

Creative nation

A guide to the UK's world-leading
creative industries

Withdrawn 22/1/2020

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CREATIVITY IS

GREAT

BRITAIN & NORTHERN IRELAND

UK creativity inspires the world, producing a stream of brilliant individuals and creative teams who are hugely influential in global media, entertainment and the arts.

Building on a rich heritage, the UK's creative leaders, including musicians, film-makers, TV and theatre producers, authors, architects, games developers, fashion designers and publishers, enjoy international acclaim.

Renowned for their innovation and originality, UK creative pioneers and entrepreneurs pride themselves on working in cross-disciplinary collaborative teams, providing business with the creative imagination that drives commercial success.

This brochure showcases the world-leading capabilities of the UK's creative industries, highlighting the winning skills and experience that make them a first-class supplier and partner to markets across the globe.

Detail of the 'funnel',
Western Concourse,
King's Cross Station



Sir John Sorrell

The UK is internationally renowned as an incredibly creative nation that is great to work with.

It has given me great pleasure to watch the UK's creative industries sector evolve and mature over the years. In the last 15 years, in particular, it has become number-one in the world – something that I am immensely proud of.



01

A scene from *War Horse* at the New London Theatre.



Every country across the globe is looking for great creative partners. People want to work with the most creative people, companies want to work with the most creative companies, and cities want to work with cities that have the most creative people in them. That's why the UK is the best-possible creative partner for any other nation worldwide.

Despite their individual specialisms, all of the UK's creative sub-sectors, from advertising, animation and architecture to music, film and publishing, are interlinked and join together to make an immensely powerful team.

Running through them all is design, something that is particularly close to my heart and which is the key engine room of the UK's creative industries. Since we started the London Design Festival in 2003, over 80 cities around the world have started their own versions. That speaks for itself.

There are many secrets to our success. A key factor is the UK's very long-established creative education system, which is the best in the world. This is rooted in the country's system of art schools, of which there are about 100 nationwide. These centres of excellence are the breeding ground for our artists, actors, musicians, computer games and fashion designers, writers and theatre producers - many of whom go on to enjoy international success.

Many students from overseas come to study creative disciplines at UK universities and colleges and then decide to stay on once they have graduated. If you look at the Architectural Association's list of graduates for the last 30 years, for example, it's a roll call of some of the best and most successful architects in the world. They include the likes of the Iraqi-born Zaha Hadid, who set up a practice in London upon graduation and won the industry's prestigious Pritzker Prize in 2004.

02

The UK television industry has an outstanding international reputation, exporting programmes like *Doctor Who* around the world.

03



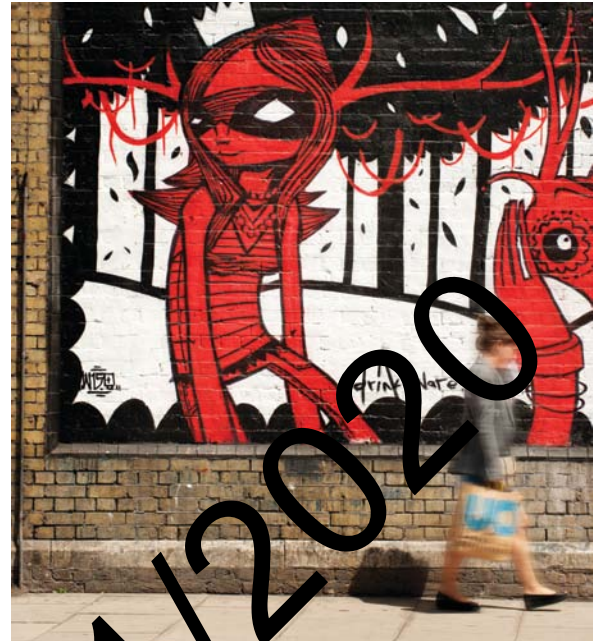
The UK's creative industries pride themselves on their unusually diverse nature. If there were an Olympics for the creative industries, there is no doubt that Britain would come top, because we would win not only a lot of gold medals, but also a lot of silvers and bronzes too. Nobody has the extraordinary range, mix and quality of creative expertise and experience that the UK does.

This is particularly true of London. There are world-class creative companies in all parts of the UK, but London is the gateway to them all. It is a very vibrant and international city, and is widely acknowledged as the creative and design capital of the world. I could probably list, for example, about 50 different design disciplines that are practiced in London at the very highest level, something that is truly unique. Most other major world cities tend to focus on one or just a few individual disciplines.

The cross-disciplinary nature of the UK's creative industries is a major advantage, as it means that you can get people from one creative specialism regularly rubbing shoulders with people from another - which can prove invaluable in the sharing and cross-fertilisation of ideas and create a real buzz.

Another important strength is the international nature of creativity in the UK, due to its cohesive multicultural society and business environment. The country is packed full of creative people from overseas who have set up businesses in the UK because they regard it as being the place to be in terms of creativity, innovation and drive.

Having such a globally minded creative community inevitably makes the UK a more attractive nation to work with in the eyes of overseas buyers and investors.



05

Tech City in East London is fast becoming the digital capital of Europe. It brings together the creativity and energy of the creative industries with that of small fast-growing digital technology companies.

*Strike Suit Zero,
Born Ready Games*



04

The UK has the largest games development sector in Europe, generating £2 billion in global sales each year.

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06

The UK architecture industry enjoys a global reputation for professionalism, integrity, design flair and delivery.

Ikea Development, Wuxi, China, designed by BDP for IICC

“The UK has always had a thirst for new ideas; it is engrained in our character, our national DNA.”

The UK has always had a thirst for new ideas; it is engrained in our character, our national DNA. Because Britain is a small island, we have always sought to be a great trading nation and one that is keen to explore new things and discover new ideas. The secret is then to take these ideas and turn them into something commercially viable and successful – something at which the UK excels.

Perhaps more than any other sector, the UK’s creative industries have the potential to grow considerably over the next five to 10 years.

The London 2012 Olympic and Paralympic Games provided a tremendous springboard for this growth, enabling the world to see the UK in a very exciting and positive way. Not only was the Games a once-in-a-lifetime international showcase for the country’s top-class sporting credentials, it also highlighted the UK’s burgeoning status as a dynamic, world-beating creative hub, helping us create successful international partnerships for the very long term.

Sir John Sorrell
Business Ambassador



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The UK is a world-leading hub for the creative industries

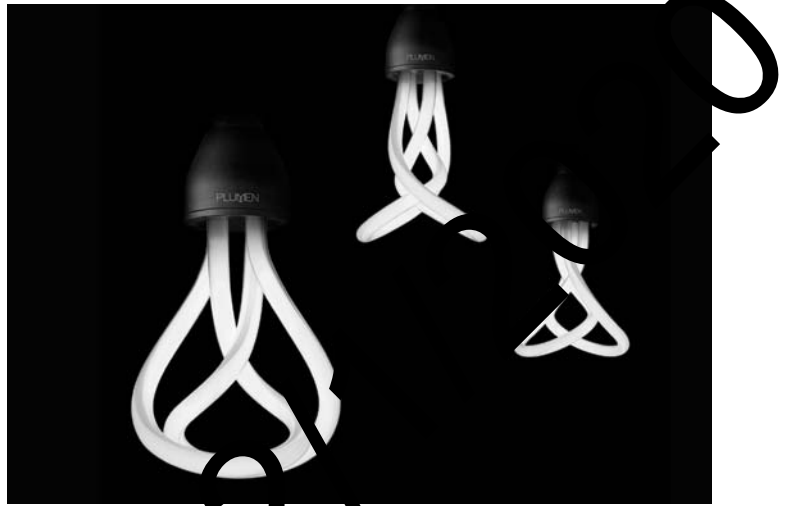
01

The UK has one of the largest creative industries sectors in the world.

02

Billions of pounds-worth of creative products and services are exported by the UK each year.

Plumen light bulb



03

UK creativity has a strong reputation for originality, entrepreneurial flair and effective professional management.



Animated character Sarkoja from *John Carter*, VFX by Double Negative

04

The UK's creative industries are intrinsically international in outlook and influence, drawing on the country's unique cultural diversity.

