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Centre stage

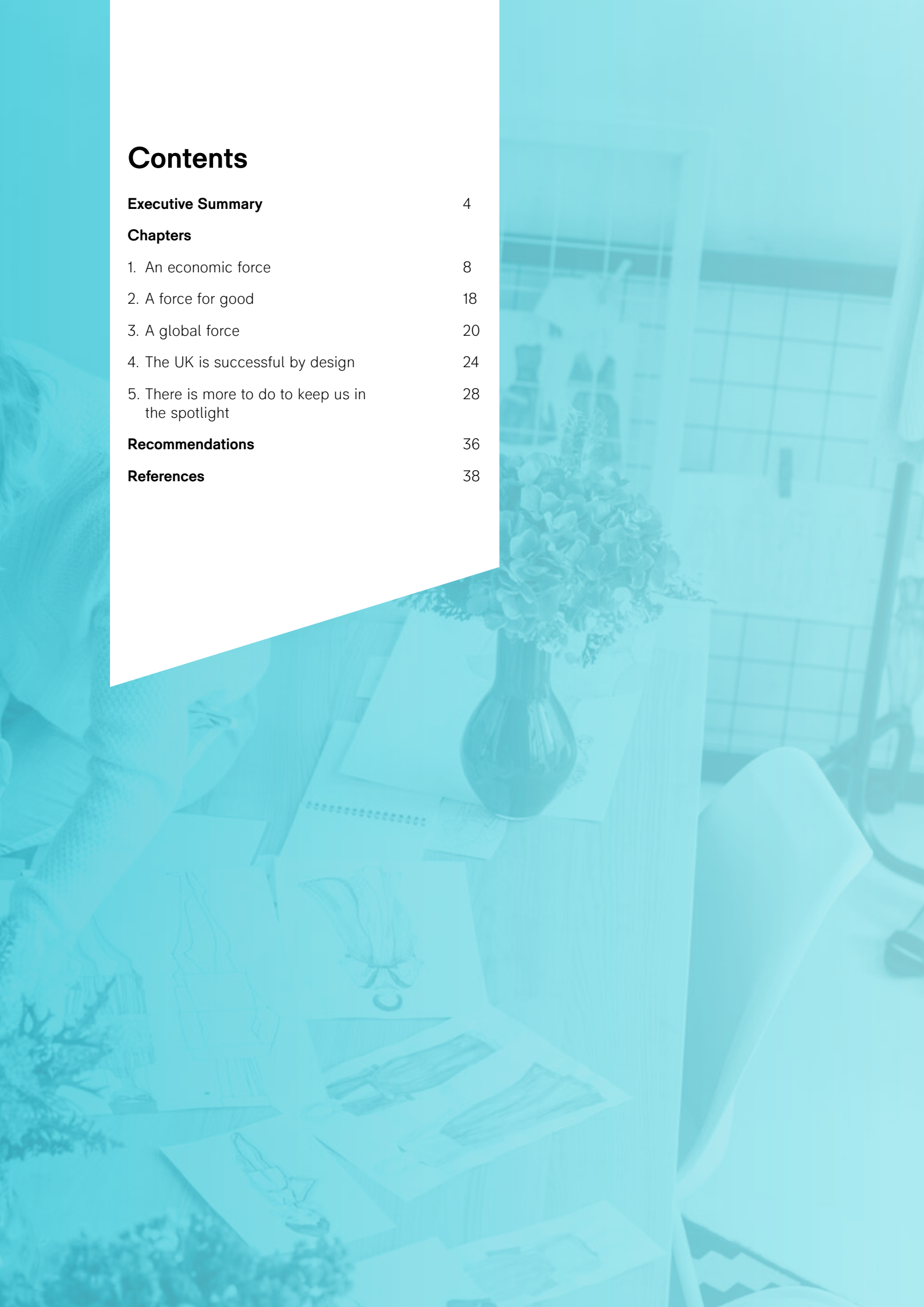
Keeping the UK's creative industries in the spotlight

October 2019
Innovation



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Executive Summary

The UK is defined by its creativity. It is one of the country's biggest strengths, intrinsic to our national identity and what we are best known for on the international stage. UK creativity is consumed around the world as our creative industries lead the way in music, architecture, television, film, gaming, fashion, publishing, art and culture, design, craft, advertising and createch. They are truly a global success story, both in terms of their economic and cultural value.

The UK creative industries punch above their weight and their economic contribution is extraordinary. They have grown twice as fast as the economy as a whole since 2010 and contributed £101.5bn to the UK economy in 2017. The sector employs over two million people and benefits communities across all regions and nations of the UK. It is estimated they could deliver close to £130bn GVA by 2025.¹ The creative industries also sit at the heart of a bigger creative economy, generating value across the supply chain and boosting employment in creative jobs outside of the sector. Yet there is a sense in industry that the UK does not always celebrate its creative achievements enough. The Creative Industries Sector Deal, agreed between the government and industry under the leadership of the Creative Industries Council (CIC) marked a big step forward. This investment and commitment to the sector seeks to unlock growth for creative businesses, creating jobs and sharing prosperity across the UK. Good progress has been made to date, but the sector still faces many challenges. The government has the opportunity to build on this work, harnessing the huge potential of this world-beating sector and strengthening its economic success.

The creative industries are driving innovation faster than other area of the economy. The launch of the Creative Industries Clusters Programme, under the Creative Industries Sector Deal, seeks to strengthen creative clusters around the country. This significant investment fosters collaboration between business and leading universities to stimulate R&D innovation in creative regional hubs.

Cultural and creative heritage is a force for good woven into the fabric of our society. The creative industries remind us of our history, reflect who we are and influence our behaviours. They educate, inform and inspire. They have the power to unite communities and improve our quality of life. They are place makers, playing a significant role in regeneration and job creation around the UK. Perhaps most importantly we enjoy them, and they make us happy.

International demand for British creativity and culture continues to grow. There is enormous potential to increase creative exports to consolidate the position of the UK's creative industries as a world leader, and to leverage the wider trade benefits to UK soft power. A coordinated industry-led international trade strategy, which profiles creative businesses of all sizes and leverages the influence of cultural UK institutions will further Britain's interests around the world.

The UK's success is a result of conscious interventions over a long period of time. A heritage of creativity, a highly skilled workforce, a good policy framework and an entrepreneurial attitude have propelled the UK forward.

But now is the time to double down. These are unprecedented times. The Brexit debate continues and the UK must renegotiate its place in the world, deciding what it wants to be known for internationally. The creative industries are exposed to digital disruption and increasing competition as international players seek to emulate and surpass Britain's success. In addition, there are domestic challenges to address as some domestic policy areas have failed to meet the needs of the sector.

At this pivotal time, the creative industries provide an exciting opportunity for Britain to reposition itself and tell its story. The sector showcases the wide range of highly innovative and quality creative goods and services the UK has to offer. Through continued government-business collaboration and appropriate policy making the UK's creative industries will be internationally competitive and regional and national economic growth can be maximised.



