have corresponding West London courses

- Back-end programmer
- Background designer
- Colourist
- Costume designer
- Costume jewellery
- Costume prop makers
- Covid safety roles
- Gaffers
- Technical artist directors
- UI/UX designer
- VFX producer

Courses in hard-to-recruit roles are offered at a good range of levels, supporting new entrants into the industry and those seeking to progress and become more skilled; except for post-production, where programmes are only offered at levels 6 and 7.

- **26 roles** identified in Film and TV – courses identified across the region in levels 3, 6 and 7 only 4 roles not covered e.g., riggers & gaffers.
- **5 roles** identified in post-production, but only offered at level 6 & 7.
- Games & VFX had **17 roles** identified however only 11 were specifically covered but had a good spread of levels from 2 through to 6.

Technical, craft and business skills shortage areas are outside the scope of our audit, but research from BFI (BFI Skills Review 2022) and ScreenSkills (Forecast of labour market shortages and training investment needs in film and high-end TV production, June 2022) shows there are **17 non-creative** hard-to-recruit roles, including plasterer, production accountant, and electrician. Some of these have courses offered by West London institutions (for example, All Spring Media offers a production accountant conversion course) or online. The trades-type roles (plasterer, electrician, carpenter, set design) broadly do not seem to have related screen industry courses associated with them in West London (although non-screen industry courses offer a generic programme).

Audit findings

Skills gaps

Skills matches are also critical, with ScreenSkills' September 2022 *'Scripted Production Workforce'* report finding that existing training did not always meet skills needs, with gaps in production and craft roles. The report provided the example of art department entrants being unable to draw by hand... having attended courses that focused instead on computer aided design," while many roles in the screen industries required being able to draw by hand and interpret a drawing.

Several reports note the importance of non-sector specific 'soft' skills including interpersonal skills, remote team leading, mentoring, and organisational skills. It is not clear from our audit that these are always prioritised in screen industries-related courses. Anecdotally, they are not.

ScreenSkills and Middlesex University London released the *ScreenSkills 'Work ready Skills & Experience' (WRYSE) project: guidelines for UK educators and screen industry employers²* in February 2023 outlining best practice guidelines on how professional 'soft' skills can be incorporated into training, via a set of graduate competencies identified through the WRYSE project.

Finally, while not explicitly a skill, employers – particularly in Film and HETV – cite a general lack of how things work in the screen industries for new entrants, which slows down their onboarding and makes recruitment difficult. This includes areas such as understanding how a set works, understanding how to behave in a production office, understanding job roles, etc...

Audit limitations

Our audit was limited by time and personnel. Although many organisations provided us with detailed information, some did not have the information or student numbers, nor did not know where the information might be kept. As a result, some findings, including destination data, are a combination of quantitative and anecdotal.

Some organisations are under-counted – for example, we know MetFilm School London has a significant number of students (160 undergraduates, 155 postgraduates), but we were unable to identify the specific courses on which they were enrolled. As a result, their overall enrolments are averaged across their programmes. MetFilm School also delivers short courses, and we were unable to determine how many students enrolled on those annually.

Finally, for the purpose of this audit we were unable to map the precise curricula for each course. This matters, as the BFI's 2017 report *Future Film Skills* states, because "more general courses – though providing a broad overview of what is a considerable sector – may fail to deliver the industry-specific skills needed..." That noted, our audit shows that many institutions in West London offer quite focused programmes, giving students the opportunity to specialise in production in the screen industry, with the most popular programme, at over 325 students enrolled annually – the UAL Level 3 Diploma and Extended Diploma in Creative Media Production and Technology, a qualification focused on preparing students for work in film, TV, games, and animation.

2: <https://www.screenskills.com/media/6912/wryse-guidelines-report-030223.pdf>

Solutions

Our research and conversations have flagged several best practice examples of education working effectively with industry, and some 'emerging solutions' which, although early in their development and use, hold promise for addressing the challenges the screen industry faces in West London.

Examples of good practice

- **Middlesex University's** 'Co-Production' deal with an independent London-based film production company, which offers students/graduates paid employment on a professional film.
- **MetFilm School's** deep industry-engagement focus, evidenced by their base within Ealing Film Studios, and working with employers to deliver industry-relevant training.
- **MetFilm School** partnership with Garden Studios in Park Royal, taking advantage of Garden Studios' innovative premises to deliver two 6-month programmes: Digital Animation & VFX, and Postproduction.
- **West Thames College's collaboration with Film Fixer's** 'Set Ready' programme on entry level skill development.
- The **West London Film & Television Academy Hub**, a critical part of local infrastructure enables industry partnership with FE/ HE/ ITPs to provide skills training and must be sustained. A great example is the 2023 film-making competition in which students were paired with professionals to carry out every stage of filmmaking with the winning team spending a day at Pinewood.
- **MAMA Youth** programmes target young people who have limited educational and work opportunities by getting them trained and employed in the creative, media and film sector. Businesses are subsequently supplied with a young, skilled and diversified talent pool, which has been successful given that 96% of graduates were in sustained employment a year after they completed their training.
- **Sky Up Academy Studios** offers an immersive learning experience that places young people centre stage as media creators. Students work together, with cutting edge equipment, to create a trailer or news report, as well as receiving a behind-the-scenes tour of Sky. Lesson plans and guides are provided to allow teachers to prepare for the experience.
- **VMI-led Trailblazer** developing an Apprenticeship Standard for Camera Prep Technicians.
- **MARS Academy** delivering virtual production CPD for industry professionals.
- **LAMDA's** new Virtual Production facility, allowing students to gain experience in this cutting-edge field of visual effects in pre-production.