05

Successful creative clusters are located across the UK, offering world-class expertise and facilities. Hubs include Bath, Brighton, Bristol, Cambridge, Edinburgh, Guildford, London, Manchester, Oxford and Wycombe-Slough, to name just a few.¹



Aeroblades is a modular LED-based urban lighting system, designed by Speirs + Major

06

Approximately 100,000 students graduate annually in the UK in subjects such as architecture, design, music, fashion, digital media,



Ravensbourne College, Design and Communication

07

The UK's creative industries are at the forefront of innovation. Creative firms in almost every UK region are twice as likely to have introduced new products to the market as businesses in other sectors.³



Extrusion Bench 2012

08

Creative businesses in the UK are supported by a robust intellectual property regime and regulatory framework, as well as by internationally renowned trade associations offering professional guidance, training and development.



Nicholas Kirkwood, The Shoe Galleries, Selfridges

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Advertising

The UK's reputation for producing creative and effective business-focused advertising campaigns for international clients is the best in the world. Admired globally for their creativity and entrepreneurialism, UK agencies have produced some of the most recognised and innovative advertisements of recent years and regularly vie with the US for international industry leadership.

The UK is the fifth-largest advertising market in the world.¹

Employing nearly 270,000 people nationwide, the number of advertising agencies in the UK has increased significantly in recent years², and includes many small start-ups and independents. London is a particularly important cluster, with over two-thirds of international advertising agencies basing their European headquarters in the capital³, including world-leading names such as Saatchi & Saatchi, Ogilvy & Mather, Leo Burnett, Lowe, BBH, Mother, M&C Saatchi, WCRS, Abbott Mead Vickers, WPP and TBWA⁴. UK advertising executives are also prominent among the leadership of the US and Asia-Pacific offices of global advertising agencies.

The UK punches well above its weight in the global advertising industry. It is the fifth-largest market for advertising in the world⁵, despite being 22nd in population size⁶, and is consistently in the top two most-awarded countries for creative advertising⁷. Creativity is fuelled by the multicultural nature of the UK, which gives the country's advertising sector a highly diverse pool of ideas to draw upon to create effective global campaigns, suitable for every continent.

As a consequence, advertising is a major source of export revenue for the UK, selling over £2 billion in services overseas each year⁸. In addition, successful advertising helps UK brands to enjoy strong international recognition, enabling the UK to export a much wider range of goods and services.

Forever innovating, UK advertising is among the most advanced in the world, setting the trend in online and non-traditional forms of advertising expenditure and execution. The UK has one of the world's highest levels of broadband penetration, is a global leader in terms of access to digital television and radio and has a highly successful e-commerce sector. This creates the perfect base for developing the integration of communication channels, enabling UK advertising agencies to produce campaigns that specifically suit a brand and its key consumers across all media platforms.

Digital advertising is a particular area of strength. The UK has the most advanced digital advertising market in the world, with over 30 per cent of expenditure online⁹.

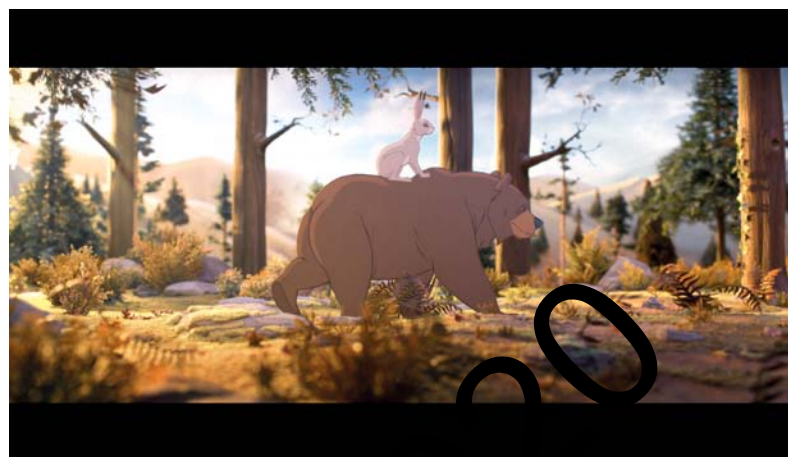
For all these reasons, UK advertising agencies are increasingly acting as a strategic and creative hub to the world for companies from Europe, Asia, the Middle East and South America who are seeking to internationalise their brands.

£2 billion

Advertising is a major source of export revenue for the UK, selling over £2 billion in services overseas each year⁸.



Ministry of Sound 'Chilled' campaign created by Fold7



Adam & Eve DDB, 'The Bear and the Hare' for John Lewis

Animation

With distinct and successful centres of production excellence throughout the country, the UK has a vibrant and growing animation sector, producing animated content for television, feature films, commercials, websites and computer and video games. Key regional hubs include Bristol, Cardiff, Dundee, London and Manchester.



**Shaun
the
Sheep**



Top-rating international show, Peppa Pig

Animation is the type of business that is central to the future of the UK economy - knowledge intense, IP generating and with real export potential.

Offering expertise in a wide range of specialisms, the UK animation industry is original, eclectic and celebrated for its great, ironic sense of humour and ability to deliver mass global appeal. It is particularly acclaimed for its pre-school storytelling and design animation, producing such hits as cut-out multimedia animation TV series *Charlie and Lola* (Tiger Aspect Productions). It also has a global reputation for its expertise in short film animation, such as Aardman Animation's Oscar-winning *Wallace & Gromit* series, and stop motion animation, as showcased in *Fantastic Mr. Fox* and *Frankenweenie*.

The UK animation industry has a long track record of creative and commercial success both at home and abroad. Iconic programmes such as *Moby*, *The Night Garden* and *Thomas and Friends* were devised, developed and animated in the UK, and exported around the world and have become true global phenomena.

Renowned for the development and use of innovative techniques and technology, UK animation companies are pioneers in the production of computer-generated animation for video games, and computer-generated visual effects

for TV commercials and feature films. Increasingly, UK animation studios work in collaboration with overseas partners, particularly in the US, helping them to deliver their output to a wider global audience.

The UK animation industry is highly successful in terms of the ancillary licensed products that it generates, such as children's DVDs, books and toys. *Peppa Pig*, for example, which is watched in 80 countries, has DVD sales of over five million, a videogame selling 225,000 copies and book sales exceeding two million (2011 figures).

Beyond its purely economic significance, UK animation has great cultural importance, contributing to the country's identity, fuelling children's imagination and helping to promote the UK globally.

Animation is the type of business that is central to the future of the UK economy - knowledge intense, IP generating and with real export potential. Thanks to a generous tax relief system, strong support from broadcasters such as Channel 4, more flexible scheduling and the soaring popularity of the internet, the UK animation industry is well placed to go from strength to strength.

Case Study **Red Kite Animation**

Edinburgh-based Red Kite Animation has become a major player in international markets.

It has built up excellent relationships with partners throughout the world, developing projects with most of the major UK, European, North American and Asian broadcasters and producers.

Overseas successes include Red Kite's *Dennis and Gnasher* cartoon, based on the much-loved Beano character Dennis the Menace, which has been sold to markets such as the US and Australia.

"Overseas sales provide the majority of our project financing," states co-founder Ken Anderson. "Key markets include ASEAN, Australia, Canada, France, Germany and the US."

www.redkite-animation.com

Architecture

UK architects have been working internationally as a profession for over 100 years and are held in extremely high regard, designing some of the world's most recognisable buildings and structures.

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UK architects are highly active in urban regeneration, having played a leading role in the broad range of sustainable projects linked to the London 2012 Olympic and Paralympic Games.



*Velodrome at the Olympic Park
by Hopkins Architects*

As our cities grow ever larger the need for a sustainable future has become increasingly urgent. UK architects have met this challenge by providing an unparalleled diversity of experience, strength in depth and world-leading technical expertise in areas such as low carbon, responding to changing population, energy, transport and sustainability challenges, and building information modelling. They create environments that are visionary, sustainable and cost efficient.

UK architects are highly active in urban regeneration, having played a leading role in the broad range of sustainable projects linked to the London 2012 Olympic and Paralympic Games and in the regeneration of the wider East London area. UK architects are also responsible for designing some of the world's leading sporting venues and facilities, as well as high-profile civic buildings. Hopkins Architects designed the 2011 Cricket World Cup stadium in Pune, India, for example, while Zaha Hadid designed the Guangzhou Opera House in China.

The UK excels in the architecture of transport infrastructure, with UK architects regularly involved in the extension and redevelopment of major railway and metro stations and international airports. When you check in at Madrid Barajas Terminal 4, for example, you are doing so in a building designed by Rogers Stirk Harbour + Partners.