The creative industries in numbers



Advertising



Architecture



Arts & culture



Craft



Createch



Design



Fashion



Games



Music



Publishing



TV & Film

Gross Value Added (GVA)

£101.5bn

The creative industries generate over **£100 billion** for the UK economy

£11.5m

Equivalent to **£11.5m** per hour

2x

Growing twice as fast as the economy as a whole

Exports

£50bn

Exports of creative goods and services are worth **£50 billion** to the UK economy

18%

18% of businesses in the sector have traded internationally

50%

By 2023 the sector aims to increase exports by **50%**

Employment

3,170,000

Over **3 million** people are employed across the creative industries and wider creative economy

30%

Employment in the creative industries has increased by **30%** since 2011

87%

87% of jobs in the creative industries are at low or no risk of automation

Business Creation

284,400

There are **284,400** businesses in the creative industries

11.8%

The creative industries account for **1 in 8** UK businesses

95%

Are micro-businesses with less than 10 employees



An economic force

The UK's creative industries are world leading. From music where British artists account for one in eight² albums sold around the world; to film with Olivia Coleman winning Best Actress at the Oscars; to TV with Downton Abbey being distributed in over 250 territories worldwide; to cultural institutions, fashion, immersive technologies, design or publishing these sectors are thriving. British creativity is in high demand.

Creative industries are the architects of growth across the UK

A record contribution to the UK economy

The creative industries are an economic heavyweight fuelling growth across the country. They are the fastest growing UK sector having grown twice as fast as the economy as a whole since 2010. In 2017, the sector broke the £100 billion ceiling, generating £101.5bn³ GVA for the economy – more than oil and gas, life sciences, automotive and aerospace combined – or the equivalent of £11.5m per hour. The indirect value of the creative industries is also substantial. The sector is an enabler of the wider economy stimulating business across other industries and driving value through its supply chain.

There is significant global demand for UK creativity

The value of creative exports reached £50bn in 2017 signalling strong international demand for UK creativity. Fundamental to this export success is the UK's trusted business environment and a recognition of British quality. Year on year export growth was recorded in architecture, IT software and computing, design, designer fashion, advertising, marketing, music and crafts. The creative industries are digitally advanced and well positioned to further increase their share of global trade in today's digital age. In June 2019, the CIC's UK Creative Industries Trade and Investment Board (CITIB) launched a new export strategy. It pledged to increase creative exports by 50% by 2023⁴ and to increase the number of creative businesses exporting, with a focus on helping small businesses.



Employment growth out paces the rest of the UK

The creative industries are at the heart of a bigger creative economy which has boosted employment in the UK workforce. Since 2011 the rate of employment in the creative industries has grown by 30%⁵ - three times the national average - to over 2 million jobs. In addition, over 1 million people are employed in creative roles outside the creative industries. This growth in employment shows no sign of slowing down. Demand for creative jobs is estimated to increase by 30%–40% by 2030.⁶ Research by Nesta⁷ found that creative industries jobs are comparatively more resilient to automation than jobs in non-creative industries. As we move ever further into the fourth industrial revolution and the economy becomes more technologically advanced, the UK's ability to produce and sustain creative jobs will be key.

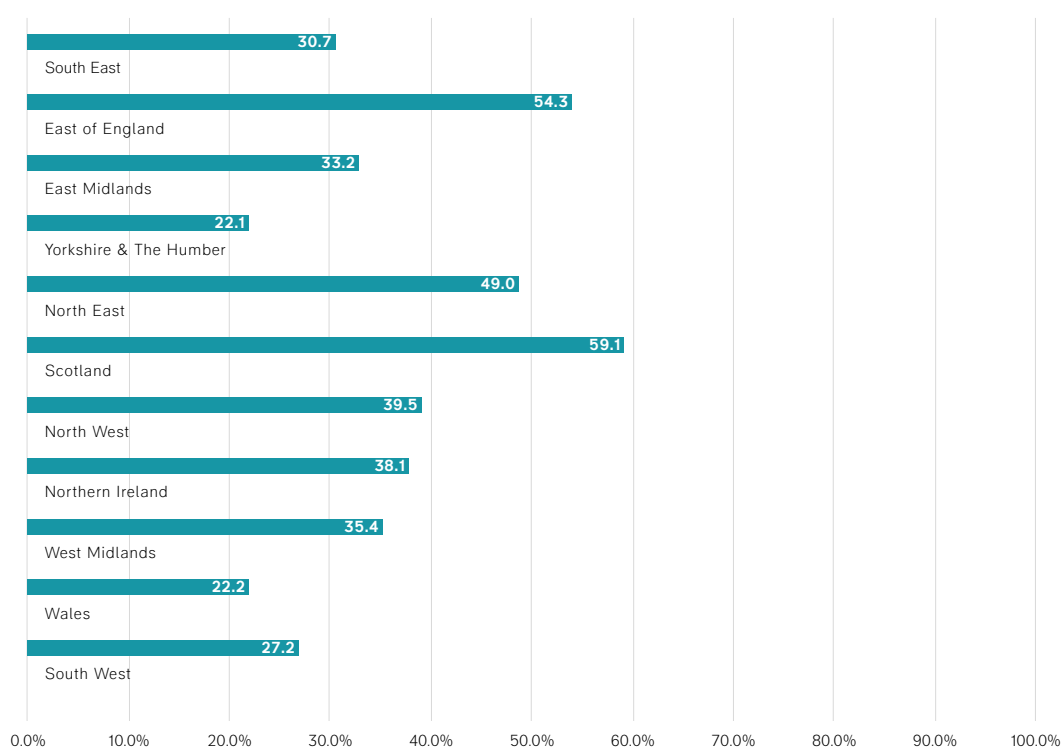
There is huge opportunity for businesses to scale up

Approximately 1 in 8 UK businesses are in the creative industries. While large well-known brands tend to dominate, the ecology of the creative sector is much more varied. The sector has a high proportion of freelancers and SMEs. Almost 95%⁸ of creative businesses are micro businesses with less than 10 employees. The pace at which creative entrepreneurs are establishing new businesses is rapid and outweighs other areas of the economy. Between 2008–2014 the number of SMEs in the creative sector rose by 25%,⁹ compared to manufacturing, where there was a rise of just 2% for the same period. These creative SMEs are at the forefront of innovation, design and creativity. With the right support they could help to address the UK's productivity challenge.

Creative industries contribute to the prosperity of all regions and nations across the UK

Expansion of this strong and vibrant sector outside of London has accelerated over recent years, leading to the development of dynamic creative hubs throughout the country. These hubs of creativity are drivers of local economic health, creating jobs and encouraging business collaboration. Since 2010 the creative industries have grown in every region of the UK.

Creative Industries GVA growth (%) 2010 - 2017 by region



Source: DCMS Sectors Economic Estimates 2017: Regional Gross Value Added (GVA)



**£1.4bn
GVA**

Manchester

According to the Institute for Public Policy Research (IPPR) Manchester is the second largest creative city in Europe after London. Manchester's creative sector is thriving, employing over 48,000¹⁰ people across design, film and TV, publishing and architecture.