Solutions

Emerging solutions

- Self-employment/business skills training across all relevant courses to prepare for the freelance nature of employment, e.g., FE collaborating with Film Fixer.
- Building on Screenskills' job profiles and career maps, there is a need to map further progression pathways for key roles and create the assets for dissemination to careers advisors.
- Enhance existing partnerships with screen employers to develop a sustainable pipeline of meaningful work experience placements.
- Although large employers do excellent work making their views heard to the likes of Screenskills, the lack of trade bodies creates barriers in the understanding of issues faced by smaller employers.
- Upskilling current talent needs to happen alongside ensuring entry level roles are filled with competent talent.
- Ensuring the focus on mental health following Covid-19 is not lost. A recurring comment in interviews with employers: "a lot of burnout happening".
- People looking to change careers are unaware of sector training routes (e.g., top-up programmes). Stronger mechanisms for raising awareness and improving accessibility are required.



Recommendations

Our audit has made clear that universities, colleges and training providers in West London are a critical element to the screen industry's talent pipeline; educating and training thousands of students annually and building close relationships with employers that improve the opportunities for new entrants to the industry. However, the sector still faces significant recruitment and skills challenges, which must be overcome to maintain its growth and importance to West London and the broader UK economy. Our recommendations are designed to support West London institutions and employers to collaborate and innovate more effectively to overcome these challenges.

- 1 Collaboration: to better prepare students to enter the screen industries and be productive quickly, screen industry employers should work more actively with institutions such as Middlesex University's 'Creative Campus Network' approach to 'Connect, Collaborate and Co-design' provision, embed key skills, engage students, and offer work experience/placements successful examples include Sky/MAMA Youth and MetFilm School/ Garden Studios and MARS Volume.
- 2 HE/FE – must consider short-course modules; provide extra-curricular training; engage and partner with stakeholders outside departments; and promote innovative pedagogical practices e.g., micro-crediting and digital certifications all targeted at specific in-demand roles and skills. This can be facilitated by the West London Film & TV Skills Hub.
- 3 MetFilm School, MAMA Youth and Film London operate recruitment agencies for the screen industries – more providers should set up recruitment capacity to collaborate more closely with employers. Middlesex University, for example, is currently exploring this option. This can be facilitated by the West London Film & TV Skills Hub.
- 4 Providers must use employer relationships, market intelligence and skills gap information to create provision which addresses screen industry shortage areas, including set designer, sparks (electrician) and prop maker. Some of these might be suitable as transition courses or add-ons to existing provision, for example including optional units in set construction within West London's carpentry and joinery courses. This can be facilitated by the West London Film & TV Skills Hub.
- 5 Providers should ensure elements of screen-relevant soft skills are embedded into courses, drawing on subjects that screen industries employers have indicated as key issues. One example of this is the ScreenSkills/Middlesex University-led 'WYRSE' initiative.
- 6 Additional funding should be sought to ensure academic institutions can effectively train sufficient students for the screen industries' shortages areas. It is hoped that the BFI Skills Cluster for London will help boost training funding in the region.
- 7 The West London Film & TV Skills Hub to continue to facilitate relevant work experience for students to ensure they have relevant experience prior to leaving education.

Acknowledgements

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Appendix

All Screen: 11 institutions/7 levels /116 programmes

Subject	Number of Institutions	Level 1	Level 2	Level 3 (3-6 inc)	Level 5	Levels 4-6	Level 7
Media-related	11	6	8	13	1	7	10
Film Production	4			3		5	2
Film Production +	4			2		3	2
Music for Film/TV	1					1	1
TV/Digital Production	2			1		2	
Film & TV Production	4			2		2	1
Film/TV Theory/Business	2			2		3	1
Animation	4			5		2	
Games	8		2	7	1	6	1
Animation & Games	6		2	4		2	
VFX	4			2		4	
Total	11 Institutions (6 colleges / 5 universities)	6	12	41	2	37	18

All Screen: 11 institutions/7 levels/116 programmes

Institution Subject	BRU	BUCKS NEW	MDX	WESTM	U W L	Barnet & Southgate	West Thames	West London	HCUC	Stanmore	United
Media-related	L4-6 L7	L3-6 L4-6 L7	L3 L4-6 L7	L3 L4-6 x 2 L7 x 5	L3 x 2 L4-6 L7	L2 L1 L3	L1 L2 L5	L1 L2 L3	L2 L3	L1 L2 L3	L1 L2 L3
Film Production	L4-6	L4-6 L3-6 L7	L3-6 L4-6	L4-6							
Film Production +	L4-6	L7	L3-6 L4-6		L3 L4-6 L7						
Music for Film/TV					L4-6 L7						
TV/Digital Production			L3-6 L4-6	L4-6							
Film & TV Production	L4-6	L3-6 L4-6								L3	
Film/TV Theory/Business	L4-6			L7	L3 L4-6						
Animation		L3-6 L4-6 L7	L3-6 L4-6	L3-6		L3					
Games	L4-6 x 2 L7	L3 L3-6 L4-6 L7	L3-6 L4-6		L3-6 L4-6	L3	L3	L2	L2 L3 L4 L5	L3	L3
Animation & Games			L3-6 L4-6		L3-6 L4-6	L2	L3		L2	L3	
VFX	L4-6	L3-6 L4-6	L3-6 L4-6		L3 L4-6				L2		