The UK architecture industry enjoys a global reputation for professionalism, integrity, design flair and delivery. In recent years, UK architects have been in particular demand in markets such as the Middle East, China and North America, with many practices setting up offices there.

The Royal Institute of British Architects (RIBA) sets the professional and educational standards for architects, both in the UK and overseas, and is highly influential globally. It validates over 90 courses in 23 countries¹.

Many foreign-born architects decide to base themselves as practitioners in the UK once they have completed their studies. This gives the country one of the most internationalised communities of architects in the world, whose diverse backgrounds, influences and ideas all contribute to cutting-edge creativity.

Case Study **Scott Brownrigg**

UKTI helped award-winning international architects, planners and designers, Scott Brownrigg, to set up an office in Singapore. The firm, which is currently working on a new campus for the University of Reading in the Iskander region of Malaysia - an hour's drive from Singapore - attended briefing days organised by UKTI to give them an understanding of how to do business in different countries around Asia.

Once in Singapore, group director Mike Warren met the local UKTI team who made useful introductions to local businesses. The company has since partnered with one such contact, AKDA Architects, to bid for new work. "UKTI's combination of local and regional knowledge helped us to manage our expectations as we set up in Singapore," says Warren. "Without a shadow of a doubt, our association with UKTI has given us credibility and allowed us to jump-start relationships with new potential partners."

www.scottbrownrigg.com

Computer games

There are just more successful producers of computer games in the world than the UK.

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The UK has the largest games development sector in Europe, generating £2 billion in global sales each year and contributing some £1 billion to national GDP¹. Key centres include Brighton, Cambridge, Dundee, Guildford, London, Liverpool, the Midlands, Newcastle and Yorkshire².

Globally renowned for their innovation, UK computer games studios create diverse, humorous and eclectic interactive entertainment widely regarded for its excellence by an international audience. From *Tomb Raider* to *Harry Potter* to *Grand Theft Auto*, UK-made games rank among the most popular in the world.

The UK is home to some of the world's most profitable games development studios, all of them with a proven track record of developing, publishing and distributing first-class content, both at home and abroad. Ninety five per cent of UK games developers export at least some of their products³, and on average 45 per cent of turnover is generated from international sales⁴. Established overseas markets include the US, Europe, Canada and Japan⁵.

The high quality of the country's games output reflects a strong bedrock of technical talent and training. Over three quarters of the UK games workforce hold an undergraduate degree, and there is a higher proportion of postgraduate degrees than in any other game sector in the world⁶.

All the large international studios have UK-based developers, and many have established their European headquarters in Britain. A major draw is the quality and size of the British games audience, which is one of the most established, diverse and progressive in the world.

A strong commitment to research and development helps UK games studios embrace new technologies and stay ahead of the game. British games designers have created new genres, from massively multiplayer online games to god simulations, as well as leading in the development of other categories, including real-time strategy, racing and role-playing games.

The UK is increasingly successful at producing games for social and mobile platforms, and many companies are taking advantage of the new opportunities offered by self-publishing⁷.

And it is not just escapist, thrills-a-second games that are produced. The UK games industry also actively engages with social issues and hosts a well-established serious games scene. In particular, the UK is a world leader in creating games that both entertain and educate children. Key examples include *Moshi Monsters*, made by British entertainment company Mind Candy.

Case Study Serious Games International

Serious Games was spun out of the Serious Games Institute at Coventry University in 2012 to develop commercial products that bring the excitement of computer games into real-life applications.

Recognising from day one the need to go global, Serious Games immediately began to research potential overseas markets. Having decided to focus on Southeast Asia, the company joined UK Trade Missions to Hong Kong, South Korea, China and Singapore, meeting local government representatives and potential clients. This helped it to decide on Singapore for its regional hub.

"UKTI has the local knowledge and contacts you need to get you in front of the right people," says Tim Luft, managing director of Serious Games International. "Trade missions are an inexpensive and effective way to get a feel for new markets, and launching our new Singapore office through the Overseas Market Introduction Service (OMIS) really kick-started our business there."

www.seriousgamesinternational.com

Grand Theft Auto V,
Rockstar Games



A strong commitment to research and development helps UK games studios embrace new technologies and stay ahead of the game.



Design

The reputation of UK design around the world has been growing steadily over recent years. The country has an extremely long history and track record in design dating back to the 19th century.

The UK's commercially focused design businesses create everything from consumer electronics to corporate identities, interiors to interactive interfaces, and furniture to Formula 1 cars, exporting their services to commercial partners across the globe. The country also has a buoyant craft sector, with a high number of smaller companies and individuals engaged in contemporary, traditional and heritage crafts and taking advantage of an international renaissance in interest in this field.

Passionately creative and original, UK designers excel at problem solving and are very business and client focused. They are renowned for taking into account the needs and wants of customers and interpreting them in a way that is innovative, quirky and unique.

The UK design industry offers world-class expertise and experience across a wide range of sectors and disciplines, with companies often excelling in more than one specialism. Key strengths are in branding and communications; product design; building and interiors design; multimedia, web and games design, as well as in design strategy and management.

Passionately creative and original, UK designers excel at problem solving.

Such capability is in high global demand, with UK designers successful not just in established markets such as the US and Europe, but also in the Middle East, Asia, including China, and parts of South America, which are increasingly embracing design as an important element of commercial strategy and international competitiveness. Leading names include Thomas Heatherwick, designer of the Lubetkin Prize-winning UK Pavilion at the 2010 Shanghai Expo and the London 2012 Olympic cauldron; Terence Conran; Tom Dixon; Ross Lovegrove; Wally Olins and Jonathan Ive, designer of the iPod, iPhone and iPad.

Supporting the UK design industry is the country's unrivalled design education system, epitomised by internationally respected institutions like the Royal College of Art and Central Saint Martins College of Art and Design. Attracting a high proportion of students from overseas, these feed into the UK's globally acclaimed, vibrant design industry.

Adept at rejuvenating and reinventing itself by embracing new techniques and modes of business, sustainability is increasingly at the heart of the UK design industry. A growing number of British design firms are demonstrating how design investment can address green issues for industry and are building waste-reduction criteria and environmentally friendly materials into their projects.

*Bright on Bistro chair,
Lee Broom*



Digital media

At the forefront of the international digital revolution, the UK combines cutting-edge digital technology and creativity in areas such as TV, film and radio production; music; video game development and mobile telecommunications.



Moshi Monsters, the social networking online game played by 50 million children



A strong tradition of innovation and creativity is fostered by smaller companies working with larger ones.

The UK has had a number of globally renowned achievements in digital media. It pioneered both digital television and radio; has played a major role in the development and deployment of higher-speed broadband; and is a key player in the development of mobile, small-screen content.

The UK Government is committed to building the infrastructure that supports the fast-growing digital media sector. Key initiatives include supporting the development of Tech City in London's East End. Originally a small cluster of high-tech firms, Tech City has grown dramatically in recent years to become London's leading destination for digital, creative and high-technology companies helping it in its aspiration to be the digital capital of Europe.

Almost all the major global technology businesses have operations in the UK attracted by its strong and established digital audience. British consumers have a huge appetite for new digital services, with high levels of take-up of new networks and devices.

Another draw is the highly educated and skilled digital workforce. Over 120,000 people study digital media disciplines¹ at UK-based universities.

Digital Britain

- The UK is Europe's largest market for MP3 players, digital music downloads, flat panel TVs and video games².
- The UK has one of the highest numbers of Wi-Fi hotspots in the world.
- The UK is ranked as one of the world's top internet gateways, with very high international bandwidth and a significant percentage of inter-regional traffic.
- 80 per cent of UK households had an internet connection in 2012; 75 per cent of UK households have broadband³.
- Nearly half of all UK adults use social networking sites such as Facebook and Twitter⁴.
- 44 per cent of UK homes have a Digital Audio Broadcasting (DAB) receiver⁵.
- The UK has more than 70 legal digital music services⁶.
- Half of all UK adults own a smartphone⁷.
- The UK has the biggest e-commerce market in Europe⁸.

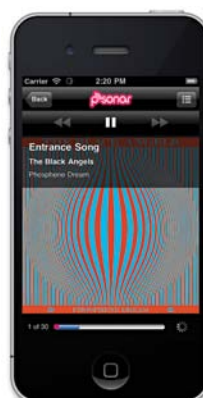
Case Study RealtimeUK

RealtimeUK is a Co studio in North West England that creates visual content for marketing campaigns and digital projects.