It is famous for its star-studded musical heritage; for world leading animation and broadcasting and media production. MediaCityUK is home to more than 250 digital and media businesses fostering a community of collaboration and growth.



**£4.4bn
GVA**

Scotland

Scotland has a long established creative sector. Strong regional identities have helped to create micro-economies across the country via certain industries, brands, designs and stories. Scotland is known for excellence in its arts school and is home to international leaders in gaming and digital technology platforms.

- The Edinburgh Festival Fringe is the largest arts festival in the world. It is estimated to be worth £1bn¹¹ to Scotland's economy, with half generated in direct spend and the other half through a halo effect of additional spending. Edinburgh also majors on data driven innovation with a focus on creative informatics.
- Dundee has a history rooted in technology and gaming. Minecraft and Grand Theft Auto, two of the most played games in the world, were created in Dundee. 2018 saw the opening of the V&A Dundee, Scotland's first design museum. This new cultural centre has been a big success. In its first year the V&A welcomed more than 830,000 visitors and had an economic impact of £23m across Scotland.¹²
- Glasgow, famous for its arts schools has a hegemony of design. The constant flow of new creative graduates stimulates all aspects of design work.



**£1.0bn
GVA**

Northern Ireland

Northern Ireland is home to a dynamic hub of animation and gaming companies. It also has a thriving screen sector with world class facilities and a highly skilled talent pool. Having gained prominence as the filming location of HBO's Game of Thrones®, Northern Ireland has evolved into a world leader in TV and film production. The HBO series pumped £250m¹³ into the country and has helped to increase Northern Ireland's international appeal. To date, £30m in related tourism has been generated as fans of the series flock to visit their favourite filming locations.



**£1.1bn
GVA**

Wales

The creative industries are one of the fastest growing sectors in Wales changing the narrative of a country founded on coal and steel. In Cardiff, the creative industries employ more people than the legal, accountancy and consultancy services combined.¹⁴

Cardiff is a major centre for TV drama. It is where Sherlock was invented and it is home to the filming and production of Doctor Who. Outside of the major titles and broadcasters most of the creative sector in Cardiff is made up of SMEs. Creative Cardiff is a network of over 2700 member businesses. It seeks to support small businesses by bringing this fragmented ecosystem together. By providing resource and expertise Creative Cardiff gives these businesses the time and space to innovate and grow.

"The UK creative industries have proven themselves to be a global success story, accounting for two million jobs, £101.5bn of Gross Value Added to the UK economy and are growing twice as fast as the UK economy.

The industry members of the Creative Industry Council are keen to maintain the momentum of this success. We believe the delivery of the Sector Deal in collaboration with Government will be vital in driving growth across our vibrant and varied industries and the whole country."

Tim Davie, Co-Chair of the Creative Industries Council and Chief Executive Officer of BBC Studios

Click on the interactive map below to see some of the great work of the creative industries across the UK.



Regional development has been strengthened by a number of place-based initiatives established under the sector deal. One example is the CIC's Creative Industries Clusters Programme, an initiative funded (£39m rising to £80m through match funding from universities and the private sector) by the Industrial Strategy and delivered by the Arts and Humanities Research Council. Underpinned by R&D partnerships between universities and industry, the programme will strengthen the creative sector across nine regional clusters.

"A hugely diverse industry that will continue to thrive beyond the digital automation revolution; an industry made up of high value and highly cherished jobs; an industry that with careful regulation and support can prosper in Cardiff, Leeds and Belfast as well as London; and an industry that defines the positive popular perception of this place right across the world. That is an industry worth cherishing and supporting. It is hugely encouraging that the CBI sees this unique value proposition and wishes to speak up for the sector's long-term growth."

Richard Williams, Chief Executive, Northern Ireland Screen

The creative industries are driving innovation

The launch of the Creative Industries Clusters Programme has been welcomed by industry. The partnerships between business and leading universities are stimulating R&D, driving innovation and developing new products in creative hubs around the UK.

Innovation is synonymous with creativity. Originating new ideas, discovering new ways of doing things and looking to solve some of society's biggest challenges.

The sector's ambition to innovate has been a driver of its economic growth. The sector continues to innovate faster than the rest of the economy.¹⁵ Businesses of all sizes are digitally transforming, embracing new technologies and innovating at pace to seize new opportunities.

With the importance of emerging technologies such as 5G and AI, investment and support around R&D plays a key role in encouraging growth and innovation in the creative industries. The UK is a global leader in the creative industries, however to remain at the forefront, mechanisms must be in place to give the UK's competitive start-up ecosystem the support and investment it requires to create and improve products and services.

There are countless examples of innovation across the sector



Architects are responding to emerging generational trends to pioneer energy efficient buildings and sustainable designs for a more environmentally conscious consumer.



In the screen industries immersive technologies are changing how we experience the world around us and challenging industry to think about audiences of the future. A consortium of British companies, led by Aardman, are developing an ambitious new storytelling platform for immersive location-based, multi-user augmented reality experiences. In healthcare, trials are being carried out where women in labour are given virtual reality headsets to help manage the pain of childbirth. The UK's virtual reality industry is predicted to reach £801m¹⁶ in value by 2021, growing faster than any other media and entertainment industry by 2021.



By creating a digital-physical link between goods and their digital identities Blockchain solutions are providing greater transparency in fashion supply chains and inventory management. Augmented reality is enhancing the online shopping experience, allowing shoppers to try items on virtually using a personalised avatar.



The UK is the largest online advertising market in the world with online advertisers spending £13.4bn¹⁷ in 2018. The ad-tech sector, which produces digital tools and services for the advertising industry, comprises more than 300 UK-headquartered companies, with over £1bn invested in this sphere since 2013.



Innovation and vibrancy are demonstrated in the games industry with 68% of the 2,280 UK games companies founded after 2010.¹⁸



Exponential tech growth in the UK has fuelled growth in createch, creativity led tech businesses. In the last 10 years the UK has produced 72 tech unicorns (companies valued at more than \$1bn)¹⁹ and London is recognised as the leading tech centre of Europe.



In music the independent sector is exploding, accounting for 25% of the sector. This is where we see a lot of innovation and inventiveness. For example, Bjork, who is signed to British independent label One Little Indian, led the way in providing virtual reality and AI with cultural relevance in her 2018 multi-format 'Vulnicura'.

"The British independent music community is the beating heart of innovation, connecting the white heat of contemporary cultural movements with cutting edge digital technology and creative output, projecting the essence of contemporary Britain both at home and abroad.

Community in this case is a carefully chosen word that describes the genuinely collaborative atmosphere of mutual support and knowledge transfer that occurs between businesses in this sector.

Success in British independent music ranges from cool underground niches like Grime, Jazz and Dance Music to the mainstream success of artists such as Adele, The Arctic Monkeys and more recently AJ Tracey.

However, these world-beating creative entrepreneurs suffer from a distorted perception of risk and a lack of genuine economic analysis. This historic cultural stigma isolates them from mainstream sources of capital and many other business levers required to scale.

It is urgent that we act now to take this powerful, but largely untapped force in our economic landscape seriously. With the right support we can unlock the incredible potential that these entrepreneurs are poised to realise for brand Britain, the economy and our culture."

Paul Pacifico, Chief Executive Officer, The Association of Independent Music (AIM)

"The creative industries have finally been recognised for what they are – a central pillar of the UK economy which continues to grow in these challenging times. That achievement largely rests on the skills and talent of the people who work in them. The creative education that they have accessed through schools, colleges and universities and into the work place has been key to delivering our success.

Creativity is also recognised as core to powering the economy as a whole as the 4th industrial revolution unfolds and to supporting the nation's sense of itself and wellbeing.

We must double down now to make sure that what creative education delivers is of high quality and is recognised, respected and resourced appropriately."

Dinah Caine CBE, Creative Industries Council – Chair, Education & Skills and Chair of Council, Goldsmiths University of London



"The UK's creative industries are something we can all feel proud of – they drive economic growth here at home and are admired the world over, making a major contribution to the UK's international reputation.

At the Barbican, our ambitious arts and learning programme reaches audiences from across the UK and around the world. Every year we bring thousands of international artists to London to present work that breaks down barriers, and we produce, curate and commission dynamic new exhibitions and productions that tour to hundreds of thousands of people across the globe. However, the bottom line is not the only place where our creative industries have a positive impact; they make a vast difference to people's skills development and wellbeing too.

Our pioneering Creative Learning department has supported more than 100,000 people of all ages and backgrounds to access and engage with the arts. At a time where there is a concerning decline in arts subject take-up in schools, many of our programmes help children and young people access arts education opportunities. These range from Barbican Box, which supports pupils and their teachers to create high-quality theatre, music or visual arts to talent development programmes that provide young people with creative skills for life.

We are grateful to the CBI for shining a spotlight on the challenges faced by the UK's creative industries at such a pivotal time."

Sir Nicholas Kenyon, Managing Director, Barbican

A force for good

The impact of the creative industries cannot solely be measured economically. They are much more than that. The UK's mix of creative businesses and cultural institutions play a positive role in society and local communities. The creative industries express human imagination and help shape our national character. They reflect who we are, and what it means to be British. They can cut through social differences and bring communities together. Whether it's through celebrating cultural events or through the country's favourite TV shows, the creative industries have the power to unite.

The arts, creativity and cultural institutions are intrinsic to the UK's DNA...

The creative, arts and cultural sectors are woven into the fabric of our society. They provide engaging and social experiences, tell the stories of the past and help us make sense of the world. They enable us to learn about our culture and identity and to develop an understanding of societal issues. The creative industries define trends and generations. We are a by-product of the cultural environment shaping our habits and behaviours. Museums, libraries and community arts are open to everyone. They offer a shared space to explore, celebrate and debate. The unifying aspects of the creative and cultural sectors become increasingly important during these times of national division. Cultural events have the power to bring people together. In 2018 millions of people came together to celebrate the royal wedding. It was the most viewed event of the year on television averaging 12 million²⁰ viewers at any one time.



It is important that British audiences get access to content made for them. The creative sector promotes democracy through robust, trusted, high quality news. A free and independent media heavily depends on advertisement revenues to finance its quality content. UK news is the most trusted in the world and local, national and international coverage ensures everybody is informed or able to educate themselves on the matters most important to them. The role of Public Service Broadcasting is central to supporting news plurality with services that must be accurate and impartial. A trusted news service is vital to counter misinformation and 'fake news'.

...are good for our wellbeing...

It is well documented that the creative industries have a positive impact on our quality of life. Exposure to the arts and creativity is stimulating, enriches lives and is good for our wellbeing. They help create a sense of community and belonging. They combat loneliness, help to improve educational attainment and moreover we enjoy them. There are 2500 museums and galleries in the UK and approximately 600 have community programmes targeting health and wellbeing. Research by the Arts Council England (ACE)²¹ found that 75% of people aged 65+ years old say that arts and culture are important to making them feel happy. In addition, 69% said that arts and culture help to improve the quality of their life.

A ground-breaking research partnership between Alzheimer's Research UK, University College London (UCL), the University of East Anglia, London game developers Glitchers and Deutsche Telekom developed Hero Quest, a mobile game that can be used to determine whether players have an elevated risk of developing Alzheimer's. This in turn assists Alzheimer's treatment and research around it.

TV programming and advertising can also drive positive social change. For example the BBC's Blue Planet II and Sky's Ocean Rescue mobilised huge numbers of people to reduce their usage of single-use plastic. ITV's Eat Them to Defeat Them campaign encouraged children to eat more vegetables to combat rising obesity levels.

...and act as place makers

The creative sector has proven itself as a place maker. Creative and cultural organisations can bring people together and demonstrate the history of a place. They play a central role in regenerating post-industrial towns and in alleviating poverty across the country. They can rebrand an area, offset some of the effects of the weakening high street and help instil a sense of pride in a community. Through clever design, the repurposing of an old or disused building can lead to a community space such as a new library or theatre being a catalyst for change in the local area. This can attract investment from new businesses, creating jobs and attracting people to live and socialise in a place that has been revived.

The seaside town of Margate has pursued a creative-led regeneration strategy over the last 10 years, promoting Dreamland and the Turner Contemporary. Between 2013 – 2016 the number of creative businesses increased by 84%.²² In 2018, 35%²³ of visitors to the town visited specifically for the Turner Contemporary. This focus on cultural assets has attracted record numbers of people to visit and live in the town.

A global force

The UK has a long, established history of being the creative and cultural centre of the world. The Victorians led the way with the Great Exhibition of 1851, providing a platform to showcase the best of British art, design and industry alongside marvels from over 45 countries around the world. This international exhibition showed the UK to be a global metropolis and was a phenomenal success. It ran for 6 months in London, exhibited over 6500 international objects, attracted over 6 million visitors and generated over £186,000 profit (over £16m in today's terms).²⁴ This profit, was in part, used to fund the Natural History Museum, the Victoria and Albert Museum, the Science Museum and Britain's early design and arts colleges - cementing a 168-year legacy that continues to provide enjoyment and education to millions of people each year.

The UK's creative industries play an integral role in shaping Brand Britain on the world stage. They are the fastest growing part of the UK economy and have developed into a successful, world beating global hub with a highly skilled creative workforce. The sector really does punch above its weight internationally. Its accomplishments far outweigh the UK's size. Arguably the US, the world's largest economy, is the UK's only global peer despite being five times the size of the UK.

Demand for British creativity, culture and content continues to grow, as evidenced by Portland's 2018 Soft Power 30 Index²⁵ ranking the UK number one in the world for cultural influence.