In early 2013, RealtimeUK was considering setting up in the US. It planned a 10-day market visit, for which UKTI provided background research and a grant of 50 per cent of the costs involved. Speaking to prospective clients during the visit, it became clear that the company didn't actually need a physical presence to pursue business in the US, saving it unnecessary costs and effort.

"There's no more effective way to understand your target market than to sit down in front of a potential client for a frank and open discussion," says Tony Prosser, managing director at RealtimeUK. "UKTI's support has been massively beneficial, helping us to make the most of our market visit."

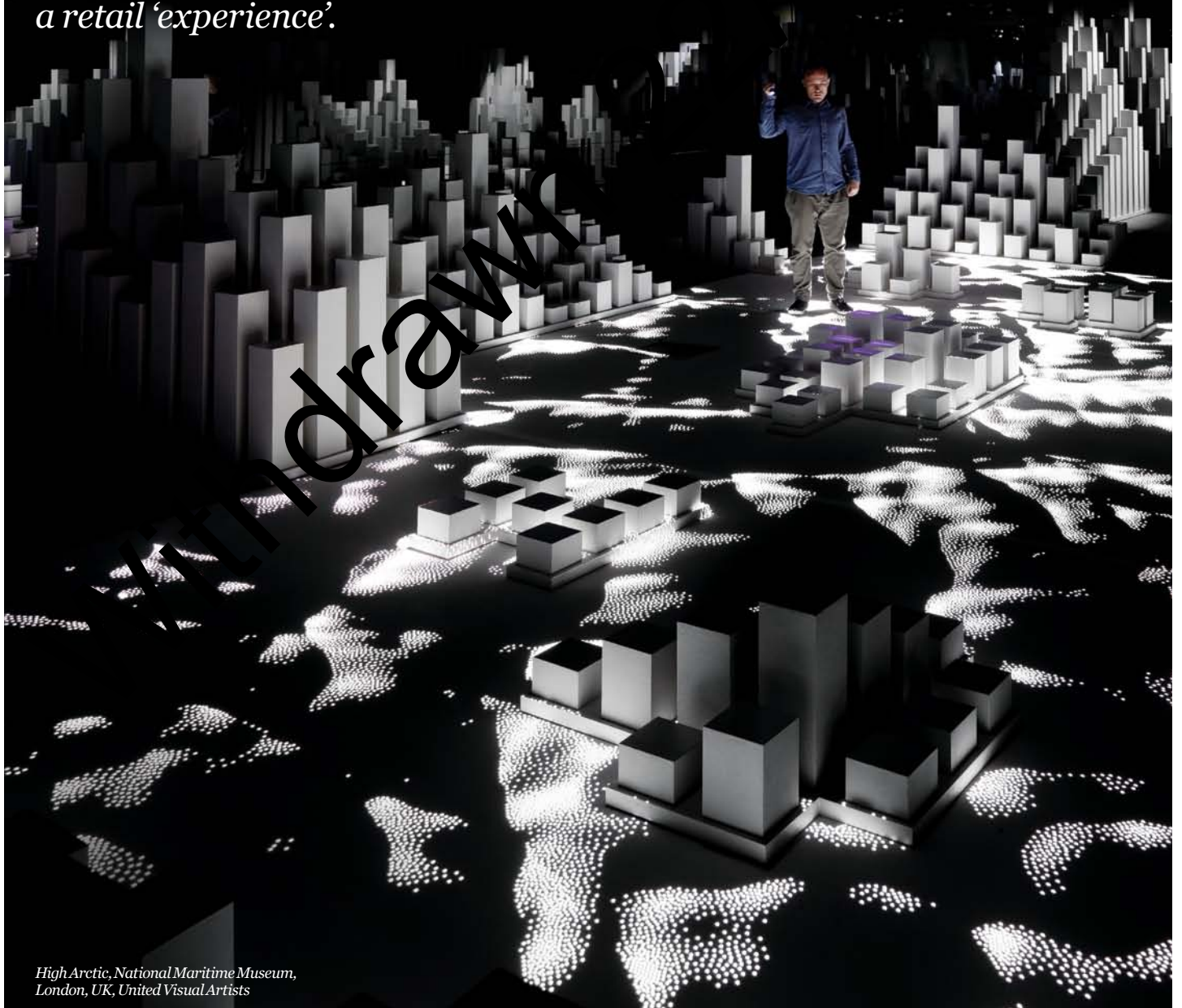
www.realtimeuk.com



Psonar, pay-as-you-go music streaming service

Experience economy

The UK is one of the world's leaders in the aptly named 'experience economy' – the creation and operation of visitor attractions such as museums, art galleries, heritage sites, theme parks, aquaria, gardens, zoos, and even shopping malls, which are increasingly by a retail 'experience'.





Radical Fashion exhibition
at the V&A by Event Communications

Imagination, use of cutting-edge technology and a clear understanding of visitor needs are the hallmarks of UK companies specialising in the design and installation of galleries and exhibits.

There are countless world-class visitor attractions in the UK – many of which have come about as a result of British ingenuity and expertise. The Eden Project in Cornwall is British both in design and execution, as is the British Music Experience, a high-tech, interactive music museum based at The O2 in London. The country's great museums and galleries, such as the British Museum, the Natural History Museum, the V&A and Tate Modern, enjoy internationally renowned collections and huge visitor numbers.

The UK's long tradition in the experience economy has created an unparalleled expertise in making such attractions appealing to visit. Not long ago, many children found a trip to an amusement park almost a punishment – something that is no longer the case.

UK companies are increasingly deploying these skills overseas, particularly in emerging markets, which are showing growing interest in this area. Noted for their respect for local culture and traditions,

UK firms enjoy a strong reputation for successful interpretation of heritage. Imagination, use of cutting-edge technology and a clear understanding of visitor needs are the hallmarks of UK companies specialising in the design and installation of galleries and exhibits, whether in traditional museums and leisure centres or spaces such as shopping malls and transportation hubs.

Other strengths include the provision of feasibility and economic impact studies for leisure and entertainment attractions, as well as internationally renowned capability in architecture, engineering and construction, which brings visitor attraction designs to reality.

UK-based specialists also have expertise in the restoration, repair and conservation of historic artefacts and objects, while a number of the country's universities and major museums offer training and career development in museum management and operation.

Case Study Event

Event designed two theme exhibitions at Amsterdam's National Maritime Museum.

The company worked closely with the curators to tease out the narratives of their very different subject areas and identify which aspects would most appeal to younger visitors. In design terms, Event's response needed to take into account the constraints of the historic building in which the museum is housed. The exhibition spaces are made up of a series of rectilinear galleries, similar in size, with striking period features. The new displays take visitors on a linear journey, evoking distinct environments and experiences, which seek to hold the attention and fulfil the narrative-led brief.

www.eventcomm.com



UK fashion has a unique spirit and energy that ignites the imagination of the world. From its cutting-edge trailblazers to the refined craftsmanship of its star designers, the originality and professionalism found in the UK make it one of the most influential fashion hubs in the world.

Fashion

From high street to haute couture, UK fashion is international in outlook, translating trendsetting British creativity into a dynamic global industry. Some of the most iconic brands in contemporary fashion are from the UK, with young designers understanding that to be successful they have to be both creative and commercial.

Today, the country is home to leading designers of all types of clothing, many of them possessing the ability to take a classic style or fabric and turn it into something very different and innovative. Menswear is a particularly buoyant area, with a great resurgence of interest in UK menswear designers in Asia. Markets such as Japan, Hong Kong and South Korea are big fans of innovation in fashion and are attracted by the creative approach offered by designers such as Christopher Raeburn, E. Tautz and J. W. Anderson, to name just a few. London's Savile Row is widely considered one of the world's premier centres for bespoke male tailoring.

Ladieswear designers, from worldwide names such as Stella McCartney to up-and-coming talent like Erdem and Mary Katrantzou, are also extremely popular, as are UK-based footwear, jewellery and accessory designers, such as Jimmy Choo and Denison Boston.

The UK continues to manufacture some high-end luxury items of clothing and textiles. Major British brands such as Mulberry and Burberry have maintained a domestic manufacturing presence, buoyed by the high global demand for quality UK fashion products.