"The UK's creative industries punch well above their weight on the global stage. Our creative talent is respected the world over - whether it's our actors, musicians, writers, artists, designers, curators, directors, producers or technicians. But the need to invest in the UK's creative future is just as important for our science, tech, engineering, service and manufacturing sectors. Increasingly, we hear from employers across all industries that they place a high value on creative skills in their workforce. Now, more than ever, is the time to invest in creativity as much as numeracy and literacy in our education system, to equip the next generation with the skills they need to invent tomorrow."

Dr Darren Henley OBE, Chief Executive, Arts Council England

British creativity is in high demand around the world

British creativity is the UK's calling card to the world. Shakespeare, Jane Austen, Harry Potter, the Premier League, Dr Who and Wallace & Gromit, to name a few, are loved the world over. There are many more examples of UK creative content leading the way:



The UK is per capita the best music industry in the world and after the US, is the second biggest exporter of music.²⁶ The biggest selling artist globally in 2017 was Ed Sheeran.²⁷ Adele, an alumni of the BRIT School, is one of the biggest selling female artists of all time. International demand for UK Grime has been propelled into the mainstream by artists such as Skepta and Stormzy.



British created TV shows Fleabag, Killing Eve, Black Mirror and Chernobyl swept up awards at the 2019 Emmys. TV formats for hit UK shows, including Love Island, Gogglebox, Top Gear and Strictly Come Dancing are being licensed and remade around the world. Revenues for Britain's independent TV production sector exceeded £3bn²⁸ in 2019 with international revenue growing to £962m, an increase of over 90% since 2013.



Accounting for 10%²⁹ global market share, the UK is a global leader in academic publishing. Particularly strong in life sciences, medical journals, such as 'The Lancet' harness the scientific strengths of UK universities and leading academics to research and address global public health issues.



The Guardian, a global digital news brand, is an export success story with two thirds of its web traffic coming from outside of the UK.



London fashion week (LFW) has cemented its place alongside New York, Paris and Milan. LFW is a spectacular display of British design and attracts thousands of visitors each year. The showcase is key to an industry worth £21bn³⁰ to the economy. LFW is also pioneering. Burberry was quick to digitalise its shows, becoming the first brand to broadcast its catwalk show live in 3D across social media in 2010. It was also the first to sell its collection straight from the catwalk in 2014 through Twitter. In addition, the September 2018 LFW was the first major show to go 100% fur free, inspiring a global movement.



The UK has produced 28 winners of The Booker Prize for Fiction - the top literary award in the English language – over its 50-year history.



The UK games industry is a global leader with over 2,280 active games companies in the UK. Worldwide franchises such as Tomb Raider, Forza Horizon, Overcooked and Football Manager were created on these shores and sell massively around the globe.



Looking to media and advertising, the UK win more Cannes Lions awards than any other European country and more than anywhere else in the world on a per capita basis – numbering 1,500³¹ since 2005.

Leveraging the soft power of the creative industries generates international trade benefits

A country's cultural ranking matters. Portland's 2018 Soft Power Index ranked the UK number one in the world, with strengths in culture, education and digital scoring highly. UK culture is enjoyed around the world through our creative industries, harnessing Britain's soft power and projecting the nation's story across borders. The creative industries have enormous potential to consolidate their position as a global leader and further Britain's international influence and long-term interests. With the right government support the wider benefits to UK soft power and economic growth can be maximised.

Some of the best of what the UK has to offer has been showcased through the GREAT Britain campaign, the government's most successful international promotional campaign, which aims to encourage people to visit, do business, invest and study in the UK. The campaign has been an incredible display of national branding and has the potential to be worth £2.1bn³² within five years.

As the UK charts a new course in its global relationships, linking the creative sector to burgeoning markets and leveraging the trade benefits of the creative industries' soft power will be vital. Maximising the power of our creative brands will help Britain to navigate political and competitive challenges and to future-proof the UK's position in the world.

The UK must take the opportunity to build on the international reputation of cultural institutions and creative businesses

Britain has a distinctive blend of established creative businesses, cultural institutions, a respected regulatory framework, world leading universities and successful creative entrepreneurs. This ecology is critical to delivering our international creative edge.

Britain's institutions hold substantial international cultural diplomacy and soft power. Take for example, the UK's advertising industry's self-and co-regulatory system. It has been around for more than 50 years and is seen as the gold standard worldwide. Independent institutions like the BBC World Service and the British Council play a leading role in promoting the UK's image overseas. The British Library is the largest national library in the world, holding a multilingual international collection as a result of British history. It chairs the Conference of European National Librarians, which works with a community of 48 national libraries across 45 countries.

The UK has six of the top 20 most visited museums in the world (equal to the US). Seven of the top ten visitor attractions in the UK are museums and galleries. The Victoria and Albert museum is the world's leading museum of performance, art and design. The Barbican is an international arts and learning centre, renowned for pushing the boundaries and one of the UK's best examples of Brutalist architecture. These prestigious institutions hold significant cultural power and influence.

"The British luxury sector is worth £48 billion to the UK economy with around 80% of what it creates destined for export. The global desirability of brands such as Bentley, Burberry, Fortnum & Mason, Glenmorangie, Harrods, Mulberry or Wedgwood have enormous ambassadorial and soft power influence for the UK and each of these brands' products says something profound about the creativity, entrepreneurship and craftsmanship of Brand Britain and its high-end creative and cultural industries. Not only do the high-end creative and cultural industries make Britain famous on a global scale, they create a positive spill-over effect for the travel and tourism sectors through the international appeal of luxury brands, hotels, restaurants and cultural experiences all of which are highly influential in attracting visitors to the UK. In 2017 the value of sales of high-end goods to non-UK resident customers reached £4.5 billion, with the UK specifically attracting visitors who come to Britain to buy British."

Helen Brocklebank, Chief Executive Officer, The Walpole

The UK is successful by design

The world leading achievements of the UK's creative industries are no accident. The UK has a heritage of creativity, a good policy framework in place to help support that, and the entrepreneurial attitude to embrace those opportunities.

A heritage of creativity

- **Broadcasting is integral to the UK creative industries:** The UK television industry is a global success story. With an annual turnover of £14bn, it is the biggest in the world, outside the US, and a leading exporter of TV content. In 2016/17 international TV programme sales reached £902m³³ through exporting high quality natural history, entertainment shows, documentaries, high-end drama, factual and reality formats all around the world. Britain's success is driven by an effective mixed ecology of public and commercial broadcasters, all investing in high quality original content and providing creative competition, innovation and audience choice.

UK Public Service Broadcasting (PSB) is at the heart of this. The UK PSB framework is unique. It recognises the value of the broadcasters' public service remit to ensure everybody has access to high quality television that informs, educates, unifies and reflects society. PSBs are the biggest investors in British programming spending £2.8bn³⁴ on new UK content in 2018. They have also expanded industry employment across the UK by moving some operations out of London.

Alongside PSBs, commercial broadcasters also play an important role. They invest £1.1bn³⁵ a year in UK content, the vast majority are in new programmes. They are one of the fastest growing sources of investment for UK content, having increased spend by 70% since 2011. This additional investment provides opportunities for producers to win commissions and offers audiences greater choice. The commercial sector is also a major employer having doubled the number of staff it accounts for over the last decade to 12,000.