In the UK, art, music and fashion feed off each other, making the country's educational institutions the best in the world for nurturing the skills and imaginations of fashion students from around the globe. Places such as London's Central Saint Martins College of Art and Design and Cordwainers at The London College of Fashion, which offers specialist courses in footwear and accessories, produce highly finished and polished designers that are brilliant at making beautiful and modern clothes.

UK fashion graduates are incredibly sought after both at home and abroad, with many of them working as consultants for international buyers and labels as well as setting up their own brands. Some go on to head up global fashion houses and retail chains and become as well known overseas as they are at home. Indeed, UK designers export two-thirds of their output¹, while UK footwear companies sell over 90 per cent of their production around the world².

London Fashion Week (LFW) is a major showcase of the UK's tenacious and groundbreaking talent in this sector, and holds a pivotal role in the international fashion calendar. A great source of youth and ideas, and an increasingly digital medium, orders of more than £100 million are estimated to be placed during LFW each season³.



Pop-Out Parka

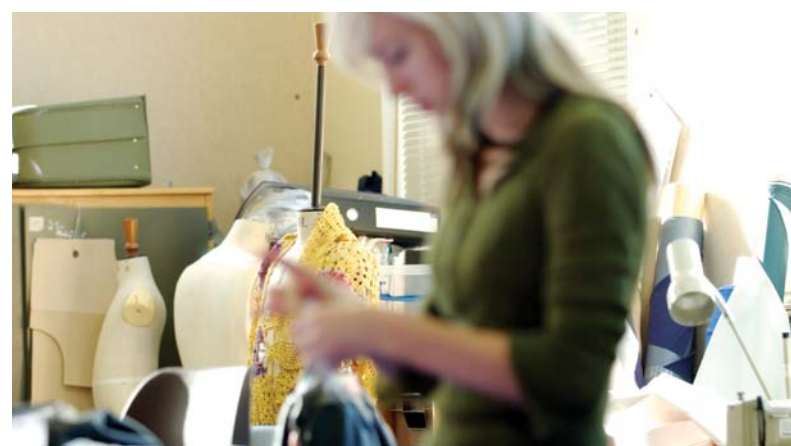
Case Study Christopher Raeburn

Inspired by the challenge of creating ethically aware men's and womenswear, the collections of British fashion designer Christopher Raeburn have become known for his signature use of recycled parachute material to create garments that are functional, intelligent and meticulously crafted. The clothes are notable for their intelligent design, high quality and extreme attention to detail.

A graduate of London's prestigious Royal College of Art in 2006, Raeburn's collections are increasingly in demand from overseas stockists.

"Exports are currently a very big part of our business," he says, "representing over three-quarters of turnover. Our main overseas markets are North America, Europe and Asia. Exports are where a lot of our future lies."

www.christopherraeburn.co.uk



Fashion student at
Batley School Of Art
and Design



Film

The UK film industry is a major international success story. It is a regular and celebrated collaborator with major US studios on big-budget pictures such as Harry Potter, as well as being a successful independent producer of smaller, quality films.

Thor: The Dark World, starring Idris Elba, shot in the UK. Courtesy of Marvel

The diversity and quality of UK films and film-industry expertise resonate across borders, cultures and societies, winning respect, audiences and awards all over the world. This quality is illustrated by the presence of three British-produced titles - *Harry Potter and the Deathly Hallows, Part 2*, *The Dark Knight Rises* and *Skyfall* - featuring in the top 10 highest-grossing films of all time.

British actors, directors, writers and crew work on films produced around the world. Internationally recognised names include Danny Boyle, Daniel Craig, Richard Curtis, Dame Judi Dench, Keira Knightley, Colin Firth, Sir Ian McKellen, Steve McQueen, Christopher Nolan, Ridley Scott, Kate Winslet and David Yates, plus many more.

The figures speak for themselves. Ten of the top 20 global box-office successes of the last 12 years were based on novels by UK writers, two-thirds of the top 200 films released worldwide since 2001 have featured UK actors in lead or prominent supporting roles, while 27 have had UK directors!

The UK is one of the world's most desirable locations for producing films. The British Film Commission - the Government agency responsible for supporting the production of international feature film and television in the UK - provides free tailored support as well as guidance on the UK's generous film and television tax reliefs. Studios such as Pinewood, Shepperton, Warner Bros. Studios Leavesden, Elstree, 3 Mills and Ealing excel at everything from independent and blockbuster features to shorts and from animation and drama to documentaries.

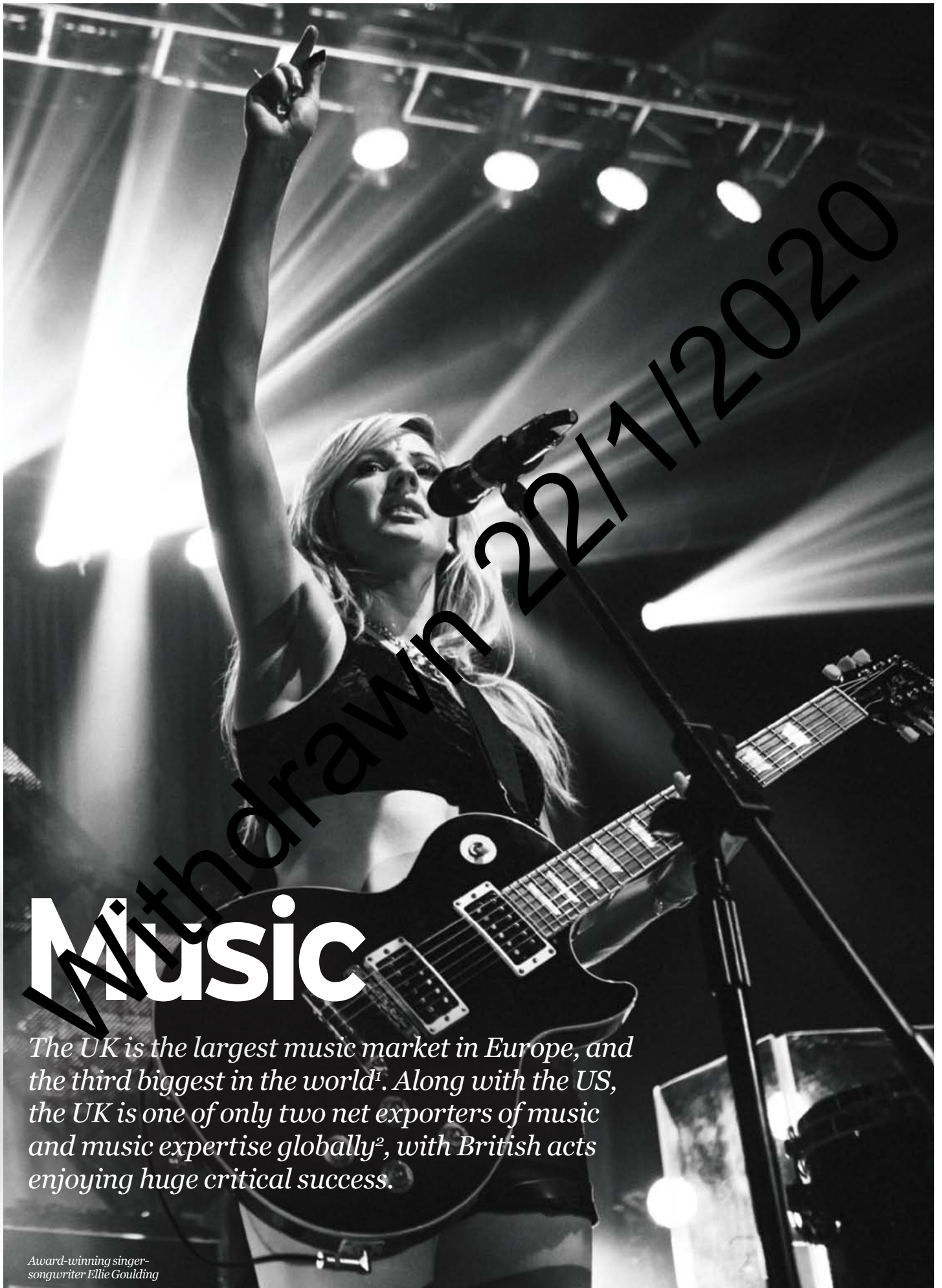
Recognised as being one of the few places in the world that has the skills, infrastructure and technologies required to produce major Hollywood movies, the UK film industry relishes the opportunity to work in international teams and is regularly involved in successful co-productions with partners around the globe.