High levels of inward investment in UK-based film and TV production are a reflection of the UK's creative and technical strengths.

- **A hotbed of creative talent:** The UK is a top destination for global talent. Our world class education system, outward looking world leading universities and cutting-edge research capabilities attract thousands to study in the UK each year. London has the largest proportion of people with university degrees of any large city in the world. Creative arts educational establishments, including the Royal Academy of Dramatic Art, the BRIT School, Glasgow School of Art, Central Saint Martins, Goldsmiths, University of London and Ravensbourne University, to name a few, are known around the world. The vast employment opportunities in the creative industries and wider creative economy attract skilled professionals to live and work here. This vibrant, multicultural mix of highly skilled global talent has propelled the UK forward to the top spot.

"The UK creative industries are clearly vital culturally, but their economic potential is less recognised. This is a high growth sector that the UK is brilliant at and which, if we get the foundations right, will provide rewarding jobs not just today, but for our children."

Adam Minns, Executive Director, Commercial Broadcasters Association (COBA)





A good policy framework

- **Effective policymaking:** The significance of the Creative Industries Sector Deal under the Industrial Strategy cannot be underestimated. Sir Peter Bazaglette's 2017³⁶ independent review of the sector indicated a degree of awareness and recognition which had long been missed. The review was a watershed moment highlighting the importance of the creative industries and recognising that the UK punches above its weight on the global stage. The creation of the Creative Industries Council (CIC) and increased financial investment in the sector has been well received by industry. But there is still work to do to address challenges domestically, as well as the need to navigate Brexit.
- **Public investment drives commercial value:** The arts and culture sector contributes more than £10.8bn³⁷ GVA to the UK economy. Investment in our public sector arts and culture is incredibly important as it ensures arts and culture are open to everyone.
- **Game changing Screen Sector Tax Reliefs:** The success of the UK's screen sectors (TV, film, animation and gaming) is a huge economic asset. The BFI's 2018 Screen Business report demonstrates the huge value of the screen sector tax reliefs delivering almost £8bn³⁸ to the economy. The creative tax relief programme must be maintained. They have enabled the animation sector in Northern Ireland to flourish and attracted investment from international studios in UK filming and production. Netflix and Shepperton Studios recently announced a ten year³⁹ partnership, signalling a vote of confidence in the industry.

The flipside to this incredible growth is a squeeze on studio space and skilled crew, meaning the UK risks the ability to meet rising demand. However recent news of Elstree Studios building two new stages for film and high-end television use and dock10's expansion of its high-end production capabilities is positive.

An entrepreneurial attitude

- **Dynamic start-ups:** Small businesses are the driving force of UK business. They are the largest group of employers and integral to a thriving economy. The UK is recognised as one of the best places in the world to start and grow a business,⁴⁰ with record numbers of new businesses starting every day. The creative industries inspire the next generation of entrepreneurs, innovating and learning from the stories of those who have created before them.
- **Cultural public centres:** Museums, libraries and universities can inspire new business ideas, provide free working and research facilities and enable entrepreneurs to connect to a network of SMEs. They provide a space for collaboration and knowledge sharing. One interesting example is the British Library's Business & IP (intellectual property) Centre⁴¹ which provides targeted help to aspiring entrepreneurs, early-stage businesses and helps established SMEs to scale. To date over 100,000 entrepreneurs in London have benefited from the support of the Centre, 24% of which were in the Creative, Media and Technology sectors.



There is more to do to keep us in the spotlight

These are unprecedented times and the UK cannot afford to become complacent. The UK is facing a defining moment in its history with its departure from the European Union (EU), scheduled for 31 October 2019. The position of the UK's creative industries on the world stage has never been stronger, yet as we continue to negotiate Brexit almost 80% of businesses in the sector "...are not confident that Britain will maintain its leading global reputation post-Brexit."⁴²

This is against a backdrop of global and macro-economic change as well as increased international competition. The success of the creative industries must not be taken for granted. The government and business must work together to bolster the sector to ensure it maintains its world leading position.

Brexit is causing the UK to reposition

As the Brexit debate continues, the UK must renegotiate its place in the world, deciding what it wants to be known for internationally.

WPP's 2018 Best Countries survey indicated a decline in global confidence in Britain.⁴³ The UK slipped from third to fourth place in the global list of the most attractive places to live and work, signalling a drop-in confidence in the UK's economic strength post-Brexit.

For the creative industries the number one concern is the impact on talent. The sector attracts a highly skilled workforce from around the world. This diverse workforce, alongside domestic talent has been key to the sector's success as diverse multi-cultural teams generate the most creative outputs. The UK has work to do to ensure it is a place people chose to live and work.

A high proportion of the sector's workforce are from the EU. The UK Screen Alliance found that one in three workers in visual effects for TV and film are from Europe.⁴⁴ It is therefore imperative that the UK's post-Brexit immigration strategy does not restrict the sector's ability to recruit and retain talent or to move talent across Europe for touring or short-term projects. Any additional friction, bureaucracy or cost risks damaging the UK's attractiveness.

More broadly, the UK has become a key international hub for creative businesses active across Europe. Government will want to ensure that the attractiveness of investing in a strong UK hub does not fade over time.

Creative Europe funding has been crucial to development in some areas of the sector. Between 2014 and 2020 €89.5m was invested in the UK's creative industries, directly benefiting 376 organisations.⁴⁵ It is not yet clear how in the medium-long term the government intends to replace EU funding after Brexit. But at this pivotal time it is vital funding levels are maintained.

As one of the UK's world class industries, the sector will have a hugely important role to play post-Brexit, with the potential to shape the UK's reputation as both a creative and innovative nation and a key business partner.

Global competition is intensifying

The sector faces growing competition and disruption in today's fast changing global economy.

The UK has long competed with the US and France to be crowned the creative hub of the world. But over recent years new competition has emerged across Europe.

Denmark, specifically Copenhagen, has quickly become a top destination for design and fashion. Within this, demand for all things Scandi, fuelled by millennials and the use of Instagram, has grown exponentially.

Germany's cultural and creative industries generated almost €158bn in 2017⁴⁶ and the German federal government have made several interventions to help the sector compete; including specific support for SMEs and freelancers.

The creative sector in the Netherlands has grown faster than any other sector over recent years leading the Dutch government to prioritise it as a top sector.⁴⁷

It is impossible to discuss the competitive international landscape without recognising the strength of China's buoyant creative economy. Between 2002 – 2015 China was the largest exporter and importer of creative goods and services.⁴⁸ China has been watching the UK's creative industries closely for many years and their sector is becoming increasingly sophisticated. The Chinese are actively exploring how to make the learning experience of children more creative.⁴⁹ The economy can mobilise huge investment in the sector. World leading initiatives are underway, such as the Shanghai International Art City project⁵⁰ and a multi-billion investment programme to build the best creative economy infrastructure in Shanghai by the 22nd century. To compete the UK must think bigger and bolder about the long-term vision for the sector.

"If UK PLC does not look to protect its creative assets, we will become more of a diminished force."

David Pemsel, Chief Executive Officer, Guardian Media Group

It is not only competition from other countries grabbing the attention of creative industries leaders. The extent and speed of the digital revolution has been striking. Undoubtedly, the sector has been empowered by technology to be better. Many areas of the sector have embraced digital technologies to innovate, respond to changing consumer demands and to grow. But challenges do exist.

The expansion of digital platforms has made it harder for the creative industries to control how their content is distributed and to maintain their associated revenue streams. The sector has also experienced online intellectual property (IP) infringement and has issues around IP enforcement. The UK does not intend to transpose the European Copyright Directive post-Brexit but we cannot risk falling behind the EU on copyright protection. The framework in the UK needs to be the best, ensuring content producers can licence on an economic basis.

In an increasingly predatory global context, attention should be paid to ensure longevity and competitiveness of this vitally important sector.

There are domestic challenges to address

The world beating position of our creative industries cannot be taken for granted. Attention must be given to domestic policy areas falling short of meeting the sector's needs.

Getting our education system right has never been more important

Creativity is a bedrock of the UK's identity but industry and educators feel it is undervalued. Creative education inspires young people to explore and to express themselves. It helps build curiosity, persistence and self-confidence.

The current education system does not equip young people with the skills they need for the modern world of work. The fourth industrial revolution will transform the future of work and jobs with high levels of creativity are likely to be more resilient to automation. UK jobs in the creative industries are expected to grow by 5.3%⁵¹ and double the average rate of employment, which will increase by 2.5%. This means 119,495 new jobs for young people by 2024. And yet, there has been a rapid decline in the teaching of creative subjects in schools. Creativity must be considered equally important to numeracy and literacy in all schools.

Currently, there is disparity between the availability of creative subjects in state and private schools. Every person from every background must be given the opportunity to engage in creative education, alongside STEM, digital skills and entrepreneurship, to achieve their potential.

It is equally important that post-18 education fully recognises the value of creative education subjects by looking in the round at wider economic, social and cultural value, rather than a narrow focus on graduate earnings. In the Augur Review, Arts and Humanities subjects were highlighted as being low value due to their earning potential and therefore should command lower levels of investment. Questioning the attractiveness of studying creative subjects threatens the UK's ability to deliver world class education and the ability to meet the needs of the economy in the fourth industrial revolution.

If we do not act now the decline in creative education will continue and will lead to a bigger skills gap in the UK's talent pipeline.

The sector has work to do to improve diversity and inclusion

Industry and government acknowledge they must work together to achieve greater diversity and inclusion (D&I) in the creative industries. It is imperative the creative industries are an accessible career option for everyone regardless of background, and that the sector is an inclusive place to work.

In July 2019, the CIC launched a diversity charter. It commits all creative industries sub-sectors to take action in eight areas designed to promote a diverse workforce, producing diverse outputs for people of all backgrounds.

The diversity charter builds on a range of initiatives and actions across the creative industries, including the BFI's work promoting greater D&I in the UK screens sector. The BFI requires all productions it funds to comply with its Diversity Standards and is working towards their universal adoption across the sector. The Standards require productions to demonstrate how they are actively promoting diversity and inclusion both in front of and behind the camera as well as through skills and training opportunities and reaching out to underserved audiences. The Standards focus on characteristics under the Equality Act 2010 as well as socioeconomic background, participation outside of London and the South East and caring responsibilities. To date they have been adopted by BBC Films and Film4, with Paramount being the first US studio to adopt. The Standards are also an eligibility requirement for BAFTA's British film categories and for all British features competing in any category at the BIFAs.

Greater diversity and inclusion in the creative industries will benefit society and is good for business. A mix of different perspectives generates more creative ideas, leading to better content and a more sustainable sector.

The sector faces skills shortages and risks to the talent pipeline

The changing nature of work and technology is driving huge demand for digital skills. Creative agencies, investment banks and tech firms are increasingly competing in a global race for talent. Research by the CBI found that 95%⁵² of businesses expect their digital skills need to grow. Less than one third of businesses are confident that UK business will be able to access the digital skills they need in the next three to five years.

Creativity is also key when considering the future of work. Jobs in the creative industries will be the most stimulating and most resilient to automation.

Research by the World Economic Forum stated creativity will be one of the top three skills workers will need to thrive in the workplace by 2025,⁵³ signalling the importance of creative skills to the wider economy

Closer collaboration between government and business is needed to nurture skills development and build a sustainable UK skills pipeline.

The apprenticeship levy has been problematic for the sector

The current apprenticeships system is based on traditional models of employment, making it difficult for the creative industries to engage with. The sector has a high proportion of SMEs, micro-businesses and freelancers. In terms of government policy, these kinds of businesses are considered 'a typical' rather than as trailblazing the way in which employment is moving. Few of these businesses and individuals are eligible to recruit apprentices due to their size, short term project-based work and lack of provision.

Those employers paying the apprenticeship levy also encounter issues. Research carried out by ScreenSkills showed that 42%⁵⁴ of levy payers in the creative industries use less than 11% of their levy funds. The apprenticeship levy has demonstrated that a one size fits all approach does not work for the creative industries. The sector has found it difficult to access the levy to deliver quality training. The CBI's report *Learning on the Job: Improving the Apprenticeship Levy*⁵⁵ calls on the government to fulfil its commitment to publicly consult on apprenticeship levy options after 2020.

It looks as though the government is starting to recognise the pressing need for change in the creative industries. In July 2019, following advocacy from the CIC, ScreenSkills supported by government, launched a flexible industry pilot. Aiming to unlock unspent apprenticeship levy funds the pilot will enable the release of funds and the moving of apprentices across employers.

Creative industries SMEs struggle to access funding

The creative sector is viable, stable and growing but individual companies are not always able to scale. The funding landscape (both private and public) can be difficult for start-ups and scale-ups in the sector. These businesses could unlock the UK's potential in emerging technologies such as AI and 5G to ensure the UK remains on top. But often intangible ideas and concepts or the less structured way some creative start-ups operate, mean they can be perceived by investors as high risk.

Mid-sized businesses can also struggle to finance innovation and growth. Businesses must be agile and fit for a digital age. This can be a challenge for a range of creative businesses. For example, those businesses with a strong artisan or hand-crafted heritage rooted in tradition. Or those evolving into an online digital business as retail on the high street weakens. The costs and technical expertise required are vast and many businesses are unable to finance this evolution by themselves.

Creative SMEs and entrepreneurs, particularly those not considered as 'tech' businesses, find that funding, commercial debt and equity finance is difficult to access. It can be onerous, too complicated and jargon in the application process can be confusing. The consequence is that some businesses fund themselves, do less and risk plateauing or failure.