It also has an extremely successful post-production sector, whose highly skilled workforce provides sound, music and physical and visual effects (VFX) for films worldwide. London's Soho is widely acknowledged as the most important global hub for VFX production, boasting three Oscar-winning facilities and in-demand boutique houses.

The UK provides a film friendly environment for all productions, from pre-production through to delivery, and is one of the world's most desirable locations for filming.



Oscar-winning Gravity starring Sandra Bullock and George Clooney, filmed, and with VFX provided, in the UK. Courtesy of Warner Bros. Pictures



Music

The UK is the largest music market in Europe, and the third biggest in the world¹. Along with the US, the UK is one of only two net exporters of music and music expertise globally², with British acts enjoying huge critical success.

Award-winning singer-songwriter Ellie Goulding

Ever innovative, the UK music industry is a pioneer in technological developments, enthusiastically embracing the digital age.



Defined for its energy and originality, the UK's music industry has a strong and unique identity, building on a long and proud heritage. For over 50 years, British musicians have enjoyed international success, with a roll call that spans acts from the 1960s and 1970s such as The Beatles and the Rolling Stones to more recent artists like Emeli Sandé, Coldplay and Ellie Goulding. Enriched by the country's highly diverse and cosmopolitan society, which has helped to produce distinctive, edgy and globally appealing British sounds, UK music has played a pivotal part in the development of new musical forms.

Professionalism is the hallmark of the music industry in the UK, with talent and skills nurtured in an extensive network of music schools and colleges. Examples include the BRIT School, which has helped to launch the careers of award-winning artists such as Amy Winehouse, Leona Lewis and Adele.

Home to some of the world's best music venues, the UK has a thriving live music scene, from the grassroots level in pubs and clubs to world-famous festivals. This helps to develop new and upcoming acts, makes the UK a must-stop destination for international artists on tour and proves a powerful magnet for overseas tourists.

Ever innovative, the UK music industry is constantly evolving and is a pioneer in technological developments, enthusiastically embracing the digital age. Thanks to the internet and the proliferation of new digital services, UK music is being discovered, accessed and enjoyed by a new wave of consumers in markets across the world.

Case Study **Notting Hill Music**

London-based independent music publishing company, Notting Hill Music, is enjoying renewed success in Japan and Southeast Asia, thanks to support from UKTI.

After many years of doing business with Japan, the company joined a 10-day visit to the country organised by UKTI. The organisation had arranged presentations by senior personnel at Sony Records and Universal, followed by question and answer sessions, giving delegates a snapshot of the Japanese music scene.

Since then, Notting Hill Music has had three number-one hits, and a number three, in Southeast Asia.

"Making this visit to Japan with UKTI was invaluable," says John Saunderson, head of A&R at Notting Hill Music. "We met the top people at Sony and Universal, and got to talk about how to get involved with their business. The recent success we have had in Southeast Asia since then all stems from this trip."

www.nottinghillmusic.com

The performing arts form one of the largest and most diverse sectors in the UK creative and cultural industries, with players ranging from large commercial organisations to micro-businesses.

Performing arts



*A scene from War Horse
at the New London Theatre*

Some of the world's most innovative technical ideas in the performing arts originate in the UK.

The UK is known throughout the world for the presentation of professional performance. It excels in a wide range of areas, including theatre, stand-up comedy, live literature, musicals, opera, classical music, dance and ballet, hip-hop, street performances, carnival and circus.

Internationally acclaimed centres for the performing arts can be found nationwide. In London, for example, there are an estimated 200 shows to choose from every day¹.

Performing arts festivals of all types flourish in the UK. There are hundreds held across the country, ranging from the Edinburgh Fringe Festival, the Notting Hill Carnival and the BBC Proms, to one-day celebrations of local and community arts.

Spellbinding UK talent performs across the globe. Large-scale musicals such as *Les Misérables*, *Phantom of the Opera*, *Cats*, *Mamma Mia!* and *Billy Elliot the Musical*, for example, have been seen live by millions of people worldwide, while plays such as *Jerusalem*, *Red*, *War Horse* and *One Man, Two Guvnors* have enjoyed hugely successful runs on Broadway, winning multiple awards. Cutting-edge British comedians like Ricky Gervais, Lee Evans and Eddie Izzard have broad appeal both at home and abroad.

Much of the UK's expertise in this sector is nurtured in its wide range of world-class institutions for performance art education and training, which attract students from all over the globe.

The UK is a breeding ground for new performance work. Pioneers include the Royal Court Theatre in London and the Manchester International Festival, the first festival in the world to focus exclusively on original, new work.

Some of the world's most innovative technical ideas in the performing arts originate in the UK. The Royal Shakespeare Company, for example, developed a revolutionary device which allows moving lights to be rigged on very lightweight hanging or in-own structures.

Performing arts organisations in the UK are constantly forging and reinforcing relationships with their counterparts around the world.

Examples include the Royal Opera House, which has developed strong links with opera houses in China, India and Oman.

The sector is also exporting its skills and experience in the design and construction of cutting-edge venues and production facilities, with UK specialists taking on advisory roles and winning contracts around the world.



*Paul Kaye as Mr Wormwood,
Cleo Demetriou as Matilda
in Matilda The Musical*

Publishing

*Publishing is one of the most successful
of the UK's creative industries.*



The UK has one of the world's leading publishing industries, producing books, newspapers and magazines that sell globally.

Characterising the UK publishing industry is the breadth, depth and quality of content it creates, as well as the multiple ways in which that content is brought to market.

Book publishers in the UK produce around 150,000 new titles a year¹, while the country is also a prolific publisher of newspapers and periodicals. The UK customer publishing industry is the most developed in the world².

Key strengths include academic publishing. Scientific and technical books and journals published in the UK can be found in classrooms, libraries, laboratories and offices on every continent.

The UK is also a leader in educational publishing, consistently producing materials that engage students, support teachers and deliver high-quality successful learning.

Another major area of expertise is children's fiction, picture books and children's information publishing. J.K. Rowling's *Harry Potter* series is arguably the world's greatest children's publishing success story of recent years.

The UK publishing sector is highly successful in overseas markets; over 40 per cent of the UK book publishing industry's revenue is generated by export sales³.

Culturally and commercially diverse, the UK publishing industry is home to a number of highly successful independent companies, as well as thousands of very small operations focusing on specialist areas. There are also successful niche publishers for minority groups.

The UK's world-class literary heritage drives not only a thriving book trade, but also seeds creativity in other sectors, like film, television and theatre. Many successful British books, for example, have been turned into internationally acclaimed films and stage shows, such as Michael Morpurgo's *War Horse* and Roald Dahl's *Matilda*.

Supporting the UK publishing industry is its commitment to technical and commercial innovation. UK publishing companies are at the forefront of the knowledge economy and are a driving force in the development and implementation of digital business models. They have also been pioneers in the introduction of environmentally friendly strategies for their businesses, increasing the use of sustainable paper resources and reducing damaging chemical production processes.

Case Study Igloo Books

Specialist publisher Igloo Books exports its titles across the globe, publishing in 25 languages. Having started exporting in English-speaking countries such as Australia, Canada, New Zealand and the US, Igloo has since established key partnerships to achieve success in Brazil, France, Germany, the Netherlands and Spain.