It is not yet clear what the UK's post-Brexit immigration policy will be

Any new post-Brexit immigration system must meet the needs of the sector and ensure it is able to continue to hire workers from the EU; including self-employed and freelance workers. Self-employed and freelance workers play a massive role in the creative industries. They make up 35%⁵⁶ of the overall creative sector and 33% of its EU workers specifically. Self-employed workers account for up to 70% in music and performing arts; 61% in design and designer fashion; and 38% in film, TV, video, radio and photography.

Mobility of workers to and from Europe is also critical for the sector. UK musicians and production crews tour Europe to give live performances and vice-versa. This is a key part of promoting their work and raising revenue. Actors and film crews must be able to easily move between Europe and the UK to shoot on sets in multiple locations. If this mobility was restricted, it would negatively impact UK-based studios. The advertising industry needs to be able to send production crews and agency staff to shoot specific photos in European locations at short notice.

"As one of the UK's fastest growing sectors, responsible for significant, high quality job creation, I welcome the CBI's efforts in championing the further development of the UK's creative industries. Since being founded some 30 years ago by the inspirational Professor Ray Kelvin CBE, Ted Baker has developed into a leading global fashion brand and created some 2000 jobs in the UK. Our experience is that being a UK based creative business is viewed positively in the 50 countries around the world in which we do business, and provides a significant halo effect. There are many further opportunities for the creative sector to continue growing strongly and promoting the UK's influence internationally, both for established businesses and new and emerging ones. Support from the CBI and ultimately the government, will help UK creative industries seize these opportunities and continue to enjoy sustained, successful growth and job creation."

Lindsay Page, Chief Executive Officer, Ted Baker

"The future success of the UK's creative industries starts in our schools, yet creative education in England is in crisis. Music and the arts are central to our culture and to the development of young people but there have continued to be significant cuts in creative education. Having access to the arts stimulates the imagination in young, curious, creative minds and builds cultural knowledge. Production of the arts leads to collaboration – an important attribute in business life. Teaching the arts can transform the lives of young people and help them to express who they really are and what they might become. At The BRIT School for Performing Arts and Technology we incorporate a sense of social, moral and personal responsibility into the culture of the school. We teach today's young citizen to be tomorrow's responsible entrepreneur, polymath, employee or employer."

Stuart Worden, Principal, The BRIT School for Performing Arts and Technology

"It was looking towards an unknown future that created, in 1944, Design Council's forerunner, the Council for Industrial Design, a vision which echoes today as Britain anticipates life outside the European Union. But it's not just the terms of trade or the shape of regulation that create uncertainty: businesses, employees and governing institutions are all asking what the world of business and work will look like in ten, twenty or thirty years time. As the world's first industrial nation, the UK knows that automation brings opportunity and threat, challenges and potential. Despite the uncertainty, there is much agreement that the skills the workforce will need to grasp the opportunities ahead are those most often seen in designers. Without them, our economy will struggle to compete and thrive, with them, we can secure our prosperity.

The pipeline of future innovators is however, at risk of drying up if we don't ensure our schools, colleges and universities provide the right mix of skills. Our ground-breaking research into the value of design, Design Economy 2018 illustrates the regional divides that already exist, and which are likely to grow as poorer towns see lower-skilled jobs disappear to increased automation. We need to invest in design skills, like critical thinking and problem-solving now if we are not to experience more social division, more poverty, and a loss of the higher-wage, more productive jobs that come from design skills and the design sectors."

Sarah Weir OBE, Chief Executive, Design Council



Recommendations

1. The government should harness the valuable economic contribution of the creative industries by ensuring national policies are built with the sector in mind

The unique nature and challenges of the creative industries mean that some national policies do not currently support the needs of the sector. Strong consultation with business, the Creative Industries Council, the Creative Industries Federation and sector forums such as the Prime Minister's Telecoms, Creative, Technology and Media Council is recommended to shape and consult on all national policies.

Areas to consider include:

- **Education and skills** – The provision of creative education in our schools is in decline. Creativity will be one of the top three skills workers will need to thrive in the workplace by 2025. The government, educational institutions and employers must work together to ensure young people leaving education are prepared for the modern world of work. To ensure the whole economy benefits, the government should broaden the EBacc to include a creative subject.

Digital skills are a game-changing lever for competitiveness and business. 95% of CBI members tell us they expect their digital skills needs to grow. The government must ramp up business-government collaboration to build the digital skills pipeline and set an ambitious goal for 100% of the workforce to have basic digital skills by 2025.
- **Apprenticeship Levy** - Research carried out by ScreenSkills showed that 42%⁵⁷ of levy payers in the creative industries use less than 11% of their levy funds. The government should fulfil its commitment to publicly consult on apprenticeship levy options after 2020. It should also set up a task and finish group which brings together treasury, DfE and industry to deep dive into what is needed in the creative industries.
- **Funding landscape for creative businesses** - Driving awareness and understanding amongst creative businesses of all funding and finance options is key. Greater understanding amongst investors on the nature of creative SMEs and the value of these businesses is also crucial. A collaborative approach to understanding the blocks and simplifying the process will unlock value for both sides and deliver sustainable growth across the sector. As will more supportive, innovation packages structured around certain stimulus, such as AI or 5G.
- **Immigration system** - Any new post-Brexit immigration system must meet the needs of the sector and ensure it is able to continue to hire workers from the EU; including self-employed and freelance workers. Mobility of workers to and from Europe is also critical for the sector.

2. The government should take an industry led approach to international trade missions profiling creative businesses of all sizes and all sub-sectors

Government and business must work together to identify opportunities to showcase UK creativity and better coordinate trade delegations by aligning sub sectors in the creative industries to particular international opportunities. For example, being as specific as taking a set of video games developers to a single province in China where there would likely be demand for their products would be much more beneficial than a more loosely organised visit.

CBI members tell us that the quality of assistance provided around the world differs from post to post and best practice needs to be shared. Training for Heads of Mission and Deputy Heads of Mission should also be strengthened to reflect the importance of trade as the UK reshapes its global relationships.

Posts in the most important markets must understand the unique concerns and demands of businesses in the creative industries. Whether that's issues with IP or access to the right infrastructure, there needs to be targeted work to break down market access barriers for one of the UK's most valuable sectors. The creative industries need tailored support to showcase their wide range of highly innovative and quality goods and services.

3. The government and business should work together to take the lead in shaping global online regulation

Modern digital media and telecoms have incredible power that can be felt in ways both good and bad. Through collaboration the government and business have the opportunity to lead the world in shaping regulation of the digital economy.

One area where the UK can set the stage for a strong future is in its approach to economic harm. Economic harm such as copyright infringements and piracy should continue to be a vital focus for government and should be reflected in a joined-up policy approach. The government's sector deal for the creative industries included establishing roundtable discussions to improve action on pirated content – specifically for social media operators, advertising and online retailers. The government committed to concluding these by the end of 2018 and, failing that, to legislate. Notwithstanding the UK's current political uncertainty, the government's overarching suite of digital policy and regulation must retain legislation as a credible future option if the roundtable discussions are to deliver for rights holders.

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