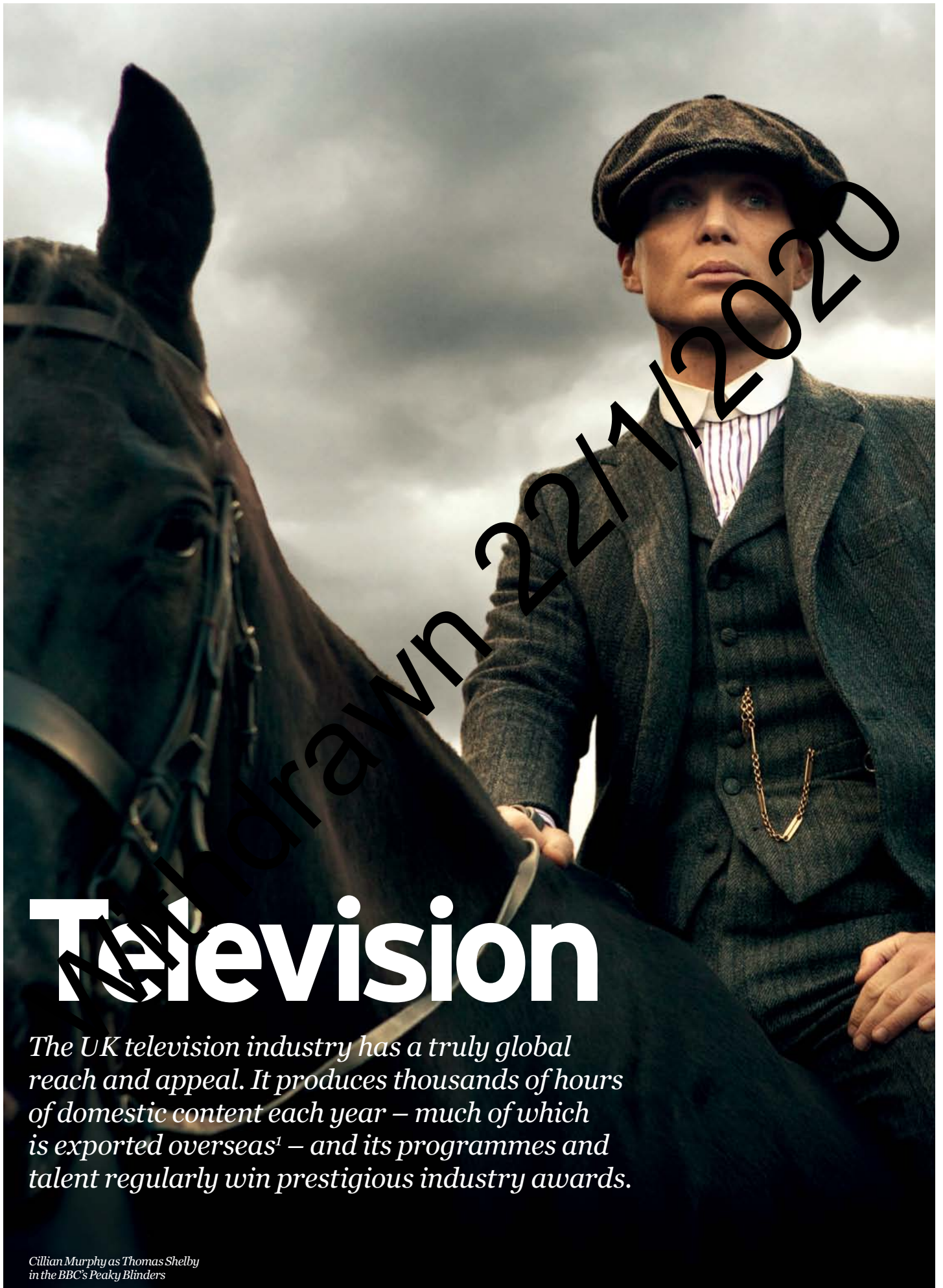
Director and co-founder John Styring says: "In terms of quality we are up there with the best publishers in the world, and with regard to service we pride ourselves on making our customers' jobs as easy as possible. And focusing on value, our books cost less than all our competitors."

www.igloo-books.com



Group of students, Woodhouse Grove School, Leeds

Characterising the UK publishing industry is the breadth, depth and quality of content it creates, as well as the multiple ways in which that content is brought to market.



Television

The UK television industry has a truly global reach and appeal. It produces thousands of hours of domestic content each year – much of which is exported overseas¹ – and its programmes and talent regularly win prestigious industry awards.

Cillian Murphy as Thomas Shelby
in the BBC's Peaky Blinders



The first 11 Doctors line up for the 50th anniversary of Doctor Who in 2013

Known worldwide for its pioneering spirit, the UK television industry looks set to go from strength to strength in the new digital age.

Enjoying a strong international reputation for the quality, quantity, creativity and diversity of its programming, the UK television industry is popular across the globe. Innovative and original, UK programme makers are very good at coming up with new and fresh ideas, and welcome the opportunity to work in partnership teams with international collaborators. They also benefit from the investment of the BBC and the UK's commercial broadcasters in exciting up-and-coming talent.

Additionally, the UK is increasingly becoming a base for major international productions, with programme makers attracted by the world-class facilities and the generous High End Television Tax Relief, introduced in 2013. International companies choosing to shoot in the UK, including HBO, Starz, Sony, CBS, Lionsgate and Fox, also benefit from the advice and assistance of the British Film Commission, the Government's national body responsible for supporting and maximising the production of international film and television in the UK¹.

Popular British television series such as *Downton Abbey*, *Spooks*, *Sherlock*, *Life on Mars*, *Doctor Who*, *Kitchen Nightmares* and *Midsomer Murders* have secured unprecedented success in the international arena, as have documentaries like *Planet Earth* and innovative formats such as *The X Factor*, *Masterchef*, *Who Wants to be a Millionaire?*, *Strictly Come Dancing* and *Top Gear*. The estimated total revenue from the international sale of UK television programmes and associated activities was over £1.2 billion in 2012, up 4 per cent on the previous year².

The strength of the UK television production sector is a key factor behind the growth in British television exports. Supported by the world-class expertise of the country's distributors, it has hundreds of successful and innovative independent television production companies, many of them specialising in different genres, who make programmes to be sold to the major broadcasters. They also regularly work overseas with international partners.

The profits that UK television programmes generate are often boosted by highly successful ranges of spin-off products, such as DVDs, books and websites, which are enjoyed and accessed by people all over the world. BBC.com, for example, has a huge international reach, with millions of users overseas³.

Known worldwide for its pioneering spirit, the UK television industry looks set to go from strength to strength in the new digital age. The UK was the first country to launch digital television services in 1998 and is the world's most advanced digital television market, with all platforms being utilised and explored.

Jack Donnelly, Mark Addy and Robert Emms star in Atlantis



The UK's creative expertise and experience are truly national, with centres of excellence found across the nine English regions and in Northern Ireland, Scotland and Wales.

Creativity around the UK

Northern Ireland

Northern Ireland is a region rich in creativity and enjoys a worldwide reputation for its innovative content. The region is fast becoming the location of choice for international film and TV companies. Its expertise in all areas of TV and film production is evidenced by the number of large-scale productions being shot in studios and on location across the region.

Major productions in 2019 included *Game of Thrones*, series four; Universal Pictures' *Dracula*; and the BBC's *The Fall*. The region's premier film production facility, Belfast's Titanic Studios, is one of the largest and most modern film and television production studios in Europe.

Other key creative industries include animation, VFX, mobile content and e-learning solutions; as well as a thriving music sector, with world-famous musicians such as Snow Patrol and Van Morrison.

Scotland

Scotland is alive with an incredible range of creative talent.

With hubs in Edinburgh, Glasgow and Dundee, Scotland is home to many of the UK's video games companies, including Dynamo Games, Olay Entertainment and Rockstar North, which have produced an impressive list of iconic, globally successful games.

The University of Abertay in Dundee was the first university in the world to offer a degree course in Computer Games Technology.

Scotland has thriving screen industries. Hundreds of facilities operators and production companies are based there, including major broadcasters and numerous independents, many of which are enjoying international success. Major films recently shot or set in Scotland include *World War Z*, *Cloud Atlas* and *Brave*.

Wales

The creative industries have been identified as a key driver of business growth in Wales. They provide employment for more than 30,000 people and generate annual turnover in excess of £1bn¹.

Television is particularly important, with Welsh TV companies regularly producing content for international and UK network transmission. Wales is the BBC's chosen centre of excellence for drama production. BBC Wales, for example, produces *Doctor Who* and *Casualty*, two of the UK's most popular programmes. *Da Vinci's Demons*, *Atlantis* and *Sherlock* are also filmed and produced in Wales. Tinopolis and Boom, two of the largest independent producers in the UK, are based there.

Wales also has a growing video games sector. Successful companies include ChaosTrend, Wales Interactive and Oysterworld Games. The Welsh Government offers a dedicated Digital Development Fund to support commercial exploitation of digital content, products and services.

Withdrawn 22/1/2020



Set build, *Game of Thrones*,
in Titanic Studios, Belfast



New bus for London,
Heatherwick Studio

East of England

The East of England is a magnet for creative people from across the globe.

Key sectors include film and television production, which contributes tens of millions of pounds to the regional economy. The East of England has the largest concentration of film/TV studios outside Hollywood, half the national total. They include Leavesden, where blockbusters such as *Harry Potter* were filmed; Cardington, where *The Dark Knight* and *Inception* were made; and Elstree, home to top TV shows such as *Britain's Got Talent*.

Another increasingly important sub-sector is publishing, with activity centred around Cambridge, Peterborough, St Albans and Colchester. Cambridge University Press, for example, is one of the oldest and most highly regarded academic presses in the world, while the University of East Anglia is renowned for its pioneering courses in creative writing.

East Midlands

The East Midlands offers a vibrant mix of creative talent across a wide range of industries.

Interactive and digital media is a particular strength. Nottingham has a number of successful and expanding interactive firms, while there is an emerging IPTV cluster in Lincolnshire.

The region plays host to some of the UK's leading games developers, as well as numerous animation studios and the Animation Academy, a Loughborough University-based research group.

A number of leading design agencies and architectural practices are also located in the East Midlands. Examples include Benoy, which has built its award-winning reputation on securing high-profile contracts in overseas markets.

London

London is a global hub for virtually every creative discipline. Some 50 different design specialisms are practiced in the capital at the very highest level.

London is one of the world's main television and film production centres, offering state-of-the-art facilities and internationally renowned expertise in specialist areas such as visual effects.

Along with Milan, New York and Paris, London also ranks among the "big four" fashion cities, with its trailblazing designers increasingly setting global trends and securing sales in overseas markets.

Many of the world's leading architectural practices are based in London, including the likes of Foster + Partners and Zaha Hadid, while the city is widely considered to be the digital capital of Europe, buoyed by initiatives such as Tech City - an area of East London that has seen the arrival of hundreds of digital, high-tech firms in recent years.



The Sage Gateshead



Brand design for the Umbro International Cup by LOVE



Dark Shadows set on the Paddock lot at Pinewood Studios

North East

The North East has a growing and competitive creative economy.

Digital industries constitute one of the region's burgeoning sectors, attracting attention from across the world. In recent years, there has been an impressive number of new start-ups in digital media and animation, with a particular cluster around the Tees Valley and Middlesbrough.

Offering world-class locations, skills and facilities, the North East has a proven ability to facilitate critical and commercial success in film and content production, with new talents emerging.

The North East's performing arts and music sectors have enjoyed considerable growth in recent years, accelerated by investment in venues such as The Sage Gateshead, Dance City and Live Theatre.

North West

The North West leads the way in creating innovative content and delivery for TV, film and multimedia platforms. It is home to MediaCityUK, one of the largest media cities of its kind in Europe, complemented by The Sharp Project, a virtual super studio. Liverpool-based luminaries Lime Pictures and Conker Media add considerable value to this regional mix.

Offering globally acclaimed games production studios, Liverpool is considered one of the world's leading games development centres. Other animation, software and new media companies are also well established. Examples include interactive teaching technology specialist Promethean, which continues to thrive globally.

The North West also has the UK's biggest regional advertising sector, with global players such as McCann Erickson and TBWA, as well as a world-famous music industry.

South East

The South East holds a prime position in the global creative industries sector.

It is the base for some of the world's leading video games and interactive media companies, many of them, like Lionhead and Kuju Entertainment, clustered in the Guildford and Woking area and Brighton & Hove.

The strength of the telecommunications industry in the South East has helped to advance the development of content creation and mobile technology in the region. Pioneering companies include Affinity Studios, Mobyia and iCrossing.

The South East is home to Pinewood Studios Group, Europe's largest film and television studio facility. This has accommodated some of the most spectacular moments, memorable stars and ambitious sets on screen.

Oxford is a leading location for academic, educational and STM publishing and is considered by many to be the birthplace of children's publishing.

Withdrawn 22/11/2020



Dyson AM01 desk fan



Dirt Showdown, designed and developed at Codemasters

South West

The South West is home to a wide range of successful creative businesses.

Thanks to its first-class audiovisual production facilities, the region is particularly renowned for its television industry. Home to the BBC's Natural History Unit, Bristol is the largest centre for natural history film-making in the world.

The South West is also a centre of excellence in animation and innovative digital media. It is the base for Aardman Animation, which exports its films, TV series and commercials across the world.

Moreover, the region has one of the highest concentrations of design companies outside London, with award-winning agencies of all sizes and specialisms. There is also a thriving community of craftspeople and artists, as well as world-class recording studios such as Real World and Sawmills.

West Midlands

The West Midlands has a thriving creative community.

Birmingham is one of the largest media centres in the UK, while Leamington Spa is the home of the region's video games industry, with established names such as Codemasters.

Film and TV production is another area in which the West Midlands is increasingly active, thanks to its diverse locations, excellent facilities and experienced crew. BBC Birmingham's Drama Village offers cutting-edge broadcasting technology.

The West Midlands is also a music hotspot, hosting leading festivals such as *Gigbeth*, *Supersonic* and *V*.

Yorkshire and The Humber

Yorkshire and the Humber is a leading centre of excellence in the creative industries.

It is internationally renowned for its fast-growing digital media industry, leading the UK in the deployment of next-generation access of fibre broadband.

Home to a world-class video games industry, much of it centred around Sheffield, there is also a high number of education software manufacturers and some of Europe's largest procurers of e-learning technology and content.

A host of well-known performing arts companies, including the Hull Truck Theatre and Opera North, are based in Yorkshire and the Humber, while world-famous musicians and recording artists such as the Arctic Monkeys and Corinne Bailey Rae originate from the region.

Boosting the area's creative credentials even further, Hull will be the UK's City of Culture in 2017.

For further information visit:
www.ukti.gov.uk/export/unitedkingdom



*Desh, direction, choreography
and performance by Akram Khan*

End notes

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Government and National Organisations

Arts Council England
www.artscouncil.org.uk

British Council
www.britishcouncil.org

Department for Business,
Innovation & Skills
www.bis.gov.uk

Department for Culture, Media & Sport
www.culture.gov.uk

VisitBritain
www.visitbritain.co.uk

Trade Associations and Related Organisations

Advertising
Advertising Producers Association (APA)
www.a-p-a.net

Institute of Practitioners in
Advertising (IPA)
www.ipa.co.uk

International Visual Communications
Association (IVCA)
www.ivca.org

Architecture
Architecture & Design Scotland (A+DS)
www.ads.org.uk

Royal Institute of British Architects (RIBA)
www.architecture.com

Design

British European Design Group
www.bedg.org

Chartered Society of Designers
www.csd.org.uk

Crafts Council
www.craftscouncil.org.uk

D&AD
www.dandad.org

Design Business Association
www.dba.org.uk

Design Council
www.designcouncil.org.uk

Designersblock
www.verydesignersblock.com

Design Nation
www.designnation.co.uk

Innovation Bank
www.britishdesigninnovation.org

Digital media

Producers Alliance for Cinema and Television (PACT)
www.pact.co.uk

TechUK
www.techuk.org

Experience economy**visitor attraction**

British Expertise
www.britishtourism.co.uk

Experience UK
www.experienceuk.org.uk/directory/alpha

Museums Association
www.museumsassociation.org

TILE (Technology in Leisure and Entertainment)
www.tileweb.org

Fashion

British Allied Trades Federation
www.batf.uk.com

British Fashion Council
www.britishfashioncouncil.com

British Footwear Association
www.britishfootwearassociation.co.uk

British Menswear Guild
www.british-menswear-guild.co.uk

UK Fashion and Textile Association
www.ukft.org

Games

Association for UK Interactive Entertainment (UKIE)
www.ukie.info

TIGA
www.tiga.org

Music

Association of Independent Music (AIM)
www.aimindie.com

Association of Professional Recording Services (APRS)
www2.aprs.co.uk

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www.bpi.co.uk

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www.iamaworld.com

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www.mia.org.uk

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www.themmf.net

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PPL
www.ppluk.com

PRS for Music
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Publishing

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www.ipg.uk.com

Professional Publishers Association (PPA)
www.ppa.co.uk

Publishers Association (PA)
www.publishers.org.uk

Screen industries

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www.britishfilmcommission.org.uk
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enquiries@britishfilmcommission.org.uk

British Film Institute (BFI)
www.bfi.org.uk

British Kinematograph, Sound and Television Society (BKSTS)
www.bksts.com

Film Export UK
www.filmexportuk.com

Producers Alliance for Cinema and Television (PACT)
www.pact.co.uk

UK Screen Association
www.ukscreenassociation.co.uk



UKTI

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